

Oregon Developmental Disabilities Services

STATUS REPORT

Office of Developmental Disability Services

Date: February 18, 2014

Project Owner: Trisha Baxter

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

Cross Program Team Leads: Marilee Bell, Kristine Duffy, Julie Harrison, Darlene O’Keeffe, Bruce Baker, Mike Parr, Brent Watkins, Nelsa Brodie, Dana Hittle, Acacia McGuire, Renee Shippey, Sherri Yoakum

Overall project status:

July	Aug	Sep	Oct	Nov	Dec	Jan '14	Feb	Mar	Apr	May	Jun
G	G	Y	G	G	Y	G	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	Timelines added to the POC and Fair Hearing work streams.

Executive update:

At this time, the majority of the project work streams are on schedule and the overall project is trending green, with few target deadlines due this last week.

Several of the individual project plans from each work stream lead have been updated. We asked that the remainder be submitted by Friday, February 21st. Once all are received, the overall project plan will be updated. Included in those submitted were schedules for Plan of Care (POC) and Fair Hearings; these had previously been noted as “schedules under development.”

POC has a lot of dependencies which affect the timing of tasks. As a result, the schedule has fallen slightly behind schedule. Specifically, the training for pilot participants and the subsequent pilot have revised target dates. They had previously been targeted to take place beginning March 1 and are now scheduled to begin on or about March 17.

Additional stakeholder feedback on the service brochures has been finalized and the revisions are being sent to DHS publications so we can obtain an estimate for the cost of translation and printing. We are working on a final draft of the communication process in preparation for a review with internal stakeholders. The draft process map/flowchart describing service eligibility was completed on schedule and is now being reviewed by OHA, DHS waiver team, and ODDS management in preparation of its release to the field.

ODDS staff met last week to review the existing Notification of Planned Action forms. Revisions have begun to consolidate the two forms as well as add categories to capture voluntary reduction of services and voluntary closure of services.

Milestones completed this week included, the creation of a strategy to get the backlogged Brokerage reviews completed and the completion of the draft ANA/CNA manual. Additionally, a new milestone was added for POC regarding the pilot training of the participating CDDP and brokerage.

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: Internal Exception Process	Complete	02/01/14	02/01/14
Compliance: External Exception Process Update Completed	On Schedule	03/01/14	
QA/QI: Onboard new QA field review manager	On Schedule	03/01/14	
QA/QI: Jefferson CDDP Review Final Report completed within 90 days of review	On Schedule	02/21/14	
QA/QI: Schedule for completion of reports for all previously reviewed Brokerages is complete	Complete	02/18/14	02/18/14

FNAT: Individual CDDP/Brokerage strategies to ODDS to complete assessments within the next 90 days	Complete	02/01/14	2/14/14
FNAT: One tool stakeholder group completes recommendations.	On Schedule	03/01/14	
FNAT: Draft of ANA/CNA Manual	Complete	01/31/14	02/14/14
FNAT: Published ANA/CNA Manual for field use	On Schedule	03/07/14	
ISP: Expenditure Guidelines; revised rates under review; incorporating stakeholder comments/feedback for clarity. Version 1 of Expenditure guidelines finalized and posted to the internet.	Complete	01/06/14	02/13/14
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: Finalize and distribute brochures	Complete	02/07/14	01/30/14
Communication: FAQ to get kids into K services	Complete	12/20/13	01/28/14
LOC: Amend form & instructions	In Process	12/09/13 2/28/14	
POC: Train Pilot Plan of Care (POC) participant CDDPs	Behind Schedule	02/28/14 03/07/14	
POC: Pilot Plan of Care (POC) in field beginning 03/01/14	Behind Schedule	03/01/14 04/01/14	
Contracts: CDDP amendment to the Counties	On Schedule	02/14/14	
Contracts: Decisions on remaining contracts, solicitations or amendments	On Schedule	02/28/14	
Contracts: Brokerage amendment to brokerages	On Schedule	03/07/14	

