

Oregon Developmental Disabilities Services

STATUS REPORT

Office of Developmental Disability Services

Date: July 7, 2014

Project Owner: Trisha Baxter

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

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	Y-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	Addition and deletion of staff as leads/steering members.

Executive update:

In this week’s status report many milestones have been met or are on schedule at this time. Therefore we have updated the status for July as Yellow trending Green. There are quite a few workstreams noting “No changes” and this is primarily because we met the milestones we have been working towards and are in progress of achieving milestones to come. Project Manager is working with the POC workstream leads on identifying any new developments or work plans with milestones that we can add to this report. Next week, the status report will have a slightly different format. This is in an effort to keep us fact based with a clearer line of sight moving towards milestones and overall goals.

Transmittals to be issued on or before 7/11/14:

- **Career Development Plan**
- **Discovery profile**
- **Discovery provider qualifications**

UPCOMING MILESTONES

RESPONSIBLE – MILESTONE	STATUS	DUE DATE	COMPLETED DATE
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	Complete	06/29/14	06/25/14
OAR: Summary of rule changes and implementation policy to the field	Complete	06/27/14	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	Complete	05/16/14	06/30/14
FNAT: Interim ANA tier assignments and review procedures sent to Brokerages and CDDPs	Complete	06/06/14	06/30/4
FNAT: Interim tier assignments and review procedures for individuals with SNAPs sent to Brokerages and CDDPs	Complete	6/30/2014	06/30/14
FNAT: ANA catch up of backlogged assessments	Complete	06/30/14	06/30/14

FNAT: Addition of assessment questions to address skills training for social interaction	Complete	06/30/14	06/30/14
FNAT: Complete research on the assessment tool recommended as the "one tool" for all service settings.	Complete	06/30/14	06/30/14
POC: Contracting for the use of the single FI for POC implementation	Complete	6/30/14	06/30/14
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
Contracts: Brokerage amendment to the Brokerages	Complete	03/21/14	06/20/14
Contracts: CDDP amendment to the Counties	Complete	02/14/14	06/30/14
Contracts: Transition management of Douglas CDDP from Douglas County	Complete	07/01/14	07/01/14
Contracts: Transition management of Columbia CDDP from Columbia County	Complete	07/01/14	07/1/14
Service Access: Notification of Plans Action form revised. published on forms websight	On Schedule	7/15/14	
ISP: Conduct and conclude field test with Services Coordinators, Personal Agents, and individuals residing in each service setting.	On Schedule	07/30/14	
FNAT: Assessment project going through a quality assurance review	On schedule	07/30/14	
FNAT: Final program decision on tool	On Schedule	07/15/14	
QA: Create a QA workgroup and hold first meeting	On Schedule	06/20/14 08/01/14	
QA: Create a 2yr. review schedule that incorporates reviewing each CDDP and Brokerage	On Schedule	06/27/14 08/01/14	
QA: Hire field review personnel	On Schedule	08/01/14	
LOC: Release date of amended form & instructions.	Behind Schedule	04/30/14 ; 05/30/14	
POC: Agency provided Employment/Day services moved into POC	Schedule in revision	07/01/14 ; 09/01/14	
Contracts: Transition management of Umatilla CDDP back to Umatilla county.	Schedule to be revised	07/01/14 ; TBD	

