

Oregon Developmental Disabilities Services

STATUS REPORT

Community First Choice Option (K Plan)

Date: January 21, 2014

Project Owner: Trisha Baxter

Steering Team members: Lea Ann Stutheit, Shelly Reed, Chelas Kronenberg, Eleshia Ledridge, Nelsa Brodie, Bruce Baker

Cross Program Team Leads: Marilee Bell, Kristine Duffy, Julie Harrison, Darlene O'Keefe, Bruce Baker, Mike Parr, Brent Watkins, Nelsa Brodie, Dana Hittle, Acacia McGuire

Overall project status:

July	Aug	Sep	Oct	Nov	Dec	Jan '14	Feb	Mar	Apr	May	Jun
G	G	Y	G	G	Y	G					

Dashboard status:

SCHEDULE	Y	High-level roadmap or Gantt chart showing how strategies unfold over time, leading to milestones and targets
SCOPE	G	Scope has been identified.
RESOURCES	Y	Strategy owners need to validate and add information additional information about adequate resources
CHANGES	G	New milestone created for the submission of individual CDDP/Brokerage plans to complete needs assessments within the next 90 days

Executive update:

At this time, the majority of the project work streams are on schedule and the overall project is trending green.

The FAQs regarding the FNAT went out to the field in an Information Memorandum (IM) on 01/17/14. Interpretation guidance was sent out in a Policy Transmittal (PT) on the same day.

Updated information and timelines have been added to the OAR work stream. Final proposed text changes to the Complaint and Hearings Rule are targeted for 02/01/14 with a 07/01/14 implementation date. The Eligibility Rule is also targeted to have final proposed text changes by 02/01/14 with a 07/01/14 implementation date.

As mentioned in last week's status report, version one of the expenditure guidelines are complete and will be posted on the ODDS Provider Tools web page by 01/24/14 with a transmittal to the field going out at the same time.

Timelines were added to the Core Competency work stream regarding the rollout of core competencies. The first task, developing a training curriculum, a delivery strategy for field testing materials and a training roll out plan for all targeted audiences is targeted for completion by 04/30/14 with the final roll out of core competencies, including field training to be completed by 12/30/14.

The process mapping is being revised to incorporate recent updates. The QA review team manager position was closed, candidates are being vetted and interviews will be scheduled with qualified applicants.

QA is occurring on Adult and Children's Needs Assessments (ANA/CNA). Technical Assistance is being provided on specific plans and with specific counties as needs are identified. A statewide QA process for the ANA/CNA is being developed.

Each strategy owner/team having a roadmap/schedule charted toward milestones and targets is still behind schedule. On Monday, January 27th, the K Plan Cross Program team will meet and each strategy owner will be asked to commit to a completion date by which they will have an updated project plan that includes new or revised milestones and targets.

UPCOMING MILESTONES

RESPONSIBLE – MILESTONE	STATUS	DUE DATE	COMPLETED DATE
Each Strategy owner/team has a roadmap/schedule charted towards milestones and targets	Behind Schedule	11/22/13 01/06/14	
Compliance: Updated Draft Exception Process	On Schedule	02/01/14	
Compliance: Finalize Exception Process	On Schedule	03/01/14	
QA/QI: Onboard new QA field review manager	On Schedule	03/01/14	
QA/QI: Jackson CDDP Review Final Report completed within 90 days of review	Complete	12/20/13	1/6/14
QA/QI: Jefferson CDDP Review Final Report completed within 90 days of review	On Schedule	02/21/14	
QA/QI: Reports for all previously reviewed Brokerages are complete	On Schedule	TBD	
QA/QI: Brokerage review schedule will be developed once backlog of field reviews is complete	On Schedule	TBD	

