

**STATUS REPORT**

**Office of Developmental Disability Services**

Date: December 2, 2014

Project Owners: Lilia Teninty and Don Erickson

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

Cross Program Team Leads: Marilee Bell, Kristine Duffy, Julie Harrison, Joli Schroader, Mike Parr, Brent Watkins, Brenda Autry, Dana Hittle, Renee Shippey, Tracy Wilder, Jeannette Baxter

**Overall project status:**

Apr 14	May 14	Jun 14	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15
G	G	Y	G	G	G	G	G	G				

(Overall project status determined by averaging the status of the strategies and work streams that are listed below.)

**Executive Summary:**

**Transmittals:**

DD 56 Standards and Procedures	
ReBAR Implementation Date for DD50, Renewal DD50 and Mandated Caseload Service Elements	
Correction to Notification of Rights	
Consultant Provider Enrollment Agreement- Update & Extension	

**Work stream Updates**

	Work stream/Lead	Current Status	Status Update	Upcoming Major Milestones
Work streams	CMS Compliance Strategy Lead: Joli Schroader	Green	<p><b>Previous Status: Green / Trending: ↔</b></p> <p><b>Accomplishments in the last 2 weeks?</b></p> <ul style="list-style-type: none"> <li>0117, 0375, 40193, 40194 waivers re-submitted to CMS on 11/24/14, along with RAI responses and summary of public comments.</li> </ul> <p><b>Activities planned for next 2 weeks?</b></p> <ul style="list-style-type: none"> <li>Ongoing work with HCBS global transition plan</li> <li>Ongoing work on quality management collaboration process with QM team</li> <li>Finish work on CAP and submit to CMS. Document is currently with QA manager for review and completion.</li> <li>Oregon asked for extensions on the OR.0375.R02; OR.40193.R02; OR.40194.R02 waivers as they will expire December 27, 2014.</li> <li>Work on 372 reports for Comp and Supports waivers.</li> </ul>	<ul style="list-style-type: none"> <li>Submission of the Medically Involved Waiver amendment</li> <li>Negotiate CMS approval of 0117, 0375, 40193, 40194 waivers – no later than March 7, 2015.</li> <li>Approval for QIS that will come with waiver approval, or before then. The QIS is included in the CAP as well.</li> <li>372 reports for Comp and Supports waivers – due 12-31-2014</li> <li>Re-submit CAP to CMS</li> </ul>

<p>Oregon Administrative Rules (OAR's)  Strategy Lead: Mike Parr</p>	<p>Green</p>	<p><b>Previous Status: Yellow/Trending Green</b> ↔</p> <p><b>Accomplishments in the last 2 weeks?</b></p> <ul style="list-style-type: none"> <li>Public hearings held, written comments received. Public comment period has closed.</li> <li>OAR orientation Powerpoints posted to the DHS website.</li> <li>The call-ins for rule orientation are being held</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Obtain ODDS director approval of finalized rule language.</li> </ul>	<ul style="list-style-type: none"> <li>Dec 12 - ODDS Director Review/Approval</li> <li>Dec 15-19- OHA Review</li> <li>Dec 22- Permanent Filed/Effective</li> </ul>
<p>Functional Needs Assessment (FNAT)  Strategy Lead: Kristine Duffy</p>	<p>Green</p>	<p><b>Previous Status: Green / Trending Yellow:</b> ↔</p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>No changes</li> </ul> <p><b>Activities planned in next two weeks:</b></p> <ul style="list-style-type: none"> <li>Draft of SNAP Manual will be sent to field for review by December 12<sup>th</sup>.</li> </ul>	<ul style="list-style-type: none"> <li>ANA/CNA Version C to be released by 12/31/14</li> </ul>
<p>Individual Support Plan (ISP)  Strategy Lead: Marilee Bell</p>	<p>Green</p>	<p><b>Previous Status: Green / Trending:</b> ↔</p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>Webinar held on 11/25/14 for participants of the mini field review on the latest ISP and associated documents</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Mini field review to conclude December 31, 2014</li> <li>Continue to develop training materials</li> <li>Regional Forums will be scheduled beginning in January</li> </ul>	<ul style="list-style-type: none"> <li>9/1/14-12/31/14 - Prepare training materials and final comments for statewide release of one ISP</li> <li>1/15/15 – 2/28/15- Roll out of regional trainings statewide</li> <li>3/31/15 – Statewide implementation – Spring 2015</li> </ul>
<p>Plan of Care (POC)  Strategy Lead: Julie Harrison</p>	<p>Yellow</p>	<p><b>Previous Status: Green / Yellow:</b> ↔</p> <p><b>Accomplishments in last two week:</b></p> <ul style="list-style-type: none"> <li>General adoption and partnership from Deschutes and UCP in field test has been high and successful</li> <li>Mid-November PSW pay cycle has been completed successfully – manual support was required to complete Rates and Units submission to TNT (this was the 3<sup>rd</sup> pay cycle for Deschutes and the 1<sup>st</sup> pay cycle for UCP)</li> <li>eXPRS Patch was deployed on 11/20</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Final proposal for “POC Phase-In” process to be completed and sent to partners by 12/5/14</li> <li>Process analysis of PSW enrollment to be completed by 12/12</li> <li>Process analysis of invoice submission and proposals for process improvement completed by 12/12</li> <li>Continued entry of POCs by field</li> <li>Continue providing technical assistance support to the field on POC employment services implementation</li> </ul>	<ul style="list-style-type: none"> <li>POC Phase-In Process implementation 1/1/15</li> </ul>