Work Stream UPDATES

WORKSTREAMS	Compliance <i>Strategy Lead: Darlene O'Keeffe</i>	On Schedule	<p>Waiver amendment updates: Work continues on the support services, children's behavioral and medically fragile children's waiver renewals and the comprehensive services amendments for July 1 implementation.</p> <p>The Exceptions committee is working on processes and criteria for each type of exception. The secure e-mail box has been established for submission of exception requests. The requests are now being submitted through the e-mail box (ODDS.Exceptions@state.or.us) by ODDS staff processing the requests and will be utilized by the field for exception requests beginning immediately as transmittals are distributed for specific topics. A list of types of exceptions is being created to determine the work needed for development of processes and the timelines. An Exception Request Form will be created and is expected to be completed for implementation March 1, 2014 when the mailbox will be utilized by the field for most requests.</p>
	Oregon Administrative Rules (OAR's) <i>Strategy Lead: Acacia McGuire</i>	On Schedule	The Eligibility OAR (411-320-0080) and Complaint OAR (OAR 411-318) are on track for a 07/01/14 implementation. Based on feedback from the Rules Advisory Committee (RAC), the Eligibility Rule has been edited and distributed to the RAC for final revisions/comments due 2-18-14. The Complaint OAR received final comment from the RAC on 2-7-14. The Perm Summaries are in process for both rules at this time. CMS to review the Eligibility Rule as soon as final draft is complete.

<p>Functional Needs Assessment (FNAT) <i>Strategy Lead: Kristine Duffy</i></p>	<p>Behind Schedule</p>	<p>Requests were sent to CDDPs on Friday, February 7, regarding the status of completed ANAs and CNAs. 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 all of these plans communicated to ODDS was originally 02/01/14, but due to data inconsistencies, this work is behind schedule. ODDS is assessing internal capacity should the need arise to assist in the effort. Reports received from CDDPs to date have indicated that they are either current now, or will be able to be current without additional resources from the department.</p> <p>The draft of the ANA/CNA manual was completed by the adjusted target date of 02/14/14 and is now being reviewed by OHA, the DHS waiver unit and the ODDS management team. The final version is expected to be ready for publication to the field via transmittal by March 7th.</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. The amended target to have communication go out to the field is February 19. 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 (LOC) 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 was to focus this AR on individuals who are currently on the waiver or k-plan. As this AR has transformed it now focuses on waiver and k-plan service requirements. The goal is to have it for internal review next week and to the field by 3-1-14.</p> <p>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>Piloting of the Career Development plan within the new ISP is underway. A decision to delay the roll out of the new ISP has been made, due to the workload implications of all other required tasks. A new roll out strategy is being developed for management approval.</p>
<p>Plan of Care (POC) <i>Strategy Lead: Julie Harrison</i></p>	<p>Behind Schedule</p>	<p>A detailed project plan for POC with more specific milestone targets was submitted last week. The specifics of the plan will be added to the overall project plan document.</p> <p>The POC specific communications plan is in rough draft. This is meant to be an internal working document about how and to whom specific information will be communicated.</p> <p>Meetings for POC training plan were initially scheduled to begin in February, but are now being pushed back to the week ending March 7th.</p> <p>POC Pilot target start date was originally anticipated to begin 03/01/14. The scheduled eXPRS release on Feb 6th did not occur as scheduled. The pilot is now targeted to begin by 3/17/14.</p> <p>Ongoing status reports will be reviewed with SEIU. A letter of agreement with SEIU extending the POC implementation to 07/01/14 was signed on 02/10/14.</p>

