

Oregon Developmental Disabilities Services

STATUS REPORT

Office of Developmental Disability Services

Date: April 15, 2014

Project Owner: Trisha Baxter

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Overall project status:

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

Dashboard status:

SCHEDULE	G	High-level roadmap or Gantt chart showing how strategies unfold over time, leading to milestones and targets
SCOPE	G	Scope has been identified.
RESOURCES	G	Strategy owners have validated and added additional information about adequate resources
CHANGES	G	Added new POC and Contract Administration milestones have been added

Executive update:

At this time, the majority of the project work streams are on schedule and the overall project is trending green. Prioritization of the assessment backlog is starting to impact some of our milestone targets, however.

Some highlights for this week’s status report include:

The submission date for the Corrective Action Plan (CAP) for the four waivers is currently staggered. OHA has proposed to CMS that DHS be allowed to submit all CAPs on May 27, 2014, we are awaiting their response.

All of the DD Oregon Administrative Rules (OAR) will be filed as temporary emergency changes effective July 1, 2014. The temporary rule amendments are being filed in order to capture Fair Hearings/due process updates as well as the development of a new DD Complaint rule.

CNA version a.2 release, scheduled for April 11th, did not occur. We are now targeting the end of April for the release.

Personal Support Workers (PSWs) training will begin by 4/22/14. This will initially be a basic training that focuses on how to become a Medicaid provider, necessary forms to complete, etc. Contracting for the use of single FI for POC implementation is in process is targeted to be in place 05/01/14

The QA project plan was not submitted to management for review on April 11th as planned. It is now targeted to be shared with them by 4/25/14. The backlog of Brokerage review reports has had to be re-prioritized to accommodate work on the assessment backlog. This work stream is now trending yellow.

The Assistive Technology Discussion Tool is available for stakeholder review. A webinar introducing the tool was held on April 9, and approximately 140 people participated.

Under the communications work stream, we are awaiting the printed brochures so we can do an initial distribution; Revision work begins 4/15/14 on the ODDS web pages.

The Dept. of Justice (DOJ) has reviewed the CDDP contract amendment. DOJ comments will be combined with the ODDS review and submitted to the county attorneys by noon on 4/15/14. The discussion at the Brokerage Directors meeting resulted in a few additional changes to the amendment. The amendment will then be sent to DOJ for final review. Work to transition Umatilla CDDP back to the County and information about Douglas CDDP giving notice on the I/DD program are included in the work stream this week. A milestone was added regarding the Umatilla CDDP transition.

An appointment has been made with the forms developer for end of May to make requested changes to the current Notification of Planned Action (SDS 0947) for a July 1, 2014, roll out. ODDS staff have a meeting with the DHS/OHA web designer to start discussions on having a website that specifically addresses Complaints and Fair Hearings.

UPCOMING MILESTONES

RESPONSIBLE – MILESTONE	STATUS	DUE DATE	COMPLETED DATE
Compliance: Corrective Action Plan (CAP) due to CMS for Behavioral Model children’s waiver	On Schedule	05/08/14	
Compliance: CAP due to CMS for Medically Fragile children’s waiver	On Schedule	05/15/14	
Compliance: CAP due to CMS for Support Services waiver	On Schedule	05/27/14	
Compliance: Final CAP due to CMS for Comprehensive Services waiver	On Schedule	06/30/14	
Compliance: Submit Medically Involved Children’s Waiver (MIW) evidence package to CMS	On Schedule	04/30/14	
FNAT: Revisions to the CNA to address scoring for young children (0-4 yrs. old)	On Schedule	05/16/14	
FNAT: ANA catch up of backlogged assessments	On Schedule	06/30/14	
FNAT: Complete research on the assessment tool recommended to be the “one tool” for all service settings and final decision on tool implementation	On Schedule	4/30/14	
ISP: Conclude small pilot with SCs/PAs representing the various service settings	On Schedule	04/15/14	
ISP: Compile findings of small pilot; make recommendations prior to launch of the formal field test	On Schedule	04/30/14	
POC: Begin initial basic training with PSWs	On Schedule	04/22/14	
POC: Begin training with CDDPs and Brokerages on entering plans POC	On Schedule	04/24/14	
POC: Contracting for the use of the single FI for POC implementation	On Schedule	05/01/14	
QA: Create a QA strategic plan	Behind Schedule	04/11/14	
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	Complete	12/06/13	3/28/14
Communication: Finalize communication process flow and train ODDS staff on the process	On Schedule	4/30/14	
LOC: Release date of amended form & instructions	On Schedule	04/30/14	
Contracts: CDDP amendment to the Counties	Behind Schedule	02/14/14	
Contracts: Transition management of Umatilla CDDP back to Umatilla county.	On Schedule	07/01/14	
Service Access: External Exception Process Update Completed	Complete	03/01/14	03/28/14