FNAT: In home tool FAQ developed & posted on the web	Complete	12/13/13	1/17/14
FNAT: Initial high level strategy development to complete assessments in the next 60-90 days	Complete	01/06/14	01/15/14
FNAT: Individual CDDP/Brokerage strategies to ODDS to complete assessments within the next 90 days	On Schedule	02/01/14	
FNAT: SIS contracting negotiations/HSRI contracting regarding tool	On hold	TBD	
ISP: Expenditure Guidelines; revised rates under review; incorporating stakeholder comments/feedback for clarity. Version 1 of Expenditure guidelines finalized and distributed to the field	Behind Schedule	01/06/14	
Communication : Develop streamlined process that includes internal staff as well as partners on reviewing AR, PT, IM's and approving, as well as developing best practices	Behind Schedule	12/06/13	
Communication: Draft Brochures (Services Overview for children and adults brochure and children/family brochure)	Complete	12/27/13	01/10/14
Communication: Finalize and distribute brochures	On Schedule	02/07/14	
Communication: FAQ to get kids into K services	Behind Schedule	12/20/13	
LOC: Amend form & instructions	In Process	12/09/13 2/28/14	
OAR's : finalized for 1/1/14	Complete	12/27/13	12/28/13
POC: Pilot Plan of Care (POC) in field beginning 03/01/14	On Schedule	03/01/14	

Work Stream UPDATES

WORKSTREAMS	Compliance <i>Strategy Lead: Darlene O'Keefe</i>	On Schedule	<p>Waiver amendments: to be effective February 1, 2014. Submitted November 13, 2013. These include:</p> <ol style="list-style-type: none"> 1. Comp Waiver - adding PETI language, restoring level of care to 1 adaptive 2. Support Services Waiver - adding PETI language, restoring level of care to 1 adaptive 3. Work beginning on the support services waiver renewal 4. Work beginning on comprehensive services waiver updates
	Oregon Administrative Rules (OAR's) <i>Strategy Lead: Acacia McGuire</i>	On Schedule	<p>The team has reviewed CFR's and identified the OAR's that will need updating and alignment by July 1, 2014. The Complaint and Hearings Rule Advisory Committee met on January 15th to review proposed changes to the rule and to review other DD 411 rules which may also require changes to reflect the central Complaint and Hearing Rule. This rule will have final proposed text February 1, 2014 for a July 1, 2014 implementation date.</p> <p>The Eligibility OAR (411-320-0080) is in draft process with Rule Advisory Meetings in additional meetings scheduled in January. There will be proposed text sent to the Rule Advisory Committee early this week for review prior to the January 24th meeting. It is anticipated that final draft text will be submitted February 1, 2014 for a July 1, 2014 implementation date.</p>

<p>Functional Needs Assessment (FNAT) <i>Strategy Lead: Kristine Duffy</i></p>	<p>On Schedule</p>	<p>The team continues to gather data from the field that will help determine strategies to get the needs assessments completed in the field within the next 60-90 days. A draft plan was completed as of 01/15/14.</p> <p>Based on completion of the initial high level strategy for completion of the needs assessments, a new milestone has been added. Individual CDDPs/Brokerages will receive a breakdown of needs assessments that need to be completed within the next 90 days by 01/22/14. They are being asked to validate the information they receive is aligned with what they have; how they plan to complete the assessments within the next 90 days; and if they cannot, what support or additional resources they will need in order to complete them. The target to have these plans communicated to ODDS is 02/01/14.</p> <p>The FAQ and ANA/CNA integration guidance were published via transmittal on 01/17/14 and is now a completed milestone.</p> <p>The ANA/CNA Manual draft will be completed by January 31. The Complex Medical & Behavior documents, above, will be incorporated into the corresponding sections of the Manual, and the FAQ & Best Practices will be included as appendices.</p> <p>The team has determined that the issues people encountered using the assessment tools were related to MS Excel version compatibility and not bugs in the tool. The team has developed procedures and identified potential patches to prevent these issues. Communication will go out to the field by January 31st. In the meantime, issues have been addressed as reported.</p>
<p>Level of Care (LOC) <i>Strategy Lead: Acacia McGuire</i></p>	<p>On Schedule</p>	<p>The amended Level of Care form has been reviewed internally and the field has also used and reviewed the form. The upcoming rule changes in 2014 will require another amendment to the form. The Steering team agreed it would be best to postpone releasing the amended form until the rule changes can be incorporated in an effort to mitigate confusion to the field with multiple form releases. The release date for the amended LOC form is now scheduled for late February.</p> <p>A transmittal regarding keeping LOC active is still in draft process. The plan is to focus this AR on individuals who are currently on the waiver or k-plan. This transmittal is anticipated out by February 7, 2014.</p> <p>The AR regarding the enrollment date for the LOC has been revised due to information regarding the waiver and k plan. An AR regarding LOC enrollment is in draft process and will be released as soon as possible with other enrollment information. This AR will likely have an effective date one month from the issue date to allow time for this change to occur. .</p>
<p>Individual Support Plan (ISP) <i>Strategy Lead: Marilee Bell</i></p>	<p>On Schedule</p>	<p>All meetings have occurred as scheduled.</p> <p>Group has developed a draft "One" ISP format. Implementation target date is: July '14</p> <p>A services and funding page is being drafted to help existing ISPs meet K Plan requirements. A request to select stakeholders for review and feedback will be made by the end of next week.</p> <p>Version 1 of the expenditure guidelines was finalized and will be posted on the ODDS Provider Tools page for use by 1/24/14</p>
<p>Plan of Care (POC) <i>Strategy Lead: Julie Harrison</i></p>	<p>Schedule under development</p>	<p>Discussions with the Home Care Commission and SEIU are still occurring. Currently, a draft timeline is being developed which will re-set the current timelines targeting a July 1, 2014 effective date. This plan will be reviewed on a regular basis with SEIU.</p>
<p>Quality Improvement <i>Strategy Lead: Brent Watkins</i></p>	<p>Behind Schedule</p>	<p>The CDDP reviews are currently on schedule. The only outstanding CDDP review report at this point is Jefferson County/Best Care, which is in process, but not due for completion until 2/21/14.</p> <p>There are currently 10 outstanding Brokerage review reports to be written. The team is now working to address the backlog of Brokerage review reports. A</p>

