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ID	Task Name	Duration	Start	Finish	Resource Names
1	Developmental Disabilities K Plan	328 days	Mon 7/1/13	Tue 9/30/14	
2	CMS Transition Plan				
3	Compliance	262 days	Mon 7/1/13	Tue 7/1/14	
4	✓ CMS approval for K option and waivers	1 day	Mon 7/1/13	Mon 7/1/13	Patrice Botsford
5	Transmittal to field regarding ending of Proctor Care services	22 days	Tue 10/1/13	Wed 10/30/13	Bruce Baker
6	Transmittal to field regarding proctor transition to foster care	34 days	Tue 10/1/13	Fri 11/15/13	
7	Ending of Proctor Care Services	45 days	Thu 10/31/13	Tue 12/31/13	Bruce Baker
8	CIIS monthly waiver reports for #40913 and #40194 waivers due monthly from CIIS staff to waiver unit	106 days	Mon 7/1/13	Mon 11/25/13	Darlene O'Keefe
9	OHA Review	4 days	Mon 11/25/13	Thu 11/28/13	Dana Hittle/OHA
10	Submit to CMS	2 days	Thu 11/28/13	Fri 11/29/13	Darlene O'Keefe
11	HCBS Waiver Review Checklist	1 day?	Mon 7/1/13	Mon 7/1/13	Darlene O'Keefe
12	develop timelines				Darlene O'Keefe
13	Comprehensive Waiver Review	1 day?	Mon 7/1/13	Mon 7/1/13	Darlene O'Keefe
14	Awaiting final report from CMS				CMS
15	Support Services Waiver	1 day?	Mon 7/1/13	Mon 7/1/13	Darlene O'Keefe
16	Awaiting draft report from CMS				CMS
17	Create a new waiver service called Waiver Case Management				Darlene O'Keefe
18	Oregon will request an amendment of this waiver no later than 07/01/2014 to separate, re-define and implement a new rate structure for Prevocational and Supported Employment services.			Tue 7/1/14	Darlene O'Keefe
19	FNAT				Kristine Duffy
20	Convene Stakeholder group		Mon 8/5/13		
21	Initiate discussion with NQE regarding the need for Functional Support Assesment Tool				
22	✓ Develop Adults In-Home assesment Tool	1 day	Fri 11/1/13	Fri 11/1/13	Kristine Duffy
23	Develop Children's In-Home assesment tool				
24	Spanish Needs Assesment Tool				
25	✓ Stakeholder/NQE review of tool	1 day	Mon 7/1/13	Mon 7/1/13	


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ID		Task Name	Duration	Start	Finish	Resource Names
26	✓	Assesment Tool Training	1 day	Mon 10/21/13	Mon 10/21/13	Kristine Duffy
27	✓	Communication to field	22 days	Tue 10/1/13	Wed 10/30/13	Kristine Duffy
28	✓	Implement In home assesment tool	21 days	Tue 10/1/13	Tue 10/29/13	Kristine Duffy
29		FNAT Process MAP			Mon 11/11/13	Chelas Kronenberg
30		Develop In home tool FAQ			Sat 11/30/13	Kristine Duffy
31		FAQ to web			Sat 11/30/13	Kristine Duffy
32		SIS for adults in-home services				Kristine Duffy
33		SIS Training				Kristine Duffy
34		HSRI contracting			Sat 11/30/13	Lea Ann Stutheit
35		Level of Care (LOC)				Acacia McGuire
36	✓	Develop a new LOC form	1 day	Mon 7/1/13	Mon 7/1/13	Acacia McGuire
37	✓	Develop technical guide for field	37 days	Mon 10/21/13	Mon 12/9/13	Acacia McGuire
38		LOC Process Map	306 days?	Mon 7/1/13	Fri 8/29/14	Acacia McGuire
39	✓	Draft LOC Process Map	1 day	Mon 11/11/13	Mon 11/11/13	Acacia McGuire
40		Review and submit process map for approval	306 days	Mon 7/1/13	Fri 8/29/14	Acacia McGuire
41		Review process map regularly to determine improvement opportunities				Acacia McGuire
42		Amend LOC form	31 days	Tue 10/29/13	Mon 12/9/13	Acacia McGuire
43		Stakeholder review				Acacia McGuire
44		Develop Action Requests and information for field to assist on LOC process	21 days	Mon 11/4/13	Sat 11/30/13	Acacia McGuire
45						
46		ISP	184 days	Thu 8/1/13	Tue 4/15/14	Marilee Bell
47	✓	Develop stakeholder workgroup to develop 1 ISP	22 days	Thu 8/1/13	Fri 8/30/13	Marilee Bell
48		Interim Case Management Service Plan	337 days?	Tue 1/1/13	Tue 4/15/14	Marilee Bell
49		Planning process defined	22 days	Thu 8/1/13	Fri 8/30/13	Marilee Bell
50		Discovery-expectations for gathering information	34 days	Thu 8/15/13	Tue 10/1/13	Marilee Bell
51		Define expectations	23 days	Mon 9/2/13	Wed 10/2/13	Marilee Bell
52		ISP checklist	26 days	Mon 9/2/13	Mon 10/7/13	Marilee Bell
53		Kids ISP	37 days	Mon 9/2/13	Tue 10/22/13	Bruce Baker


