

Oregon Developmental Disabilities Services

STATUS REPORT

Office of Developmental Disability Services

Date: June 24, 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:

Oct '13	Nov	Dec	Jan '14	Feb	Mar	Apr	May	June	July	Aug	Sept
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:

OHA/DHS continues to communicate and collaborate with CMS in conversations to ensure a quality Corrective Action, Quality Assurance and Quality Improvement Plan for the 5 I/DD waivers.

Some highlights for this week’s status report include:

The ReBAR Assessment Team reports that the catch up assessments are 99% complete.

Plan of Care team has created and launched a Facebook page for eXPRS.

ISP Team reports the Stakeholder Advisory group will meet on July 9, 2014.

Transmittals this week: Requests for ReBAR Assessments
 No Assessments In Sheltered Workshops
 HCR Train the Trainer
 DD49 and 151 Signatures
 ANA Version B
 Camp access for summer 2014

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.	Completed	06/15/14	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	Behind Schedule	06/27/14	
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 ; 6/21/14	
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	Complete	06/13/14	06/13/14
QA: Create a QA workgroup and hold first meeting	Behind 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	Behind Schedule	08/01/14	
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: Notification of Plans Action form revision 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.	Schedule to be revised	07/01/14 ; TBD	
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	<p>CMS Compliance <i>Strategy Lead: Joli Schroader</i></p>	<p>On Schedule</p>	<p><u>Waiver amendment/renewal updates:</u> Waivers were submitted on June 15, 2014. We still anticipate waivers will be approved for a July 1, 2014 effective date. Resubmitting 6% employment rate increase to Comp Waiver by the end of the week.</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. Communication is happening between DHS/OHA and CMS regarding CMS verbal comments. DHS and OHA will be working to make revisions to the CAP – no specific due date set.</p> <p>Medically Involved Waiver amendment was posted for public comment on June 23rd.</p>
	<p>Oregon Administrative Rules (OAR's) <i>Strategy Lead: Mike Parr</i></p>	<p>On Schedule</p>	<p>Rule Advisory Committee meetings (RACs) have been scheduled weekly during July and August. Invitations to stakeholders for participation on these RACs have been sent and the RAC rosters are under development.</p> <p>ODDS program staff have nearly completed the rule language changes to the 14 affected sets of program rule. OHA has begun to review the changes.</p> <p>A summary of all programmatic changes will be forthcoming to the field by June 27th as well as an implementation policy to assist the field with compliance of the new program rule changes. These rules will be filed as temporary rules 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 nearing completion. Central Office staff have returned to Central Office to resume their regularly scheduled work. The ReBar Unit is still doing assessments for the Brokerages.</p> <p>ANA and CNA version B will be released 06/27/14 for use beginning 7/1/14. Field testing of the new ANA questions regarding support needed for community integration and social interaction is underway.</p> <p>The team is calculating the impact of CNA version B algorithm changes for previously completed assessments, so that the additional hours can be made available to children who have already been assessed.</p> <p>The Interim tier schedule for individuals who have not yet had a SIS assessment, but have either an ANA or SNAP will be communicated in a single transmittal to be released to the stakeholders for review on 6/21/14. The final transmittal will be released on June 27, 2014.</p> <p>Employment Service rates for individuals previously determined to require Tier 7 supports will be sent to CDDPs and individuals by June 30, 2014. Procedures for requesting a review of the initial Tier 7 rate will be included in the Tier notice.</p> <p>DHS Administration will review the recommendations and make a decision on the “single assessment tool” by the end of June.</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. This work is pending the finalization of service access activities. Will be discussed by mid –July. 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>The ISP field test participants continue to test the draft ISP and the process. The small work group met on Thursday to review proposed changes to date. The Advisory Stakeholder group is scheduled to meet July 9, 2014. 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>eXPRS Communications: A Facebook page for eXPRS has been created & launched and will hopefully assist in the coordinated communication efforts re: eXPRS/POC. eXPRS Facebook page can be found at: https://www.facebook.com/EXPRSpaymentsystem</p> <p><u>POC System Functionality:</u> Plan creation bug fixes are currently being tested in UAT for release soon. Additional POC claims process functionality is being finalized and tested for release.</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 1884 POCs created and in draft status; 68 POCs with at least one service in accepted status. ODDS is compiling questions received from the training and will be developing an FAQ document. A link to hold a POC Identified Issues log and POC FAQs is planned to be added to the eXPRS Help Menu.</p> <p><u>Provider Agency Training:</u> New training dates for late July - Aug have been released & notices of “Save the Date” have been sent to the field. Additional information re: training registration to be sent out in early July.</p> <p><u>Personal Support Worker Training</u> Initial PSW informational/training webinars were completed. Notice sent to PSWs on 6/6/2014 regarding delay of POC implementation for them. 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. Contract was sent to TNT for signature on 6/22/14.</p> <p><u>PSW eXPRS Enrollment</u> POC In-home provider record creation/load to DHS provider database continues. As of 6/23/14 we have approximately 5484 PSW and IC-PSW providers 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>Behind Schedule</p>	<p>The QA unit began work on a biennial statewide review of CDDPs and Brokerages and how it might be accomplished.</p> <p>A draft of the CDDP/Brokerage review questions was completed on June 13th and was distributed to internal subject matter experts (SME), and OHA for feedback and revisions. Once revisions are finalized, the questions will be sent to the Office of Business Intelligence (OBI) so that the online report database can be built.</p> <p>We did not extend invitations to participate in a QA workgroup this week as was to have been complete by June 20th. A draft of possible participants and the invitation has been created and is being reviewed and invitations will be forthcoming in the next couple of weeks.</p> <p>The QA Compliance Specialist position closes on June 23rd. Once it closes, interviews will be scheduled for qualified candidates. Interviews probably won't begin until after July 4th, but we are targeting August 1st as the date by which the first couple of compliance specialists will be hired.</p> <p>The Umatilla County CDDP follow up report was submitted to Umatilla County as well as OHA and CMS. ODDS is working with Umatilla County CDDP to remediate deficiencies identified during the follow up.</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 are vetting draft core competencies.</p> <p>Competencies vetted thus far through the stakeholder group, that pertain to direct support professionals include: Identify methods of support and non-physical intervention to use with all people supported:</p> <ul style="list-style-type: none"> • Demonstrate dignity and respect to all people supported • Understand how to respond to person-to-person or person-to-property incidents by acting to protect the person and others from harm • Demonstrate dignity and respect to all people supported • Use person centered language in all interactions <p>Competencies vetted thus far through the stakeholder group, that pertain to Services Coordinators and Personal Agents include:</p> <ul style="list-style-type: none"> • Have a basic understanding of the system of delivering services funded by the Centers for Medicare and Medicaid Services • Understand resourceful stewardship of public funds and how case management must ultimately answer to the taxpayer • Know the specific forms and/or electronic record-keeping systems that are necessary to complete required documentation. • Understand the case management responsibility to follow confidentiality standards and be able to cite specific examples of situations that are deemed confidentiality violations • Be familiar with the Core Values of the Oregon Department of Human Services; Understand other values within the Oregon I/DD system • Understand the case management role in choice advising • Understand and use person centered language in all interactions <p>Once feedback has been incorporated into curriculum, ODDS staff will have the opportunity to review. The curriculum will continue to be in a state of updating through the next several months, as policies are drafted, vetted, clarified and published through ODDS.</p> <p>Upcoming activities 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;</p>

