Core Competencies

for Services Coordinators and Personal Agents

List of competency statements and
instructional and assessment methods

This guide provides a summary of the required core competencies for Services Coordinators and Personal Agents (SC/PAs). Each competency statement is provided, along with the expected training requirements and methods for assessing competency.

Definitions

- **Local training**: Training provided by a trainer/supervisor at your organization or a curriculum developed and trained by an outside entity (e.g. First Aid/CPR).
- **Online course**: Training which the learner completes in the state learning management system. Online courses include content to be read, videos, resources, and an online quiz to be completed by the learner. In order to complete the course, the included quiz questions must be answered with at least 85% accuracy. Successful completion of each course is tracked within the learner's transcript inside the state management system.
- **Oral demonstration**: Demonstrating competency by explaining a skill, task, or understanding of a concept to another person.
- **Physical demonstration**: Demonstrating a skill, task, or understanding of a concept while observed by trainer or supervisor.
- **Reading**: In most cases, recommended reading materials are provided in the Resources tab of the related online course. Your organization may require other reading materials as well.

*Throughout this document, items shaded in light gray indicate **local** training or assessment expectations.*

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SC/PA Core Competencies Tier 1: *Must be completed within 30 days of start date and before working unassisted*

Module	Competency Statement & Learning Objectives	Instructional & Assessment Expectation(s)	Notes
101. Introduction to Tier 1 Online course	Begin Tier 1 by launching this online module. It will introduce you to the core competencies expectations. When you finish all of the online and local requirements for Tier 1, return to this module to acknowledge that you have completed all of the training requirements of Tier 1.	**Online course only**	
102. What It Means to Provide Good Case Management (Part 1) Online course --------------------------------------- **103. What It Means to Provide Good Case Management (Part 2)** Online course	Introduction to the role of case management.	**Online course** **Local training:** Training on your organization's expectations; policies, and procedures; personal safety on the job. **Reading:** Tip sheet on stress and burnout	

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104. Rights, Complaints, and Being a Proponent Online course	**Rights**: Understand that basic civil and human rights are extended equally to persons served within the Oregon I/DD system.	**Online course** **Reading:** Oregon Administrative Rules related to Individual Rights, Complaints, Notification of Planned Action, and Contested Case Hearings for Developmental Disability Services	
	Rights: Able to identify rights possessed by persons in service beyond basic human and civil rights, including but not limited to the choice of residence and place of employment, freedom of movement, and freedom of communication and association.	**Online course only**	
	Complaints and Being a Proponent: Understand the resources a person has when rights are violated, services are denied, or when a person is dissatisfied with the quality of services. This includes the policies and processes for complaints and appeals.	**Online course** **Local training:** Training on your organization's complaint policies. **Oral demonstration:** Demonstrate understanding of your organization's complaint policies.	
105. Person Centered Language Online course	Understand and use person centered language in all interactions.	**Online course only**	

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106. Case Management and Provider Qualifications Online course	**Case Management Qualifications**: Understand the need to meet the qualification requirements for providing case management services, including acquiring necessary training as needed.	**Online course** **Local training:** Learn your organization's expectations for initial and ongoing training. **Reading**: Oregon Administrative Rules: Community Developmental Disability Programs; Support Services For Adults With Intellectual Or Developmental Disabilities	
	Qualified Providers: Be able to explain the types of service providers in Oregon and understand the qualifications required of each.	**Online course** **Reading**: DHS Criminal Records and Abuse Check Rules	
107. Introduction to Person Centered Practices Online course	Understand the principles of person centered practices and how they are used by case management.	**Online course** **Reading:** Handout of various available person centered planning approaches	
108. Seeking the Person's Perspective Online course	Understand case management's role to ensure the person's perspective is sought and know that it is critical in planning.	**Online course only**	
109. Conflict of Interest Online course	Able to recognize conflict of interest, explain it to others, and take action when necessary.	**Online course only**	
110. Reporting Serious Incidents Online course	Understand case management's role in completing or reviewing documentation for serious incidents, including incident reports, death notifications, and Centralized Abuse Management system (CAM) reporting.	**Online course** **Local training:** Learn how to complete required forms. **Physical demonstration**: Demonstrate ability to successfully complete required forms.	

