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Stakeholder Meeting 1: Tool Development Process		
10.28.2014		In-person

Note taker	Andrew Cieslinski
Attendees	Tim Cortez, Brittani Trujillo, Kelly Wilson, Chandra Matthews, Donna Zwierzynski, Charlene Willey, Carrie Schllinger, Heather Jones, Pat Cook, Erin Fisher, Dyann Walt, Sarah Haburn, Robin Bolduc, Kathy Martin, David Bolin, Sarah Roberts, Jennifer Martinez, Jose Torres-Vega, Danielle Dunaway

Overview

- Information already summarized in the presentation is not repeated in the notes. The notes primarily capture stakeholders' feedback and input.

Best/Worst Case Scenario Summary

- Most of the group felt that further discussion of this document was not necessary.
- Charlene Willey said that she had concerns around the SIS remaining as a key piece of the system. She suggested that it may be helpful to discuss the collaborative implementation of the assessment with the SIS, as understanding this component will be key to moving the assessment forward.
  - David Bolin agreed, saying that the SIS is not being used in the way it was intended, and that people will experience a duplicative assessment process. If there is to be a minimization in the number and duplication of tools, it needs to happen now.
    - Brittani Trujillo said that The American Association of Intellectual Disabilities (AAID) is making changes to update the SIS and the CO DIDD is planning enhancements in its use of the SIS to improve its usefulness for support planning.
  - Steve Lutzky said that the group will be working with the Department to identify the best means to integrate the SIS with the new tool and process. He noted that one purpose of this meeting was to discuss the draft workflows to give a better idea of how this might happen.

Core Tool Selection Discussion

- The Department, with strong consideration given to stakeholder feedback, has decided to move forward with MnCHOICES as the core tool with supplemental items from CARE to improve reliability and validity. The rationale is laid out in the Tool Selection Memo, and examples of MnCHOICES modules with CARE items incorporated within them have been drafted and distributed.
  - The group was supportive of this approach.

Assessment Process Flow Discussion

- Steve Lutzky walked through the draft flow of the assessment process.
  - *Pat Cook requested that there be a future in-depth discussion around the phone screen, as the senior markets tend to be intimated by phone screens or have difficulties getting in touch with the appropriate person. Steve emphasized that this process is at the beginning and there will be time for careful consideration of many issues, including this one.*
- Steve said that there will most likely be two versions of the portion of the assessment process collecting information for support planning, one for IDD that will integrate with the SIS, and another that will be more of a stand-alone for the non-IDD population.
  - Individuals will have to select which program direction (IDD vs. non) that they will be going in prior to the support plan assessment portion of the process. There will need to be processes in place to help inform this decision, which may include allowing individuals to revisit the pathway that was chosen.
  - Sarah Haburn said that the current process often involves individuals with IDD signing up for non-IDD waivers because of the waitlists and later switching over. This will need to be a consideration moving forward.
- The draft flow includes an intake and eligibility screen that will likely be brief and will screen for eligibility, assign risk to possibly fast-track some cases and help people determine whether to choose the IDD or non-IDD support planning assessment.
- Pat Cook had a concern around the delay in financial eligibility determinations. She said that they need to have a more reasonable timeframe for blending the financial and functional eligibility so neither get stalled out. This has historically been the biggest barrier to access.
  - Steve Lutzky acknowledged that this was an issue, however, while resolving this is outside of the scope of the assessment redesign effort, the eligibility screen could help to mitigate some of the negative consequences by identifying individuals at greatest risk and allowing them to be fast-tracked.
- Pat recommended including the ability of the system to communicate across agencies and/or to interview the individual during the assessment to establish what other services are being received.
- Pat requested a more in depth discussion about how the new items, which are more reliable for the assessment, will impact eligibility.

- Jose Torres-Vega said that if the new tool is able to be used broadly across populations, it will help to streamline the process and assist decision making for people.
  - This may include skip patterns based on trigger questions that will help direct individuals to the correct area, service, or goal in the least burdensome manner. Steve Lutzky agreed that this could be a good approach and be explored during the development of the tool.
    - Steve also said that there may be questions that could be automatically prepopulated if they are for areas that will not change (e.g., after 22 developing a developmental disability). *This will be further discussed with IT.*
- Pat Cook had a concern about specific items on dementia and wanted to discuss this further as part of the assessment development