Work Stream UPDATES

<p>CMS Compliance <i>Strategy Lead: Joli Schroader</i></p>	<p>On Schedule</p>	<p><u>Waiver amendment/renewal updates:</u> CMS requested that all of our HCBS waivers be pulled back and resubmitted after allowing for a 30 day public notice and comment period on the HCBS Transition Plan. Waivers will be resubmitted once this step is complete. We still anticipate waivers will be approved for a July 1, 2014 effective date.</p> <p><u>Evidence Report Update:</u> The Medically Involved Children’s waiver review evidence package, covering review period March 1, 2010-February 28, 2014, is due to CMS by April 30, 2014. The program team continues to work on gathering this information for a 04/30/14 submission.</p> <p><u>Corrective Action Plan (CAP) Updates:</u> The Behavioral children’s waiver CAP is due to CMS by 5/8/14. The Medically Fragile children’s waiver CAP is due to CMS by 5/15/14. The Support Services waiver CAP is due to CMS by 5/27/14. The Comprehensive Services waiver final CAP is due to CMS by 6/30/14. ODDS and the Waiver unit are working with a project manager to complete this task. OHA has proposed to CMS to submit all CAPs on May 27, 2014 and are awaiting their response.</p>
<p>Oregon Administrative Rules (OAR’s) <i>Strategy Lead: Acacia McGuire</i></p>	<p>On Schedule</p>	<p>The Eligibility OAR (411-320-0080) and Complaint OAR (OAR 411-318) are on track for a 07/01/14 implementation. All feedback from the Rules Advisory Committee (RAC), for both rules has now been received. Final updates and Perm Summaries are in process for both rules at this time. CMS currently has the Eligibility Rule for review.</p> <p>All of the DD Oregon Administrative Rules (OAR) will be filed as temporary emergency changes effective July 1, 2014. The temporary rule amendments are being filed in order to capture the Fair Hearing due process as well as the development of a new DD Complaint rule. Additionally, the employment and support services rules are being amended in order to comply with the Governor’s Executive Order No. 13-04.</p> <p>The first Legislative Concept Meeting regarding the current statutory definition of “other developmental disability” was held 3-27-14 and the next is scheduled for April.</p>
<p>Functional Needs Assessment (FNAT) <i>Strategy Lead: Kristine Duffy</i></p>	<p>On Schedule</p>	<p>Catch-up assessments for brokerage customers are being scheduled and conducted by state, regional, county and brokerage staff. Collaboration between brokerages and external staff continues to go well. As of April 11, state and county staff had completed 167 assessments of 2,063 that need to be completed. We are on track for completion by June 30, 2014.</p> <p>The team has begun review of CNA results for young children in response to assessment survey results. A survey link will be added this week to the ODDS Assessment mailbox auto-reply to collect additional data on CNA results.</p> <p>CNA version a.2, was not released on April 11th. It is now being targeted for the end of April. Version a.2 removes the school year adjustment for children not yet eligible for school and includes minor, positive algorithm adjustments. <i>Version b for both ANA and CNA are scheduled for Mid-May.</i></p> <p>The recommendation of the One Tool stakeholder group was submitted to DHS administration and has been shared with CMS. The team continues to gather additional information about the Connecticut-LON.</p>