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111. Oregon ISP Process (Part 1): Planning Overview and Natural Supports Online course	**Purpose of the ISP:** Understand the purpose of the Individual Support Planning (ISP) process.	**Online course only**	
	Role of Identified ADL/IADL Needs in Planning: Understand how Activities of Daily Living (ADL) and Instrumental Activities of Daily Living (IADL) support needs are identified and how this directly informs planning.	**Online course only**	
	Natural Supports: Understand the definition and importance of natural supports, how they are considered when planning, and the role case management can play in promoting development of natural supports.	**Online course only**	
112. Oregon ISP Process (Part 2): ISP Team, Values, and Self Determination Online course	**ISP Team:** Understand the definition of an ISP team and the role the team plays in planning with the person and delivery of services. Understand the role that each member of the team plays within the ISP team.	**Online course** **Reading:** Oregon Administrative Rules related to Individual Support Planning	
	ISP Values & Self Determination: Understand the values that drive the Individual Support Planning (ISP) process.	**Online course only**	
113. Choice Advising Online course	Understand the case management role in choice advising.	**Online course** **Reading:** DHS Policy Transmittals related to Choice Advising	

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114. CMS and Stewardship of Public Funds Online course	**CMS Funds**: Have a basic understanding of the system of delivering services funded by the Centers for Medicare & Medicaid Services (CMS).	**Online course only**	
	Stewardship: Understand resourceful stewardship of public funds, and how case management must ultimately answer to the taxpayer.	**Online course only**	
115. Values and History Online course	**DHS Core Values**: Be familiar with the Core Values of Oregon Department of Human Services.	**Online course** **Reading:** DHS Core Values	
	Values & History: Understand other values within the Oregon I/DD system.	**Online course only**	
116. Confidentiality Online course	**Confidentiality**: Understand the case management responsibility to follow confidentiality standards and be able to cite specific examples of situations that are deemed confidentiality violations.	**Online course** **Local training:** Learn your organization's confidentiality expectations; training on confidentiality offered by ODDS to foster providers. **Reading:** Oregon Administrative Rules related to Confidentiality; DHS Privacy Practices	

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117. Qualifying Encounters and Professional Documentation Online course	**Qualifying Encounters:** Understand requirements for documented, qualifying encounters for people receiving state plan or waiver services. Understand case management's role in delivering and documenting required qualifying encounters.	**Online course** **Local training:** Guidance on completing qualifying encounters. **Physical demonstration**: Demonstrate ability to complete qualifying encounters accurately. **Reading**: ODDS Technical Guide	
	Professional Documentation: Be able to use basic professional writing skills in all documentation.	**Online course** **Local training:** Organization's documentation practices. **Physical demonstration:** Demonstrate ability to effectively complete required written documentation.	
	Record Keeping Systems: Know the specific forms and/or electronic record-keeping systems that are necessary to complete required documentation.	**Online course** **Local training:** Training on completing required forms; organization's policies and/or procedures around documentation. **Physical demonstration:** Demonstrate ability to complete required forms and documentation.	
118. Oregon's Employment First Policy Online course	Understand the case management role in carrying out Oregon's Employment First policy.	**Online course** **Reading:** Oregon's Employment First Policy	

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119. Eligibility Online course	Understand basic eligibility standards for services funded through the Office of Developmental Disability Services (ODDS).	**Online course** **Local training:** Understand your organization's process for determining eligibility (including working with a local eligibility specialist, if applicable). **Oral demonstration:** Able to successfully identify how eligibility is determined following your organization's process.	
120. Record Keeping *Local only*	Understand case management's role in adhering to the organization's record keeping requirements.	**Local training:** Learn your organization's expectations for record keeping. **Physical demonstration:** Demonstrate understanding of your organization's record keeping requirements.	
121. Emergency Response *Local only*	Understand your organization's plans in place to mitigate risk and be able to respond as required in case of emergency.	**Local training:** Awareness of your organization's disaster and emergency preparedness plans and your role. **Oral demonstration:** Demonstrate understanding of your organization's plans. **Reading:** Oregon Administrative Rules regarding emergency preparedness	
122. Abuse Reporting *Local only*	Demonstrate knowledge of and ability to follow the mandatory abuse reporting process. Understand the case management role in providing protective services and assisting with abuse investigations as directed by ODDS.	**Local training:** Complete training module and quiz published by Office of Training Investigations and Safety (OTIS) or follow your organization's expectations. **Reading:** Oregon Administrative Rules regarding abuse reporting	

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Module	Competency Statement & Learning Objectives	Instructional & Assessment Expectation(s)	Notes
123. Level of Care *Local only*	Understand Level of Care (LOC) and the case management responsibilities related to it.	***Other training provided by DHS/ODDS: ONA training for case managers.*** **Local training:** Training on local procedures for requesting an ONA. **Physical demonstration**: Able to successfully complete the Level of Care. **Reading**: Level of Care Assessment Technical Guide (available in the Resources tab of module 119: Eligibility)	
124. Needs Assessment *Local only*	Able to objectively complete a Needs Assessment.	***Other training provided by DHS/ODDS (ONA Training for case managers)*** **Physical demonstration:** Able to successfully complete a Needs Assessment.	
125. Basic High Risk Issues *Local only*	Awareness of basic serious, high-risk issues that are commonly encountered in this field.	***Other training provided by DHS/ODDS***	

Re-enter Module 101 to document successful completion of all Tier 1 requirements.

