
Division of Long Term Supports and Services Bureau of Developmental Services

Systems Work Advisory Committee

August 2022

Melissa Hardy



1. Work Group Report Outs

- Waiver Workgroup – Jenn Pineo & Krista Gilbert
- Rate Workgroup – Ellen McCahon

2. Discussion

- BDS personnel updates
- Agenda items for September meeting
- State budget

3. Focus Group Breakouts

- Assessment
- Individual Service Agreement (ISA)



Assessment Focus Group



Assessment Focus Group Agenda

1. Review SIS exceptions reasoning and process flow
2. Brainstorm what the NH SIS exceptions process should look like
3. Additional items from group – open discussion



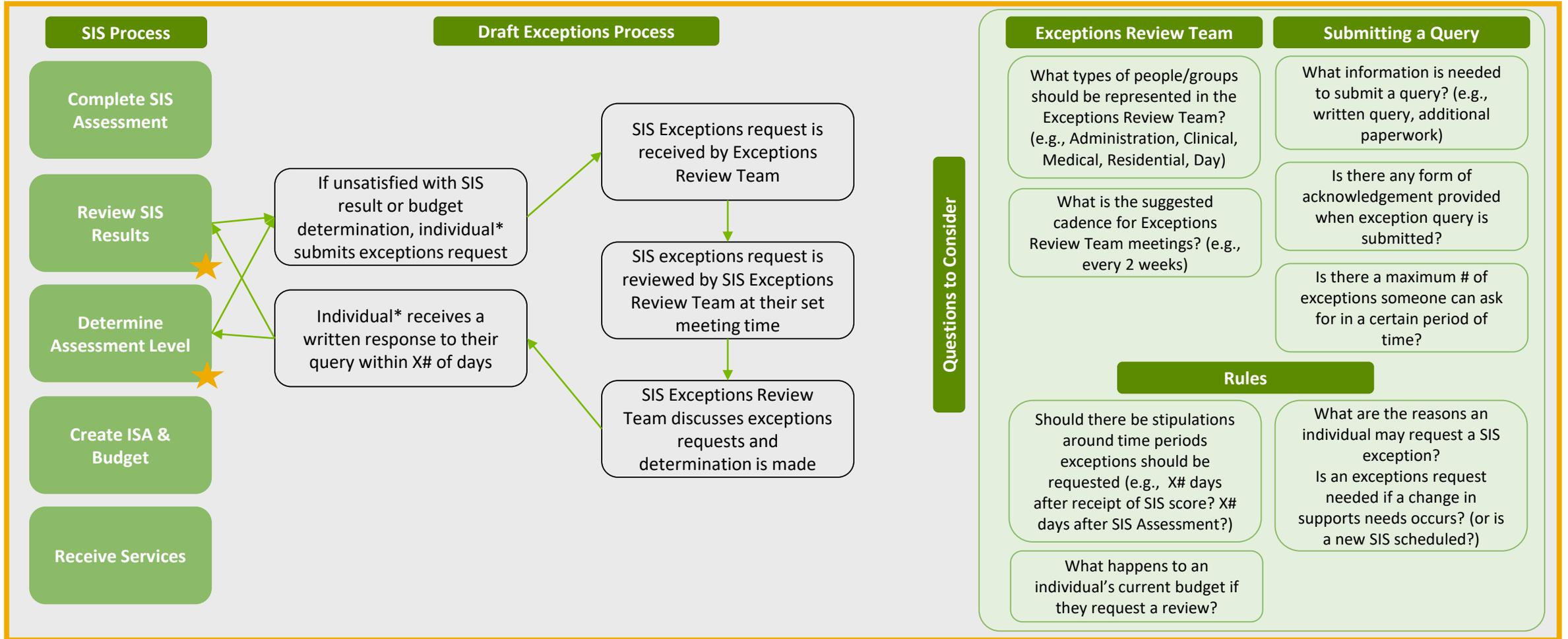
We have the SIS Score – Now What?

- Since the SIS will inform a personal rate, a mechanism needs to be established to provide a standard process for reviewing exceptions requests to SIS scores, which directly feed into individual budget determination.
- This process, while data-driven, is not perfect. While we hope to meet the needs of most individuals based on their assessment and additional factors, it is expected that some individuals may need to adjust their proposed supports. This is expected!
- We want to develop a robust exceptions process so people can indicate if they believe their assigned level is not right. This process should be:
 - ✓ Approachable for families
 - ✓ Manageable for the reviewing team
 - ✓ Not overly bureaucratic (time appropriate)
- This does not replace an official appeals process – this will always be an option for families



What should the SIS exceptions process look like?