Person Centered Items

- Jose Torres-Vega suggested that the personal interview, quality of life, and personal outcomes desired should not be required, as some people view the assessment as a means to obtain services while others may want support and planning.
  - Shirley York said that in other states these questions have not necessarily been required. Steve Lutzky said that while items needed to determine eligibility and budgets will likely be necessary, other items that are used primarily for support planning may be voluntary. Identify which items are voluntary and mandatory will be part of the assessment development process..
- Jose said that in training assessors, it will be important to make clear what questions are required vs. optional. Pat Cook added that motivational interviewing should be a component of training.
- The New Hampshire tool, Look Back, Plan Forward, is an exploratory example of a simple to use automated tool that can be used as an alternative way to share personal information with others as a supplement to the Personal Health Record (PHR).
  - Charlene Willey said that she really liked the tool, and that it would allow information to be easily shared with caregivers.
  - Jose Torres-Vega said that he likes the idea of the automated record, but his main concern would be the privacy and ownership of the record and how it would be shared. He wants to ensure that individuals know the potential risks of completing it.
    - Kelly Wilson said that investigation into how to limit what information is shared with whom is currently being contemplated around the PHR and these answers will help inform the decision around this person-centered tool.
  - **The group agreed that this would be something that they would like to move forward to investigate.**
    - The group did not like the proposed name MyPath, and Steve Lutzky said he would appreciate if they would propose alternative names.

Employment Component

- Shirley York explained that the employment module contained in MnCHOICES is a screen for interest and an identification of preferences and circumstances that impact employment, volunteer opportunities and/or additional education/training. Other tools, such as SIS, delve more into individual skills and needs that affect employment.
- Shirley York said that Minnesota has help options outside of the assessment process around employment. These resources are available both online and via telephone to provide assistance around disability benefits and the impact of various employment options on disability benefits.
  - Pat Cook asked about the possibility for video modules to help inform employment options 24/7. She said that these modules would be especially helpful because they can be done when convenient for the individual and be viewed a number of times. An individual may be directed to these modules by the assessor or case manager.
- Jose Torres-Vega said that regardless of what the employment is or how frequently it is performed, an individual should be able to receive employment assistance and additional supports.

Self-direction Component

- Steve Lutzky proposed that the self-directed component have two purposes: 1) to ensure that self-direction is raised as an option for all individuals and 2) to ensure that if there are concerns about an individual's ability to self-direct, there be a structured conversation that will prevent this option from being dismissed without due consideration.
- Jose Torres-Vega said that CDASS/IHSS has staff and volunteers to assist individuals in managing paper work and other issues related to accessing services, and he would like to see this assistance and advocacy as part of the self-directed component.
- Part of the goal setting could be to allow the individual to take more control of their services, and enabling them to do so and connecting them with supports would part of self-direction.
  - Pat Cook said that this would be another opportunity for video-training modules to help individuals obtain information and realize options.
  - Steve Lutzky suggested looking into how to specifically address self-direction for individuals coming out of nursing homes.
- Self-direction doesn't have to be "all or nothing", as some people won't want to direct certain portions of LTSS. Working toward a protocol to require this discussion to occur is important.
- **Group agreed that there should be a trigger for self-direction.**

Meeting Minutes

Wrap-up and Next Steps

- Pat Cook said that we will need to add revisiting SIS and how it fits into the overall scope as a separate item of the follow-up discussion.
    - Tim Cortez said that discussing the SIS would occur within the working groups.
- Steve Lutzky proposed the structure for the work groups that would assist in providing feedback on the development of the core tool, the person-centered components, employment and self-direction modules.
- Pat Cook said that the interconnectedness of each of the work group areas makes deciding where to spend time difficult, and that she is concerned about time commitment of three different working groups.
    - To address the time concerns, Jose Torres-Vega proposed to not have to have three separate groups, but to have one group that addresses the tool development items in sequential order.
        - Steve Lutzky said that he has concerns spacing these components out because of the short time frame and that some components may be rushed or not build off of ideas of others.
        - Tim Cortez suggested having different groups, including PPPTC and the CFC Council, to address person-centered and employment/self-direction, while this stakeholder group evaluates the main components.
            - Chandra Matthews said that if this occurs, there will certainly need to be some sort of communication mechanism, because the multiple subgroups under CLAG became so split because they lacked intercommunication.
        - Pat Cook said that she would like to address these issues sequentially as Jose proposed. In order to do so and meet the timeline, meetings will need to have very specific tasks to accomplish.
- **Decision was made to keep the one group and review the components sequentially.**
- For the December site visit, Pat Cook said that the 3 hour in-person intensive works well, and that for web-enabled calls early morning is better. Jose Torres-Vega said that 9:30a would be an optimal starting point.
    - 12/15-16 from 930-1230, 12/17 from 9-12.