Work Stream UPDATES

WORKSTREAMS	CMS Compliance Strategy Lead: Joli Schroeder	On Schedule	<p><u>No changes this reporting period.</u></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. The 6% employment rate increase to Comp Waiver was submitted June 25, 2014. This is a retroactive request to accommodate the increase implemented in March. The Medically Involved Waiver amendment was posted for public comment on June 23rd.</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. CMS sent a template for an example format that would like to see. The Waiver Unit is working to reformat the CAP for DHS and OHA to review and to add additional information.</p>
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	<p>Oregon Administrative Rules (OAR's) <i>Strategy Lead: Mike Parr</i></p>	<p>On Schedule</p>	<p><u>No changes this reporting period.</u></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>A summary of all programmatic changes was sent to the field on June 27th. The rules impacted by changes to the supports waiver and comprehensive waiver were filed as temporary rules on 7/1/14. OARs related to the children's waivers will be filed no later than 8/1/14. All are scheduled for permanent filing effective 1/1/15.</p>
	<p>Functional Needs Assessment (FNAT) <i>Strategy Lead: Kristine Duffy</i></p>	<p>Behind Schedule</p>	<p>Catch-up assessments for brokerage customers have been completed. The team will be preparing a list of enrolled individuals receiving in-home supports for whom ODDS did not receive an up-loadable ANA. Each brokerage and CDDP will receive their list by July 30th.</p> <p>DHS Administration is reviewing the recommendations for the "one tool" and make a decision on the single assessment tool approach by mid-July.</p>
	<p>Level of Care (LOC) <i>Strategy Lead: Chrissy Fuchs</i></p>	<p>Behind Schedule</p>	<p><u>No changes this reporting period.</u></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.</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><u>No changes this reporting period.</u></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:</p> <p>5/15-7/30 - Conduct formal field test, with three listening sessions scheduled throughout the field test.</p> <p>8/1 – 9/30 - Integrate and adjust, based on learning from field test; make decisions where necessary, change processes based on learning</p> <p>8/26 – 28 - Introduce broad and intimate details of ISP at SC/PA conference</p> <p>9/1-10/31 - Prepare training materials and final comments for statewide release</p> <p>11/1/14-12/15/14 - Roll out of regional trainings statewide</p> <p>1/1/15 – Statewide implementation</p>
	<p>Plan of Care (POC) <i>Strategy Lead: Chet Lundy & Julie Harrison</i></p>	<p>Behind Schedule/ Schedule under revision</p>	<p>eXPRS Communications:</p> <p>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: <u>https://www.facebook.com/EXPRSpaymentsystem</u></p> <p><u>POC System Functionality:</u></p> <p>eXPRS/POC release completed on 6/26, however there are still issues to be resolved. POC access for CDDP/Brokerage users has been suspended temporarily until those remaining issues are resolved & deployed to production.</p> <p><u>Implementation Schedule Revision</u></p> <p>Per communication to stakeholders sent on Fri 5/29, the schedule for POC implementation is being 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. Work continues on the project plan for the remaining work.</p> <p><u>CDDP and Brokerage Training</u></p> <p>"eXPRS Create Plan of Care for CDDPs and Brokerages" was completed.</p>

		<p>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>Fiscal Intermediary Contracting</u> Contracting process has been completed. Communication sent via email & Facebook to PSW/IC-PSW providers on 6/27/14 regarding the 7/1 implementation of single FI payment structure and work needed to get transitioned to that single FI.</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>On Schedule</p>	<p>The revision of the review questions will be completed early this week and will be sent to internal stakeholders and OHA for additional comment.</p> <p>Depending on schedule availability, interviews for the first two compliance specialist positions will be scheduled within the next two weeks.</p> <p>Part of the ODDS management team will be in Pendleton this week working with Umatilla County CDDP on transition activities in preparation of the program being turned over to Umatilla County</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><u>SC/PA competencies:</u> vetted with stake holders this last week included: Cultural sensitivity; Monitoring; Understanding case management responsibilities when providers are not meeting expectations; Integrity of work from assessment through planning and delivery of services; understanding key differences in various types of legal guardianships and specific scopes of authority over an individual choice; respecting choice and offering alternatives to risky behaviors; what does informed consent mean and a case managers role in obtaining it.</p> <p><u>DSP competencies:</u> vetted with stakeholders this last week included: Demonstrate understanding of common, serious health risks; how to identify and respond to non- emergency changes in health; describe mission and value statement of the organization. How does one’s day to day work support the organizations values and mission; demonstrate knowledge of personal preferences of each person supported; understanding importance of self-determination and personal responsibility; identify when an incident is required and time lines for completion.</p> <p>ODDS staff are providing ongoing review of the curriculum.</p> <p>Upcoming activities related to Core competencies 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>Two discrete set of employment forums are occurring;</p> <ul style="list-style-type: none"> • One specific to Services Coordinators and Personal Agents, focusing on helping SC/PA’s better understand their role and responsibilities in the Employment First Initiative and Executive Order. Specifically talking about SC/PA roles, having employment conversations which lead to rich career development plans; and writing great employment goals. This training is being provided by Wise (Washington Initiative for Supported Employment) • The other forums are titled: Supported Employment for VR and DD Staff and focuses on the collaboration between the two in promoting employment for people with I/DD. <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> Web content has been submitted to the group working on web redesign and the incorporation of the submitted materials is being built into the agency wide efforts.</p>
<p>Contracts Administration: <i>Contracts Owner/Lead:</i> <i>Renee Shippey</i></p>	<p>On 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 approved the template and OC&P is preparing the amendments have been sent to the counties.</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. Contract has been drafted and is with DOJ for review as of June 23rd. Will resume contract procedures when transition date confirmed.</p>
<p>Service Access: <i>Lead/Sherri Yoakum</i></p>	<p>On Schedule</p>	<p>ODDS submitted final edits to OFDM early on 06/30/14 and now waiting for the newly revised form to replace the existing on the DHS Forms webpage.</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>As an FYI, next Monday is the leads last day. The unit supervisor will fill in during the interim.</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>