<p>Level of Care (LOC) <i>Strategy Lead: Acacia McGuire</i></p>	<p>On Schedule</p>	<p>Additional comments and proposed changes to the Title XIX LOC form are currently being discussed and reviewed. CMS made some suggestions that will require additional clarification to both the LOC Assessment form and instructions. The updated form was sent back to CMS in March, to review proposed changes; we are currently waiting for the CMS response.</p> <p>Feedback from the field has been received on the LOC policy documents and will be reviewed and edits made based on the comments received.</p> <p>Along with the completion of the updated LOC and LOC instructions, it is anticipated that the Technical Guide will be updated and have other policy information regarding when the LOC must be submitted to ODDS, when the LOC expires, etc. It is anticipated this will be released April 30th, though with assessments being prioritized, this date may need to be pushed back.</p>
<p>Individual Support Plan (ISP) <i>Strategy Lead: Marilee Bell</i></p>	<p>On Schedule</p>	<p>The Career Development plan within the new ISP continues to be piloted. The employment and ISP teams are meeting to update one another on findings.</p> <p>A very small trial is being conducted through Oregon Technical Assistance Corporation on the current draft ISP. A cross section of stakeholders is taking a very critical and constructive look at how the draft ISP can be applied to the service setting with which they are most familiar. Some of the feedback we are gathering will allow us to make agreed upon changes prior to the formal field test. The small work group met on 4/9/14 to review findings and make recommendations to the oversight stakeholder group which meets 4/16/14. Adjustments to the draft ISP shall be made prior to the field test orientation May 6th, 7th and 8th.</p> <p>Prior to rolling out the new ISP, an Administrative Rule must be put into place. To coincide with all other rule activity that will be occurring, a January adoption date is anticipated. As a result, this delays the roll out of the new ISP until January 1, 2015.</p> <p>The following dates and activities have been readjusted and set as: April 15th – May 1st - Multiple webinars offered to the I/DD community for a brief overview and update on the new ISP. May 6th, 7th and 8th - a kick off training for SCs, PAs and service providers May 8th and May 12th, evening sessions will be held for family members 5/15-7/30 - Conduct formal field test, with three listening sessions scheduled throughout the field test. 8/1 – 9/30 - Integrate and adjust, based on learning from field test; make decisions where necessary, change processes based on learning 8/26 – 28 - Introduce broad and intimate details of ISP at SC/PA conference 9/1-10/31 - Prepare training materials and final comments for statewide release 11/1/14-12/15/14 - Roll out of regional trainings statewide 1/1/15 – Statewide implementation</p>
<p>Plan of Care (POC) <i>Strategy Lead: Julie Harrison</i></p>	<p>On Schedule</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>Internal meetings for developing the training plan for overall POC implementation are scheduled. We are now targeting the end of April as the date by which training will begin with the CDDPs and Brokerages on how to enter their plans into POC.</p> <p>Personal Support Workers (PSWs) training will begin by 4/22/14. This will initially be a basic training that focuses on how to become a Medicaid provider, necessary forms to complete, etc.</p> <p>Contracting for the use of single FI for POC implementation is in process is targeted to be in place 05/01/14.</p>