SC/PA Core Competencies Tier 2: *Must be completed within three months of start date*

Module	Competency Statement & Learning Objectives	Instructional & Assessment Expectation(s)	Notes
201. Introduction to Tier 2 Online course	Begin Tier 2 by launching this online module. When you finish all of the online and local requirements for Tier 2, return to this module to acknowledge that you have completed all of the training requirements of Tier 2.	**Online course only**	
202. Individual Support Planning: Services, Desired Outcomes, Risks, and Ancillary Supports Online course	**Services:** Understand that a plan must include the types of services to be furnished, the amount, frequency and duration of each service, and the type of provider to furnish each service.	**Online course** **Local training**: Training on completing an ISP. **Physical demonstration:** Demonstrate ability to complete an ISP.	
	Desired Outcomes: Understand and be able to fulfill the case management role in facilitating the development of meaningful and measurable outcomes within a person's Individual Support Plan (ISP).	**Online course** **Physical demonstration:** Demonstrate ability to complete action plans with meaningful, measurable outcomes.	
	Risks: Understand the case management role of identifying risks and following through to ensure that appropriate supports are offered.	**Online course** **Physical demonstration:** Able to complete ISP showing identification of risks and plans in place to address the risk.	
	Ancillary Supports: Able to connect people to various ancillary supports that may be useful when planning and include in the ISP when necessary.	**Online course** **Oral demonstration:** Discussion with colleague about scenarios when ancillary supports may be effective.	

SC/PA Core Competencies Tier 2: *Must be completed within three months of start date*

Module	Competency Statement & Learning Objectives	Instructional & Assessment Expectation(s)	Notes
203. Guardianships and Informed Consent Online course	**Guardianships:** Demonstrate an understanding of the key differences between various types of legal guardianships and their specific scopes of authority over a person's choice.	**Online course** **Reading:** Guardianship handbook from Disability Rights Oregon.	
	Informed Consent: Understand what informed consent means and case management's role in obtaining it.	**Online course** **Oral demonstration:** Demonstrate ability to help assess whether a person's ability to give informed consent needs to be adjudicated.	
204. Balancing Risks and Choice Online course	Understand the importance of respecting a person's choice and offering alternatives to risky behavior.	**Online course** **Local training:** Conversation with supervisor about responsibilities to address risk. **Reading:** Thinking about Risk by Michael Smull	
205. Monitoring, Follow up, and Ensuring Honesty Online course	**Monitoring:** Understand the case management responsibilities associated with monitoring, including routine monitoring tasks, frequency, documentation requirements, triggers for increased monitoring, and the importance of following up when action is necessary.	**Online course** **Local training:** Local conversation about expectations when monitoring. **Physical demonstration:** Participate in monitoring visits with supervisor or colleague and receive feedback.	
	Following Up with Providers: Understand case management responsibilities when providers are not meeting expectations.	**Online course** **Local training:** Conversation with supervisor about situations where supervisor wishes to be notified. **Oral demonstration:** Demonstrate understanding of how to respond when providers are not meeting expectations.	
	Ensuring Honesty and Integrity: Understand the responsibilities inherent in ensuring honesty and integrity from assessment through planning and delivery of services.	**Online course only**	

SC/PA Core Competencies Tier 2: *Must be completed within three months of start date*

Module	Competency Statement & Learning Objectives	Instructional & Assessment Expectation(s)	Notes
206. Transitions Online course	Understand case management's role in facilitating various types of transitions.	**Online course** **Local training**: Training on your organization's transition checklist or procedures, if applicable.	
207. Cultural Sensitivity Online course	Understand basic cultural sensitivity as it applies to the role of case management.	**Online course** **Local training**: Your organization's cultural competency training. **Oral demonstration:** Conversation with supervisor or colleague about specific cultural considerations at your organization.	
208. eXPRS Plan of Care *Local only*	Knowledge of the case management role in eXPRS Plan of Care.	**Local training:** Learn your organization's procedure for inputting information to eXPRS Plan of Care. Learn ODDS expectations for information inputted to eXPRS Plan of Care. **Physical demonstration:** Demonstrate understanding of procedures for inputting information into eXPRS Plan of Care.	

Remember to re-enter Module 201 to document your successful completion of all Tier 2 requirements.