

Oregon Developmental Disabilities Services

STATUS REPORT

Office of Developmental Disability Services

Date: June 11, 2014

Project Owner: Trisha Baxter

Steering Team members: Lea Ann Stutheit, Chelas Kronenberg, Eleshia Ledridge, Bruce Baker, Darlene O’Keeffe, Acacia McGuire

Cross Program Team Leads: Marilee Bell, Kristine Duffy, Julie Harrison, Joli Schroader, Bruce Baker, Mike Parr, Brent Watkins, Brenda Autry, Dana Hittle, Chrissy Fuchs, Renee Shippey, Sherri Yoakum

Overall project status:

July'13	Aug	Sep	Oct	Nov	Dec	Jan '14	Feb	Mar	Apr	May	Jun
G	G	Y	G	G	Y	G	G	G	G	G	Y

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	Y	revised FNAT & POC milestones & change of overall work streams from Green to Yellow

Executive update:

Project status for this week is yellow, but some of the upcoming milestones should change that quickly. The FNAT work stream has added a milestone related to the interim tier changes for SNAP, which is scheduled to be in place by the end of the month. FNAT is also on schedule for completing the assessment backlog by June 30, 2014

Some highlights for this week’s status report include:

Under the OAR work stream, temporary rules will be filed by July 1, 2014.

The FNAT work stream is on schedule for completion of research on the assessment tool and final decision on tool implementation.

Registration for the Oregon Gathering on June 24th & 25th is open through the DHS Learning Center.

The QA work stream is compiling data so the report of the Umatilla CDDP follow up can be completed and shared. A correction and remediation strategy will be developed and sent with the report.

Under the Service Access work stream, staff received feedback from the Communicating with Families and Self-Advocates Group for the Complaints website content. They are in the process of reviewing and incorporating feedback to share with the DHS/OHA Website Developer for implementation.

Transmittals this week: CHIP Medicaid services and DD k-plan and waiver eligibility
Adult Needs Assessment-No contact Notification of Planned Action

UPCOMING MILESTONES

RESPONSIBLE – MILESTONE	STATUS	DUE DATE	COMPLETED DATE
Compliance: Corrective Action Plan (CAP) due to CMS for Behavioral Model children’s waiver; Medically Fragile children’s waiver; Medically Involved Children’s Waiver; Support Services and Comprehensive Services Waivers	Completed	05/27/14	05/27/14
Compliance: Submit Support Services Waiver, Behavioral Model Waiver, and Medically Fragile Children’s Waiver for renewal and Comprehensive Waiver for amendment of employment services. To include transition plan, public comment and waiver CAP changes.	On Schedule	06/15/14	
Compliance: Comprehensive Services waiver amendment for 6% employment services rate increase submitted to CMS	On Schedule	06/29/14	

OAR: Summary of rule changes and implementation policy to the field	On Schedule	06/20/14	
FNAT: Revisions to the CNA to address scoring for children (0-4 yrs. old) are being delayed and will be combined with 7/1 release	On Schedule	05/16/14 ; 7/1/14	
FNAT: Interim ANA tier assignments and review procedures sent to Brokerages and CDDPs	Behind Schedule	06/06/14 ; 06/13/14	
FNAT: Interim tier assignments and review procedures for individuals with SNAPs sent to Brokerages and CDDPs	On Schedule	6/30/2014	
FNAT: ANA catch up of backlogged assessments	On Schedule	06/30/14	
FNAT: Addition of assessment questions to address skills training for social interaction	On Schedule	07/01/14	
FNAT: Complete research on the assessment tool recommended to be the "one tool" for all service settings and final decision on tool implementation	Behind Schedule	4/30/14 ; 5/30/14 ; 06/30/14	
ISP: Conduct and conclude field test with Services Coordinators, Personal Agents, and individuals residing in each service setting.	On Schedule	07/30/14	
POC: Agency provided Employment/Day services moved into POC	Behind Schedule	07/01/14 ; 09/01/14	
POC: Contracting for the use of the single FI for POC implementation	Behind Schedule	6/30/14	
QA: Develop a statistically valid sample standard that will be used for field reviews of CDDPs and Brokerages	On Schedule	06/13/14	
QA: Create a QA workgroup and hold first meeting	On Schedule	06/20/14	
QA: Create a 2yr. review schedule that incorporates reviewing each CDDP and Brokerage	On Schedule	06/27/13	
QA: Hire field review personnel	On Schedule	07/1/14	
LOC: Release date of amended form & instructions. Final form will be done by next week.	Behind Schedule	04/30/14 ; 05/30/14	
Service Access: Notice of plans action form implementation	On Schedule	7/1/14	
Contracts: CDDP amendment to the Counties	Behind Schedule	02/14/14	
Contracts: Brokerage amendment to the Brokerages	Behind Schedule	03/21/14	
Contracts: Transition management of Umatilla CDDP back to Umatilla county.	On Schedule	07/01/14 ; 08/01/14	
Contracts: Transition management of Douglas CDDP from Douglas County	On Schedule	07/01/14	
Contracts: Transition management of Columbia CDDP from Columbia County	On Schedule	07/01/14	