			<p>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>Mark your calendars for the Services Coordinators/Personal Agents conference in August, at OSU LaSalle Stewart Center on August 21 and 22, 2014. Information will be out soon.</p>
	<p>Communication Strategy: <i>Strategy Owner/Lead:</i> <i>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, 25th. <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><u>Contract Amendments:</u> The County Legal Counsel approved the final template on June 18th with the agreement that some issues were tabled and will be dealt with in the next amendment. DOJ will approve the template and then OC&P will begin the process for submitting to the Counties for signature.</p> <p>DOJ approved the brokerage amendment on June 19th. OC&P sent it to the brokerages for signatures on June 20th.</p> <p><u>CDDP Case Management Contracts:</u></p> <p><u>Umatilla CDDP:</u> DHS and Umatilla county continue to work toward a transition date. Umatilla Contract has been drafted and is with DOJ for review as of June 23rd.</p> <p><u>Douglas CDDP:</u> The amendment was executed June 20, 2014.</p> <p><u>Columbia CDDP:</u> DHS has drafted and received DOJ approval for an emergency contract for services in Columbia County. The contract was sent to the county and Columbia County Mental Health this week.</p>
	<p>Service Access: <i>Lead/Sherri Yoakum</i></p>	<p>On Schedule</p>	<p>Received feedback from our ODDS field staff and other stakeholders about the revised Notification of Planned Action. Accompanying the newly revised Notification of Planned Action form will be a detailed instruction sheet for field staff to assist in filling out the form.</p> <p>ODDS also received Complaint website feedback from the Communicating with Families and Self-Advocates Group. The feedback now needs to be reviewed and final verbiage sent to the DHS/OHA Website Developer for implementation of a new webpage.</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>