		<p>POC In-home provider record creation/load to DHS provider database is approximately 90-95% complete; work continues to finish this task. Implementation of supporting business processes for POC in-home provider management is initiated.</p> <p>Development & testing of POC system functionality continues.</p>
<p>Quality Improvement <i>Strategy Lead: Brent Watkins</i></p>	<p>Behind Schedule</p>	<p>Competing priorities prevented the project plan to be shared with ODDS management. It is anticipated it will be ready to share by the end of next week. A very high level project plan was created that identified some of the major deliverables and some of the higher level tasks associated with each deliverable. We will be able to begin to add dates to the project plan upon completion of the strategic plan.</p> <p>The backlog of Brokerage review reports has had to be re-prioritized to accommodate work on the assessment backlog.</p>
<p>Training <i>Strategy Lead: Marilee Bell</i></p>	<p>On Schedule</p>	<p>The Oregon Employment Learning Network (OELN) is providing two day training on Social Security Benefits and Work Incentives in Pendleton on 5/6/14 – 5/7/14. For information and/or to register, go to: http://events.r20.constantcontact.com/register/event?oeidk=a07e8nc8bt38d977b05&llr=6puwdydab</p> <p>Core Competencies for residential and employment providers, and service coordinators and personal agents are established. Working on training modules per competency and testing with the Learning Center. 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. A no cost extension to the OTAC contract is being proposed, extending the full roll out of the electronic based competencies to March 31, 2015. As a result, the deliverables will be adjusted. This accommodates the delay in the new ISP roll out, and provides opportunity for clarity based on system changes that continue to occur. Details are forthcoming.</p> <p>The Assistive Technology Discussion Tool is available for stakeholder review. The tool is designed to help ISP teams consider: what assistive technology (AT) may be helpful for a person, planning needs to acquire and implement the AT; and how to evaluate effectiveness. The April 9, 2014 webinar introducing the tool was held and approximately 140 people participated. To access the tool, go to oregonisp.org/at where it can be downloaded. We encourage people to try this tool out and provide feedback. We will be collecting comments for the next couple of months, with a planned revision due out in early summer.</p> <p>The Oregon Gathering is scheduled for June 24 and 25, 2014, to be held in Eugene. The planning committee has scheduled meetings to begin in April.</p> <p>The Services Coordinators/Personal Agents conference is scheduled for August 20 and 21st in Corvallis. Additional information will be forthcoming.</p>
<p>Communication Strategy: <i>Strategy Owner/Lead: Brenda Autry</i></p>	<p>On Schedule</p>	<p><u>Service Brochures:</u> The Service Overview brochure and the children/family brochure were completed. We are awaiting the printed materials.</p> <p><u>Internal Communication Process:</u> After a review with internal staff, minor modifications have been made and the document is ready to be utilized. The communication flow document creates accountability for how communication should occur internally.</p> <p><u>Web page redesign:</u> A review of all ODDS web pages has begun and the first of a series of meetings to discuss content revisions will occur on 04/15/14. <u>ON SCHEDULE AS PART OF AGENCY WIDE WEB PAGE AUDIT/REVIEW.</u></p>

<p>Contracts Administration: <i>Contracts Owner/Lead:</i> <i>Renee Shippey</i></p>	<p>Behind Schedule</p>	<p>The Dept. of Justice (DOJ) has reviewed the CDDP contract amendment. DOJ comments will be combined with the ODDS review and submitted to the county attorneys by noon on 4/15/14. Responses will be due back within 10 business days. Once the county attorneys and DOJ have completed their review and made necessary changes, the OHA/DHS contracts unit will finalize the document and submit it to the brokerages for signature.</p> <p>Brokerage Directors comments to the Brokerage amendment have been received and compiled. A new draft of the amendment was shared on April 11th at the Brokerage Director’s meeting. The discussion at the Brokerage Directors meeting has resulted in a few additional changes to the amendment. The amendment will then be sent to DOJ for final review. OHA/DHS contract staff will finalize the document upon receiving DOJ approval and submit to the brokerages for signature.</p> <p><u>CDDP Case Management Contracts:</u> Umatilla CDDP: In April 2009, DHS terminated the I/DD contract between DHS and Umatilla County. At that time, DHS took over management of the program with the intent of transitioning it at a future date. DHS and Umatilla County are currently working to develop a plan to transition the program back to county management, effective July 1, 2014.</p> <p>Douglas CDDP: At the end of March 2014, DHS received from Douglas County, that they would not be continuing to provide I/DD services beyond June 30, 2014. DHS is exploring the options for obtaining a new community provider for these services as of July 1, 2014.</p>
<p>Service Access: <i>Lead/Sherri Yoakum</i></p>	<p>On Schedule</p>	<p>An appointment has been made with the Forms developer for end of May to make requested changes to the current Notification of Planned Action (SDS 0947) for a July 1, 2014 roll out. ODDS staff have a meeting with the DHS/OHA web designer to start discussions on having a website that addresses Complaints and Fair Hearings. ODDS staff have also reached out to the Family Networks requesting assistance on developing a brochure that talks about Complaints and Fair Hearings for individuals and their families.</p> <p><u>New Services process map/flowchart:</u> The process map that is being developed will provide guidance on enrolling individuals into waiver or k-plan services. The map will be a high level overview of the required documents and timelines in order to provide access to services. Feedback has been received and we are now reviewing. Finalization of this is delayed because of assessment prioritization.</p>