Work Stream UPDATES

WORKSTREAMS	CMS Compliance <i>Strategy Lead: Joli Schroader</i>	On Schedule	<p><u>Waiver amendment/renewal updates:</u> No additional updates this week: The public notice regarding the initial HCBS transition plan has been posted. Waivers will be resubmitted no later than June 15, 2014. We still anticipate waivers will be approved for a July 1, 2014 effective date. Tribal notification regarding the employment services rate increase was completed, May 20th. Continuing to prepare for resubmission of the waivers. Two comments were received.</p> <p><u>Corrective Action Plan (CAP) Updates:</u> No additional updates this week: OHA and ODDS finalized the CAP and submitted it to CMS on 5/27/2014.</p>

<p>Oregon Administrative Rules (OAR's) <i>Strategy Lead: Mike Parr</i></p>	<p>On Schedule</p>	<p>Rule Advisory Committee meetings (RACs) are being scheduled on a weekly basis between July and August. Invitations to stakeholders for participation on these RACs will be coming out no later than June 13th.</p> <p>Rule changes were communicated to the "k" Plan Design and Implementation Council on May 30th and will be shared at both the DD Managers meeting and Brokerage Directors meeting later in June. A summary of all programmatic changes will be forthcoming to the field by June 20th as well as an implementation policy to assist the field with compliance of the new program rule changes. Rules will be filed on 7/1/14</p>
<p>Functional Needs Assessment (FNAT) <i>Strategy Lead: Kristine Duffy</i></p>	<p>Behind Schedule</p>	<p>Catch-up assessments for brokerage customers are being scheduled and conducted by state, regional, county and brokerage staff. We are on track for completion by June 30, 2014, and the majority of Central Office staff has returned to Central Office to resume their regularly scheduled work.</p> <p>ANA and CNA version B will be released 7/1/14. Improvements in both tools includes feature to re-align radio buttons and the addition of approved 2:1 support hours on the "Summary of In Home hours" tab. The ANA version B will also include new questions to assess support needed for social interaction and community integration. CNA version B will also include algorithm changes to address scoring concerns for young children, and minor, positive algorithm adjustments for children in all age groups, and remove the school year adjustment for children not yet eligible for school. In the interim, if the individual or family believes the assessed hours are not adequate to meet their needs, a request can be made for an exception to the assessed amount through the Funding Review Committee, as described in AR-APD-14-019.</p> <p>The Interim tier schedule for individuals who have been assessed using the ANA but have not had a SIS will be communicated in transmittal to CDDPs and Brokerages by June 13, 2014. This schedule was previously distributed to Brokerage Directors and CDDP Manager. The interim Tier schedule for individuals who have been assessed using the SNAP will be published by June 30th. Procedures for requesting a secondary review of interim tier assignments will be included in the transmittal.</p> <p>Employment Service rates for individuals previously determined to require Tier 7 supports will be sent to CDDPs and individuals by June 21, 2014. Procedures for requesting a review of the initial Tier 7 rate will be included in the Tier notice.</p> <p>ODDS has received the comparative analysis on the Connecticut Level of Need tool and the Support Intensity Scales (SIS). DHS Administration will review the report and make a decision by the end of the month.</p>
<p>Level of Care (LOC) <i>Strategy Lead: Chrissy Fuchs</i></p>	<p>Behind Schedule</p>	<p>The LOC form has been finalized and we are working on a release date.</p> <p>The waiver and k-plan technical guides have been finalized and we are working internally to get them released.</p>