<p>Quality Improvement Strategy Lead: Brent Watkins</p>	<p>Green</p>	<p><b>Previous Status: Green / Trending:</b> ↔</p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>Ongoing collaboration OBI to respond to additional questions related to the electronic QA system</li> <li>Schedule for CDDP and Brokerage reviews developed and shared at joint CDDP/Brokerage meeting</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>QM project team reviewing desired outcomes</li> <li>Orientation to audit process mapping scheduled for 12/9/14</li> <li>Process mapping to begin by 12/12</li> <li>Adding CFR, Waiver and K plan Performance Measures, OARs and policy transmittal citations to field review checklist</li> </ul>	<ul style="list-style-type: none"> <li>Develop a reporting format for other field review checklists— Policies and Procedures, Personnel, ect.</li> <li>Post developed QA tools and resources on DD QA page: <a href="http://www.oregon.gov/dhs/DD/Pages/quality-assurance.aspx">http://www.oregon.gov/dhs/DD/Pages/quality-assurance.aspx</a></li> </ul>
<p>Training Strategy Lead: Marilee Bell</p>	<p>Green</p>	<p><b>Previous Status: Green / Trending:</b> ↔</p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>No changes</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>ODDS staff will continue to review competencies which have been vetted by the field (providers, services coordinators and personal agents).</li> <li>First introductory module on using the Learning Center was tested. Field test will continue on vetted modules which have completed the production stage in development.</li> </ul>	<p><b>Core Competency:</b></p> <ul style="list-style-type: none"> <li>11/15/14-1/31/15 expand field test</li> <li>1/1/15-3/14/15 – Incorporate changes to modules; test in the Learning Center; Upload materials</li> <li>3/15/15 – Statewide implementation of Core Competencies</li> </ul>
<p>Communication Strategy: Strategy Owner/Lead: Brenda Autry</p>	<p>Yellow</p>	<p><b>Previous Status: Yellow / Trending:</b> ↔</p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>Continue to update FAQ's every two weeks</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Continue to collaborate with ODDS Operations to refine communications process flow</li> <li>Determine who should coordinate share point training for the web managers.</li> </ul>	<ul style="list-style-type: none"> <li>Communication process developed and being implemented for questions prior to web page redesign.</li> </ul>
<p>Contracts Administration: Lead: Renee Shippey</p>	<p>Green</p>	<p><b>Previous Status: Green / Trending:</b> ↔</p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>Completed request for new Umatilla County contract</li> <li>Umatilla MOU approved by DOJ and fully executed</li> <li>Final changes to brokerage amendment agreed upon and drafted for OC&amp;P processing</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Submit final draft of Umatilla Contract to OC&amp;P to prepare for DOJ review</li> <li>Obtain Jefferson County approval of Amendment #6</li> <li>Finish drafting 15-17 Service Elements and send to CDDPs for review</li> </ul>	<ul style="list-style-type: none"> <li>Finalize Brokerage Amendment</li> <li>Finalize Umatilla Contract</li> </ul>

<p>Service Access: Lead/Jeanette Baxter</p>	<p style="text-align: center;"><b>Green</b></p>	<p><i>Previous Status: Green / Trending: ↔</i></p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>No changes</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Continue revising Complaint Website verbiage</li> </ul>	<ul style="list-style-type: none"> <li>Implementation of complaints web page by 12/31/14</li> <li>Revise Complaint form 03/15</li> <li>Development of Worker Guide for issuing Notification of Planned Actions by Feb. 2015</li> </ul>
<p>Stabilization and Crisis Unit: Lead/Tracy Wilder</p>	<p style="text-align: center;"><b>Green</b></p>	<p><i>Previous Status: Green / Trending: ↔</i></p> <p><b>Accomplishments in last two weeks?</b></p> <ul style="list-style-type: none"> <li>No changes</li> </ul> <p><b>Activities planned for next two weeks:</b></p> <ul style="list-style-type: none"> <li>Coordinating with community partners and staff to prepare for six clients to exit in a month. Developing training plans for community homes.</li> <li>Analyzing the acuity levels and stability of current clients to determine appropriate next steps, i.e., step down internally from locked home to unlock home, step down to community placement, etc. Developing strategic plan and appropriate next steps.</li> </ul>	<ul style="list-style-type: none"> <li>Development of metrics tracking client entries, exits, and length of stay</li> <li>Continued Development of action plans to decrease length of client stay and increase the number of client exits.</li> <li>Implementation of new software program that will allow the agency to better track client activities.</li> </ul>

**Risk Log**

<b>Risk</b>	<b>Impact</b>	<b>Mitigation</b>	<b>Responsible Party</b>	<b>Date Completed</b>
<p>POC: 1. Enrollment of PSWs using current process challenges 1/1/15 implementation goal. 2. PSW invoice submission process is exceeding provider resources and challenges 1/1/15 implementation goal.</p>	<p>Both risk elements increase likelihood of providers not being paid in a timely manner. Both processes will continue to create barriers to successful utilization of POC as they currently function.</p>	<p>Establish POC phase-in process with full implementation 4/1/15. Introduction of Phase-In process to providers by 12/5/14</p> <p>Complete process analysis of PSW enrollment and PSW invoice submission to create functional and sustainable long-term solutions to both.</p>	<p>POC Steering Committee</p>	