		<p>schedule for completion will be created by 01/24/14, after which, a schedule for the annual brokerage reviews will be developed.</p> <p>The QA review team manager position has closed and interviews are yet to be scheduled.</p> <p>We are currently providing QA on ANA/CNA's where significant inconsistencies are found from one section to another and rates that are unusually high or low. Where they exist, we are working with the specific CDDP to provide TA to resolve the issue. A plan is being developed to do a statewide QA of assessments and provide TA to CDDPs through that process. This statewide QA will allow us to develop a process to ensure assessments are administered consistently and aligned with the training provided as well as being consistent with the documentation that accompanies the completed assessment. The schedule for statewide rollout is still under review.</p>
<p>Core Competencies Strategy Lead: Marilee Bell</p>	<p>On Schedule</p>	<p>Core competencies for residential and employment providers; service coordinators and personal agents are established. Working on training modules per competency and testing with The Learning Center.</p> <p>ODDS has contracted with Oregon Technical Assistance Corporation (OTAC) to lead the Core Competency project with input from a wide range of stakeholders, and in compliance with contract expectations. General scope for work to be completed and timelines are described below:</p> <p>04/30/14: A training curriculum, a delivery strategy for field testing materials and a training roll out plan for all targeted audiences will be developed. The training curriculum content will focus on discrete core responsibilities and be based on values and strategies inherent in person-centered thinking practices.</p> <p>07/31/14: Field tests of identified competencies with the designated target audience will have occurred; materials will have been updated according to findings; promising practices will be incorporated into the curricula materials and delivery strategies; training materials using progressive technological means will be made available; and a system for broad communication about available training materials will be made available.</p> <p>12/30/14: The roll out of the core competencies shall be completed, including training to the field on expectations and use of core comp training; tracking system shall be fine-tuned to include: employees participation in training, training topic, date of training and achieving of competency; provision of training to supervisors; reports for DHS defined and built.</p> <p>*Interested stakeholders are encouraged to sign up to receive email updates from OTAC about the development of the project— www.OTAC.org</p>
<p>Communication Strategy: Strategy Owner/Lead: Nelsa Brodie</p>	<p>Behind Schedule</p>	<p>The Service Overview brochure has received final edits, been shared with OHA and DHS waiver unit and will be ready for print prior to January 31st. The children/family brochure has vetted by stakeholders and feedback has been received from OHA and DHS waiver unit. The target date for printing is also January 31st.</p> <p>A draft communication map along with a " RACI" (Responsible, Accountable, Consulting and Informing)chart are in development that will propose a streamlined communication process on information throughout the program as well as transmittal vetting.</p> <p>An FAQ for how to get kids into K services is in development and internal review. There continues to be discussion and clarification on policy issues and we are working on clarifying those areas.</p> <p>A Review of the K Plan web page and break down into sections specific for staff and sections specific for families has started, but no proposals have been made at this time.</p>