<p>Individual Support Plan (ISP) <i>Strategy Lead: Marilee Bell</i></p>	<p>On Schedule</p>	<p>Information regarding CDDP and Brokerage training and forums on the Career Development Plan (CDP) will go out to the field this week with the first call in scheduled for June 10th. The CDP is scheduled to roll-out statewide July 1, 2014. This roll-out will include changes based on the input provided during the pilot phase</p> <p>Weekly phone call ins are occurring with field test participants, and great feedback is being collected including but not limited to: suggested changes in formatting; ideas on information gathering that retain previous practices; feedback on the pages that tie between the needs assessment and the funding authority and POC connection. Of particular interest are the dynamics of the "team", specifically the responsibilities of the facilitator and of the paid providers.</p> <p>The following ISP development dates and activities remain: 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>Behind Schedule/ Schedule under revision</p>	<p><u>Implementation Schedule Revision</u> Per communication to stakeholders sent on Fri 5/29, the schedule for POC implementation has been revised. Agency provided employment/day services will be moved to POC starting 9/1/14. Other services will be transitioned to POC at a later date still to be determined.</p> <p><u>CDDP and Brokerage Training</u> “eXPRS Create Plan of Care for CDDPs and Brokerages” was completed. Currently there are 800 POCs created and in draft; 400 POCs with at least one service in accepted status. ODDS is compiling questions received from the training and will be developing an FAQ document.</p> <p><u>Personal Support Worker Training</u> Initial PSW informational/training webinars were completed. Additional training will be scheduled to correspond with the revised implementation schedule.</p> <p><u>Fiscal Intermediary Contracting</u> Due to changing scope, the FI contract is still under negotiation with the identified contractor, but it is still scheduled to be finalized and operationalized by July 1, 2014.</p> <p><u>PSW eXPRS Enrollment</u> POC In-home provider record creation/load to DHS provider database continues. Approx 50% of the anticipated PSW/IC-PSW providers have been successfully enrolled/registered to be utilized for POC. Additional provider types continue to be in the registration/enrollment process.</p>
<p>Quality Improvement <i>Strategy Lead: Brent Watkins</i></p>	<p>On Schedule</p>	<p>The QA team is running sample simulations to ensure that our proposed sample encompasses all of the CDDPs and Brokerages over a 2 year review cycle. Once the final simulation is complete, we will develop and propose a review strategy to OHA.</p> <p>Data is being compiled so that the report of the Umatilla CDDP follow up can be completed and shared. A correction and remediation strategy will be developed and sent as part of the report.</p> <p>Through the course of developing CDDP/Brokerage review questions/measures to give to the Office of Business Intelligence (OBI), we realized that we needed more information from some of the subject matter experts (SME) in some of the different units. We let OBI know we were not prepared to give them a complete set of review questions/measures on June 6th and are working with</p>

