



# HCBS STRATEGIES, INC.

Improving Home and Community Based Systems

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## Session 3 Approach for the Assessment Development

10.27.2014		In-person
Note taker	Andrew Cieslinski	
Attendees	Tim Cortez, Brittani Trujillo, Kelly Wilson, Grace Herbison, Jason Mizak	
<p><b>Assessment Development Workgroups</b></p> <ul style="list-style-type: none"> <li>Assessment redesign group is a DIDD group that is working to combine both of the adult waivers. Could be a good group to react to the tool items.</li> </ul> <p><u>State Workgroups</u></p> <ul style="list-style-type: none"> <li>Core Tools           <ul style="list-style-type: none"> <li>Charter:               <ul style="list-style-type: none"> <li>Replicating LOC criteria</li> <li>Developing eligibility screen</li> <li>Developing the support planning assessment                   <ul style="list-style-type: none"> <li>Integration with the SIS</li> </ul> </li> </ul> </li> <li>State Staff: Brittani, Tim, Kelly, Jennifer Martinez, Lori Williams</li> </ul> </li> <li>Person-centered Components           <ul style="list-style-type: none"> <li>Charter               <ul style="list-style-type: none"> <li>Development of person-centered module</li> <li>Integration of Experience of Care survey item/NCI and/or Council items</li> <li>Proposed use of the module in operations</li> <li>Integration of person-centered thinking into the Core and employment/participant-direction tools</li> <li>Integration with DIDD person-centered components</li> <li>Training necessary for participants to lead the assessment process</li> </ul> </li> <li>State Staff: Brittani, Kelly, Lauren Stanislaw, Jennifer Martinez</li> </ul> </li> <li>Employment and self-direction           <ul style="list-style-type: none"> <li>Charter               <ul style="list-style-type: none"> <li>Employment module</li> <li>Participant direction module</li> <li>Integration with SIS</li> </ul> </li> <li>State Staff: Brittani, Tim, Kelly, Grace Herbison, Candi Dalton, Roberta Acevez, Michelle Craig</li> <li>Brittani said that the IDD waiver manager is very interested in employment</li> </ul> </li> </ul> <p><u>Stakeholder Groups</u></p> <ul style="list-style-type: none"> <li>Participant-direction advisory council- group of community members, agency staff, and State staff. Meet once each month.</li> <li>DD redesign- Brittani will talk with this group and introduce topics and potential opportunities for involvement and input.</li> </ul> <p><b>Person-centered Approach for Assessment</b></p> <ul style="list-style-type: none"> <li>Tim said that he would be interested in learning more about the uptake rate for consumers around MyPath.</li> <li>Tim would like the MyPath information be able to pull into the PHR and/or be contained within the assessment.</li> <li>Lauren will be trained as a person-centered trainer for the DIDD side and will be training CMs, but beyond that they do not currently have a person-centered effort.</li> <li><i>Need to double check on whether the relationships maps in any of these processes that are being considered are copyrighted.</i></li> <li>Tim said that they are also interested in looking into how well identified goals are met. This could be an important aspect for the reassessment. The information collected and service outcomes in the reassessment may be substantially different from those in the intake/assessment.</li> </ul> <p><b>Assessment Process Flow</b></p> <ul style="list-style-type: none"> <li>The group agreed that individuals with mental health diagnoses would be the ones that would be most vulnerable to falling through the cracks. This population will go through the SEPs.</li> <li>Want to look at during the pilot whether a few additional items could be added to the 100.2 during the pilot and have it incorporated into the normal processes, which Steve called the <b>Level of Care Pilot</b>. This could be done sooner and look at items could be taken out of the eligibility screen.</li> <li><i>Want to think through whether the individuals in the pilot should be those new to the system or those already in the system.</i></li> <li>May look at the overlap with TEFT for the LOC pilot and the Support Planning Assessment (non-IDD) once there is a better picture of how TEFT will function.</li> <li><i>For the case-management workgroup, will want to discuss with them the possibility about setting up, piloting, and using a telephonic screen that could populate to the assessment or other items.</i> <ul style="list-style-type: none"> <li><i>Will also want to ask if there are things that we would not get an appropriate response about from telephone screen.</i></li> </ul> </li> </ul>		

# Meeting Minutes

- *Brittani will double check whether the use of tools/equipment automatically qualifies an individual.*
- Currently, the initial screen is a tentative screen of eligibility, while the assessment is a verification of the information given.
- SEPs go through the screen on the phone, 100.2 and service plan in person, and then send plan off to financial eligibility.
- CCBs, if the person does not have DD determination then they will not begin the process. Then a conversation about the waitlist, then an assessment for the waitlist, then SIS, service plan and eligibility for services.