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ID		Task Name	Duration	Start	Finish	Resource Names
54	✓	Develop DRAFT Expenditure guidelines for CDDP's-In home	44 days	Sun 9/1/13	Wed 10/30/13	Mike Parr
55		Finalize Expenditure guidelines for CDDP's -In Home				Mike Parr
56	✓	Develop Action Request (AR) for field	24 days	Tue 10/1/13	Fri 11/1/13	Marilee Bell
57		Develop Action Request (AR) for kids	5 days	Wed 10/30/13	Tue 11/5/13	Marilee Bell
58		ISP process Map	30 days	Tue 10/1/13	Mon 11/11/13	Chelas Kronenberg
59		Entering Services for the first time				Marilee Bell
60		Planning process defined	89 days	Wed 8/14/13	Sun 12/15/13	Marilee Bell
61		Monitoring forms	1 day	Tue 1/1/13	Tue 1/1/13	Marilee Bell
62		Full ISP	89 days?	Thu 12/12/13	Tue 4/15/14	Marilee Bell
63		Change form/addendum		Thu 12/12/13		Marilee Bell
64		Entry/Exit ISP		Thu 12/12/13		Marilee Bell
65		Design field test	58 days	Thu 12/12/13	Sat 3/1/14	Marilee Bell
66		From prepared for field test		Thu 12/12/13		Marilee Bell
67		Training prepared for field test		Thu 12/12/13		Marilee Bell
68		Training curriculum updated		Thu 12/12/13		Marilee Bell
69		Fully implemented ISP	89 days	Thu 12/12/13	Tue 4/15/14	Marilee Bell
70		Choice Advising	67 days	Thu 8/1/13	Fri 11/1/13	Marilee Bell
71		Brochure	37 days	Mon 9/2/13	Tue 10/22/13	Shelly Reed
72		Publication/distribution	45 days	Mon 9/2/13	Fri 11/1/13	Shelly Reed
73		Brochure for Children/ Families in K Plan	16 days	Tue 11/12/13	Mon 12/2/13	Bruce Baker
74		First draft brocure for kids	7 days	Fri 11/8/13	Mon 11/18/13	Bruce Baker
75		Training developed	45 days	Mon 9/2/13	Fri 11/1/13	Marilee Bell
76		Process Map CA	51 days	Mon 9/2/13	Mon 11/11/13	Chelas Kronenberg
77	✓	Conversation guidance	15 days	Mon 9/30/13	Fri 10/18/13	Shelly Reed
78		Brokerage waitlist		Mon 9/2/13		Lea Ann Stutheit
79						
80		POC	73 days	Sun 9/1/13	Tue 12/10/13	Julie Harrison
81		eXPRS POC system changes	118 days	Mon 7/1/13	Tue 12/10/13	
82		eXPRS POC service authorization	118 days	Mon 7/1/13	Tue 12/10/13	
83		addition of trust benefit amount and client			Tue 12/10/13	eXPRS Tech Team