		<p>our SMEs to develop review questions/measures. We are targeting a mid-June submission of our review questions/measures to OBI.</p> <p>ODDS staff have started to work on the Brokerage review report backlog with a target to complete one of the reports by the end of June 2014.</p>
<p>Training <i>Strategy Lead: Marilee Bell</i></p>	<p>On Schedule</p>	<p>Stakeholder groups representing Services Coordinators, Personal Agents, Direct Support Professionals and Self advocates has begun vetting of the draft core competencies. Designated staff from ODDS will also be included in the reviews. All curriculum content is anticipated to have been reviewed by July 1, 2014.</p> <p>The curriculum will be in a state of updating through the next several months, as policies are drafted, vetted, clarified and published through ODDS.</p> <p>Upcoming dates include the following: 9/1-9/30 – Loading curriculum into on line learning center 10/1-1/15 – Field test of curriculum for Residential, employment providers; Services Coordinators and Personal Agents 1/15-3/14/15 – Changes incorporated as a result of field test; publish, test and reload into Learning Center 3/15/15 – Statewide implementation</p> <p>A no cost extension to the OTAC contract is being proposed, extending the full roll out of the electronic based competencies to April 30, 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>Registration for the Oregon Gathering is open through the DHS Learning Center. The dates are June 24 and 25. For more information please follow the attached link: http://www.oregon.gov/dhs/DD/rebar/Documents/Mark%20your%20calendar%202014.pdf</p> <p>The Services Coordinators/Personal Agents conference is scheduled for August 20 and 21st in Corvallis. Additional information will be forthcoming.</p> <p>A training schedule will be updated for distribution each month at Community Developmental Disability Program Managers and Brokerage Directors meetings.</p> <p>Additional training updates are included in the ISP and POC work streams related to the Career Development Plan, POC and the new ISP, and POC training for CDDP/Brokerage staff, and PSWs</p>
<p>Communication Strategy: <i>Strategy Owner/Lead: Brenda Autry</i></p>	<p>On Schedule</p>	<p><u>Web page redesign:</u> Initial web content for the redesigned ODDS web pages is scheduled to be submitted to the web team by June, 6th. <u>ON SCHEDULE AS PART OF AGENCY WIDE WEB PAGE AUDIT/REVIEW.</u></p>
<p>Contracts Administration: <i>Contracts Owner/Lead: Renee Shippey</i></p>	<p>Behind Schedule</p>	<p><u>Contract Amendments:</u> The CDDP amendment is closer to being completed. ODDS met with CDDP representatives May 15th to discuss which issues needed to be resolved before the amendment could be signed and which could wait for future discussion. Updated document and decision information was submitted to the county contacts, attorneys and ODDS staff on May 16th. DOJ and DHS received comments from external CDDP staff and attorneys on June 6th. DOJ and ODDS will review the responses in preparation for finalizing the amendment this week.</p> <p>OHA/DHS contract staff met with DOJ and reviewed the brokerage amendment. DOJ has reviewed and ODDS is rewording and will work with DOJ and OHA/DHS staff to finalize language. 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> <u>Umatilla CDDP:</u> DHS and Umatilla county continue to work toward an August 1, 2014 transition date. Umatilla Contract has been drafted and is going to DOJ for review the week of the 9th</p> <p><u>Douglas CDDP:</u> Following an evaluation of submitted proposals, ODDS informed proposers of their intent to award the contract to Community Living Case Management (CLCM). The amendment to CLCM's current contract will be drafted the week of the 9th.</p> <p><u>Columbia CDDP:</u> DHS has drafted an emergency contract for services in Columbia County and it will be submitted to DOJ for review the week of the 9th.</p>
	<p>Service Access: <i>Lead/Sherri Yoakum</i></p>	<p>On Schedule</p>	<p><u>Complaint web page:</u> Received feedback from our ODDS field staff about the revised Notification of Planned Action and now will be reviewing the suggestions and incorporating if appropriate. Once this is done, the Notification of Planned Action will be sent to OFDM with final edits and ready for implementation 07-01-14.</p> <p><u>Complaint Forms:</u> ODDS sent out the newly revised Notification of Planned Action to a CDDP and Brokerage for review and request for suggested edits. Accompanying the new Notification of Planned Action is a detailed instruction sheet that will be a guide to the field staff filling out the notice; this document was also sent to the same CDDP and Brokerage for review. We asked for their feedback and comments to be sent in by June 6, 2014 in order to get the final edited documents back to the forms unit for implementation on July 1, 2014. Received feedback from the Communicating with Families and Self-Advocates Group for the Complaints website content. This will also need to be reviewed and incorporated to provide to the DHS/OHA Website Developer for implementation.”</p> <p><u>New Services process map/flowchart:</u> The draft process map providing guidance on enrolling individuals into waiver or k-plan services is undergoing final review prior to release.</p>