<p>Quality Improvement <i>Strategy Lead: Brent Watkins</i></p>	<p>On Schedule</p>	<p>The CDDP reviews are still 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>The team has met regarding the completion of the brokerage review reports and now has a target date of 06/01/14 for the completion of all outstanding reviews. The work stream lead will periodically check in on progress to ensure the schedule does not slip.</p> <p>Darlene O’Keeffe accepted the position as the QA manager and begins at the end of this week.</p> <p>We continue to provide QA on ANA/CNAs where significant inconsistencies are found from one section to another and rates that are unusually high or low, or when requested by a CDDP or a brokerage. 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.</p>
<p>Training <i>Strategy Lead: Marilee Bell</i></p>	<p>On Schedule</p>	<p>This is a new work stream to report on the various training activities identified in other work stream areas and recognize the training needs and potential delivery strategies outside of those identified in this document. This work stream should help ensure that the correct resources are committed to a coordinated training effort and ensure that delivery is appropriate and timely. Because not all of the participants were available for the February 10th meeting, due to inclement weather issues, it is now scheduled to take place on Friday, February 28th. The delay of the initial meeting will not have an impact on the coordination work. More detail for this work stream should be available following that meeting.</p> <p>Core Competencies, which had previously been its own work stream has now been folded into the training work stream. 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>Communication Strategy: <i>Strategy Owner/Lead: Nelsa Brodie</i></p>	<p>On Schedule</p>	<p>The Service Overview brochure and the children/family brochure were completed, but we are incorporating some additional feedback while we wait for the cost estimate for translation and additional printing.</p>

			<p>A communication map and “RACI” (Responsible, Accountable, Consulting and Informing) chart are in development. This chart will have three purposes: proposing a transmittal vetting process, a more efficient communications process to ensure information sharing throughout the program, and a review of current standing meetings. It was presented to the K-Plan Steering committee, on 01/27/14. The next step is to incorporate the feedback, create a final draft, review with internal stakeholders, and train on the process. A training date will be determined once the final document is approved.</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. <u>ON SCHEDULE AS PART OF AGENCY WIDE WEB PAGE AUDIT/REVIEW.</u> Additionally, the FAQs currently on the page will be reviewed and amended to reflect the most current information. They will be sent to a group to review.</p> <p>The first monthly message designed for families and self-advocates addressing their specific questions went out last week. We are also continuing weekly messages to stakeholders and the field with news and updates that accompany status reports</p> <p>The process map/flowchart describing service eligibility, or more specifically, the workflow for new enrollments into I/DD, was completed on 02/11/14 and is now being circulated for feedback and refinement.</p>
	<p>Contracts Administration: <i>Contracts Owner/Lead:</i> <i>Renee Shippey</i></p>	<p>On Schedule</p>	<p>Previously, we reported that the draft CDDP Amendment to add Plan of Care Language and K Plan case management requirements has been drafted and approved by DOJ. It was discussed at the CDDP Program Managers’ meeting on 02/13/14. County counsels were given a few additional days to review and submit comments to ODDS.</p> <p>The re-write of the brokerage amendment to add Plan of Care Language, K Plan language and additional requirements has been redrafted to bring it into alignment with the CDDP Agreement and is currently in final review by internal staff prior to resubmitting to the brokerage director’s for final review.</p> <p>Discussions are occurring regarding other contracts that may need to be solicited or amended to accommodate ongoing K Plan requirements.</p>
	<p>Fair Hearing Compliance: <i>Lead/Sherri Yoakum</i></p>	<p>On Schedule</p>	<p>A detailed project plan for the Fair Hearing work stream with more specific milestone targets was submitted last week. The specifics of the plan will be added to the overall project plan document.</p> <p>ODDS staff met for the first time this week to review the existing Notification of Planned Action forms. There are two versions currently being used; one for services and one for eligibility. Staff have started revisions to consolidate the two forms as well as add categories of capturing voluntary reduction of services and voluntary closure of services. Revisions and forms are still being worked on.</p> <p>With this change, ODDS will need to provide worker guides, manuals, and training to the ODDS field structure. In addition, we will need to potentially provide training to the APD Hearings Representatives. A more detailed schedule of how and when these tasks will be completed will be coming in subsequent weeks.</p>