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ID		Task Name	Duration	Start	Finish	Resource Names
84		add functionality to capture the			Tue 12/10/13	eXPRS Tech Team
85		eXPRS POC claims screens/process			Tue 12/10/13	eXPRS Tech Team
86		POC service procedure codes/modifiers by SE			Tue 12/10/13	Julie Harrison
87		POC service determination rules			Tue 12/10/13	Julie Harrison
88		POC service funding rules			Tue 12/10/13	Julie Harrison
89		POC reports			Fri 11/22/13	eXPRS Tech Team
90		POC user permissions/roles			Fri 11/29/13	eXPRS Tech Team
91		eXPRS/POC User Acceptance Testing			Tue 12/10/13	eXPRS Tech Team
92		eXPRS provider portal to enroll new PSW/individual providers	100 days	Mon 7/1/13	Fri 11/15/13	eXPRS Tech Team
93		update functionality to add ability to upload docs?			Fri 11/15/13	eXPRS Tech Team
94		CEP - POC technical/system development	118 days	Mon 7/1/13	Tue 12/10/13	eXPRS Tech Team
95		interface w/eXPRS to process claims			Tue 12/10/13	eXPRS Tech Team
96		accounting changes to process POC claims			Tue 12/10/13	eXPRS Tech Team
97		funding rule table set up to process POC claims			Tue 12/10/13	eXPRS Tech Team
98		data reporting to DSSURS and back to eXPRS re: POC claims				eXPRS Tech Team
99		CEP/eXPRS Interface & CEP payments processing UAT				eXPRS Tech Team
100		Provider enrollment for use in POC	111 days?	Mon 7/1/13	Sat 11/30/13	Julie Harrison
101		PSW/individual provider data loads to DHS prov database				Julie Harrison
102		"Brokerage certified agency" providers enrollment	111 days	Mon 7/1/13	Sat 11/30/13	Brande Martinez
103		communication out to those providers re: need to complete PEA and return			Fri 11/8/13	Mike Parr
104		get provider information from ORLO to create provider records for eXPRS use for POC to			Fri 11/8/13	Brande Martinez
105		communication to providers re: now will be using eXPRS to submit claims			Fri 11/8/13	Mike Parr
106		Interim PSW/provider enrollment process to use until provider portal is used by CDDPs/Brokerages	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
107		develop form	23 days	Thu 10/31/13	Sat 11/30/13	Julie Harrison
108		develop process (who will do what)			Sat 11/30/13	Lea Ann Stutheit


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ID		Task Name	Duration	Start	Finish	Resource Names
109		develop process on how providers submit changes to their information (address phone, email, etc) after enrolled	23 days	Thu 10/31/13	Sat 11/30/13	Lea Ann Stutheit, Deb Satterfield
110		communication out RE: process to CDDPs/Brokerages/Providers			Sat 11/30/13	Lea Ann Stutheit, Deb Satterfield
111		get provider enrollment information for those providers who are new, and were not included in the mass provider load process			Sat 11/30/13	Lea Ann Stutheit, Deb Satterfield
112		Other ODDS business process changes/decisions/communication/information still needed for successful launch 1/1/2014	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
113		POC paper claims process	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
114		Forms (draft)	19 days	Mon 10/7/13	Thu 10/31/13	Julie Harrison
115		Send forms for review/approval	16 days	Fri 11/1/13	Fri 11/22/13	Julie Harrison
116		submission process (who will do what)			Sat 11/30/13	Lea Ann Stutheit, Deb Satterfield
117		communication out RE: process to CDDPs/Brokerages/Providers			Sat 11/30/13	Lea Ann Stutheit, Deb Satterfield
118		Mini contracts roll over by the CAU	111 days	Mon 7/1/13	Sat 11/30/13	CAU Staff
119		submission and return of IGA/contracts from CDDPs/Brokerages			Sat 11/30/13	CAU Staff
120		run process to correct RFFS claims for SE48 and SE148 to show the correct rate for BI 13-15			Sat 11/30/13	Brande Martinez
121		complete SEPA work in eXPRS for ALL eXPRS svcs, including POC			Sat 11/30/13	CAU Staff
122		roll/extend current SE48 CPAs			Sat 11/30/13	CAU Staff
123		roll/extend current SE148 CPAs			Sat 11/30/13	CAU Staff
124		roll/extend all other eXPRS svc CPAs			Sat 11/30/13	CAU Staff
125		PSW/individual provider communication	131 days	Mon 7/1/13	Fri 12/27/13	Lea Ann Stutheit
126		notice out of provider number assignment			Fri 12/27/13	Lea Ann Stutheit
127		notice out to providers who have failed the ACA validation process that not "approved to work". they are			Fri 12/27/13	Lea Ann Stutheit
128		communication to providers who have yet to submit their PEA, to return to ODDS in order to get enrolled/prov number			Fri 12/27/13	Lea Ann Stutheit
129		communication out to providers that they need to submit their W4 withholdings forms			Fri 12/27/13	Lea Ann Stutheit

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ID		Task Name	Duration	Start	Finish	Resource Names
130		communication to provider asking for their payment method of choice (EFT or paper check), then get direct deposit forms back for those who have chosen EFT			Fri 12/27/13	Lea Ann Stutheit
131		final/clear decision needed on whether SE145-CIIS will be using POC as of Jan 1st, or if they will roll into POC at a later date			Fri 11/29/13	Lea Ann Stutheit
132		DD PC20 provider credential/re-credential information needed	105 days	Mon 7/1/13	Fri 11/22/13	
133		set credential to temporary for 1 yr			Fri 11/22/13	Stacey Apodaca
134		get list of current/active DD PC20 providers from database			Fri 11/22/13	Stacey Apodaca
135		notice out to CDDPs w/provider list that they will need to have PC20 providers complete PEA & CHC at their annual re-authorization, and submit to ODDS			Fri 11/22/13	Lea Ann Stutheit
136		decision needed about extending credential period for those DD PC20 providers are due to expire in Nov/Dec 2013 and Jan 2014 to give CDDPs enough time to get PEA/CHC done & submitted			Fri 11/22/13	Lea Ann Stutheit
137		Information needed on provider relationship that qualifies them to be exempt from FICA w/holdings	91 days	Mon 7/1/13	Mon 11/4/13	Lea Ann Stutheit
138		find/research which type of familial relationships qualify for exempt from FICA withholdings for providers			Mon 11/4/13	Lea Ann Stutheit
139		communication to CDDPs/Brokerages to get which providers have qualifying relationship with client for FICA exemption			Mon 11/4/13	Lea Ann Stutheit
140		will also need client name/prime for provider who has qualifying exempt relationship with provider			Mon 11/4/13	Lea Ann Stutheit
141		CEP/POC claims payment business process/policy decisions still needed	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
142		Returned checks from providers that are incorrect	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
143		how will ODDS handle this for their POC providers? Who will do this work?			Sat 11/30/13	Lea Ann Stutheit
144		Lost checks	1 day	Sat 11/30/13	Sat 11/30/13	Lea Ann Stutheit




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ID		Task Name	Duration	Start	Finish	Resource Names
145		how will ODDS handle this for their POC providers? Who will do this work?			Sat 11/30/13	Lea Ann Stutheit
146		process for handling lost checks reported that are actually cashed			Sat 11/30/13	Lea Ann Stutheit
147		Incoming calls re: POC providers/claims/issues/questions	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
148		how will ODDS handle this for their POC providers? Who will do this work?			Sat 11/30/13	Lea Ann Stutheit
149		Client pay-in/contribution to cost of their in-home services/care	1 day	Sat 11/30/13	Sat 11/30/13	Lea Ann Stutheit
150		how will this be handled for POC/in-home clients who must contribute to the cost of their services, per CMS requirements			Sat 11/30/13	Lea Ann Stutheit
151		will the pay-in process be different for children receiving in-home services than for adults? If so, how?			Sat 11/30/13	Lea Ann Stutheit
152		Conduct cost/benefit analysis for use of CEP to process POC claims vs continue to use the Fiscal Intermediaries to facilitate POC payments to DD PSW/individual providers			Mon 11/4/13	Lea Ann Stutheit
153		Determine whose EIN number will be used to facilitate PSW/individual provider payments? The State's EIN, or each individual client employer?				Lea Ann Stutheit
154		How to handle providers who get multiple checks?				Lea Ann Stutheit
155		unemployment benefits & tax withholdings for non-PSW providers paid via CEP - do we do this?				Lea Ann Stutheit
156		define garnishments process for DD PSW/individual provider payments from CEP				Lea Ann Stutheit
157		define the claims refinance process for DD PSW/individual provider payments from CEP				Lea Ann Stutheit
158		who will handle calls from SEIU, OHCC, providers, etc on various issues RE: payments union dues, taxes, withholdings, etc.				Lea Ann Stutheit



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159	What are the reporting requirements/needs for the 5% recoupment rate and balance still to be recouped from DD PSW/individual providers	111 days	Mon 7/1/13	Sat 11/30/13	Lea Ann Stutheit
160	How will that provdier liability information be stored/displayed in eXPRS?			Sat 11/30/13	Lea Ann Stutheit
161	Define claims reconciliation process for DD PSW/individual provider payments from CEP				Lea Ann Stutheit
162	Determine the SPD data warehouse needs for DD PSW/individual provider claims paid via CEP				Lea Ann Stutheit
163	Determine payment information for DD PSW/individual provider payments from CEP be reported to and displayed in eXPRS	1 day?	Mon 7/1/13	Mon 7/1/13	Lea Ann Stutheit
164	what information do we want to show and report in the payment remittance advice				Lea Ann Stutheit
165	Determine YTD payment information for DD PSW/individual provider payments from CEP be reported to and displayed in eXPRS				Lea Ann Stutheit
166	Determine the process for managing DD funding rules for POC services in the funding rule mainframe tables to be used by CEP for processing DD PSW/Individual provider payments				Lea Ann Stutheit
167	screens/process				
168	OSIPM/OHP/Magi map				
169					
170					
171					
172	QI				
173					
174					
175					
176	Prevocational and supported Employment Services				
177					

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ID		Task Name	Duration	Start	Finish	Resource Names
178						
179		OAR's	87 days	Mon 9/2/13	Tue 12/31/13	Lea Ann Stutheit
180		Draft Rule Revisions	23 days	Thu 10/31/13	Sat 11/30/13	Chelas Kronenberg, Corissa Neufe
181		Payment Rule revision - PSW	23 days	Thu 10/31/13	Sat 11/30/13	Lea Ann Stutheit
182		Waiver Case Management OAR	23 days	Thu 10/31/13	Sat 11/30/13	Mike Parr
183		In Home Services OAR	23 days	Thu 10/31/13	Sat 11/30/13	Mike Parr
184		PSW OAR	23 days	Thu 10/31/13	Sat 11/30/13	Corissa Neufeldt
185		Hearings and Complaints OAR	23 days	Thu 10/31/13	Sat 11/30/13	Chelas Kronenberg
186		ISP OAR	23 days	Thu 10/31/13	Sat 11/30/13	Marilee Bell
187		Certification & Endorsement OAR	23 days	Thu 10/31/13	Sat 11/30/13	Lea Ann Stutheit
188		Behavior Consultation	23 days	Thu 10/31/13	Sat 11/30/13	May Martin
189		Eligibility	23 days	Thu 10/31/13	Sat 11/30/13	Chelas Kronenberg
190		ODDS definitions	23 days	Thu 10/31/13	Sat 11/30/13	Mariah Forrest
191		Rule Advisory Committee				
192		Perm Rules	44 days	Thu 10/31/13	Tue 12/31/13	
193						
194		Communication Plan	173 days	Fri 11/1/13	Mon 6/30/14	Nelsa Brodie
195		Build understanding of and support for the system wide changes occurring	174 days	Thu 10/31/13	Mon 6/30/14	
196		Weekly DD Directors Messages and updated FAQs	1 day	Mon 6/30/14	Mon 6/30/14	Patrice Botsford
197		Talking points for CDDP and Brokerage and other Managers meetings			Mon 6/30/14	Nelsa Brodie
198		Presentations at key stakeholders meetings around the state			Mon 6/30/14	Patrice Botsford
199		Facebook postings and web page updates			Mon 6/30/14	Brent Watkins
200		Webinars			Mon 6/30/14	
201		Build understanding and support internally for the numerous working groups	174 days	Thu 10/31/13	Mon 6/30/14	Patrice Botsford
202		Weekly DD Directors Messages and updated FAQs			Mon 6/30/14	Patrice Botsford

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ID		Task Name	Duration	Start	Finish	Resource Names
203		Talking points for CDDP and Brokerage and other Managers meetings			Mon 6/30/14	Patrice Botsford
204		Webinars			Mon 6/30/14	
205		Web page updates			Mon 6/30/14	Brent Watkins
206		Reduce stigma and build understanding externally that Oregonians with I/DD have the opportunity to live safe and healthy lives where and how they choose, with all the rights and responsibilities enjoyed by all citizens of Oregon .	174 days	Thu 10/31/13	Mon 6/30/14	Patrice Botsford
207		Success Stories			Mon 6/30/14	Nelsa Brodie
208		Web page stories			Mon 6/30/14	Nelsa Brodie
209		Facebook and Twitter			Mon 6/30/14	Brent Watkins
210		Editorial boards/guest opinions/letters to the editor			Mon 6/30/14	Nelsa Brodie
211		Statewide spotlights in DDD Director's messages			Mon 6/30/14	Patrice Botsford
212		Local talk shows			Mon 6/30/14	
213		Make it easy for the public to understand how to access services.	174 days	Thu 10/31/13	Mon 6/30/14	
214		Web based brochure—eligibility and our services “Welcome basket”	1 day	Mon 6/30/14	Mon 6/30/14	
215		Hard copy brochure—handed out through PSW's and others and available through partners around the state			Mon 6/30/14	
216		Easily maneuvers through the web page			Mon 6/30/14	
217		Facebook			Mon 6/30/14	