We heard last meeting that you want to define an exceptions process. Here is an example framework for the group to work through and tailor for the state of NH



*Individual or their identified representative

★ Steps in process where SIS exceptions can occur

Note: Individuals* always have the option to submit a formal appeal. This process is regulated by CMS



SIS Exceptions Process – Discussion (1/3)

Exceptions Review Team	
Question	Proposed Answer
What types of people/groups should be represented in the Exceptions Review Team? (e.g., Administration, Clinical, Medical, Residential, Day)	Diverse team – Nurse perspective, functional perspective (OT/PT), clinical perspective, family representative (perhaps from a family org), service providers, service coordinator, individual, DSP, administrative support. How many people on team? Possible 7 plus administrative support
What is the suggested cadence for Exceptions Review Team meetings? (e.g., every 2 weeks)	Recommendation: Every two weeks and as needed. To be adjusted based on volume. Coordinate with ISA group on timeline. Information needed after individual's select their services.
Will there be one review team per region or one for the state?	Recommendation: 1 team for the state to ensure consistency
What is the process for review team alternates?	



SIS Exceptions Process – Discussion (2/3)

Submitting a Query	
Question	Proposed Answer
What information is needed to submit a query? (e.g., written query, additional paperwork)	
Will there be a template/form for both the request for exception and the for the Team's review?	
Is there any form of acknowledgement provided when exception query is submitted?	
Is there a maximum # of exceptions someone can ask for in a certain period of time?	



SIS Exceptions Process – Discussion (3/3)

Rules	
Question	Proposed Answer
Should there be stipulations around time periods exceptions should be requested (e.g., X# days after receipt of SIS score? X# days after SIS Assessment?)	
What are the reasons an individual may request a SIS exception? Is an exceptions request needed if a change in supports needs occurs? (or is a new SIS scheduled?)	
What happens to an individual's current budget if they request a review?	



Open Discussion / Prep for Next Meeting

- What else is important to include in the SIS exceptions process?



ISA Focus Group



ISA Focus Group Agenda

1. Housekeeping
 - Reminder of goals and timelines for the group (reviewed on 8/10)
2. Review Current Understanding and Recommendations
 - Recommendation to Date Summary
3. Current ISA Page by Page Review



HOUSEKEEPING



Goals and Timelines – For Reference: Reviewed on 8/10

We are still working towards developing a set of “requirements” for a new ISA to hand off to Deloitte (the IT vendor) in August. This timeline is not flexible. Here’s our timeline, including work BDS took on in July.

July:

- Abby summarized recommendations from the work group and shared with BDS subject matter experts for additional feedback (including the homework takeaways).
- Abby shared preliminary summary with Deloitte for feedback. They requested detailed information about fields.

August:

- The focus group will complete page by page review of the ISA (today – we may revisit some components reviewed in previous meetings)
- The focus group will review feedback from BDS and Deloitte and finalize ISA requirements (next meeting)

September+:

- The focus group will refine our recommendations related to the process and to trainings.

BDS will communicate additional updates this month via email. Reactions?



REVIEW CURRENT UNDERSTANDING AND RECOMMENDATIONS



Recommendations to Date Summary (Updated at August Meetings)

- ~~1. Make emergency contact optional~~
 - ~~■ Clarification: When is this field an option to complete? ISA v.1 or ISA v.2?~~
2. Build in form logic that doesn't assume guardianship (Ex. Create a Y/N option for "Individual has a legal guardian." If "Yes" the contact fields for the guardian pop up.)
3. Create a family friendly summary that includes key definitions such as rep payee
 - Clarification: What other components are important in a family friendly summary? – A rights summary and information about advocacy
 - Clarification: What sort of delivery method would work best? (email from service coordinator, print out, portal, etc.)?
4. Expand on the PDMS education and responsibilities acknowledgement in the planning process attestation (currently Q2 in the "Planning Process Acknowledgement Form") – Helpful, but requires dedicated time



Recommendations to Date Summary (Updated at August Meetings)

5. Would like future-state process to include a pre-meeting/ time to digest information before finalizing the ISA
6. Final attestation/ checklist of process steps completed, services requested, etc.



Continue Current ISA Review



Current ISA

The current ISA is approximately 20 pages and covers the following information...

1. General Information: Contact information, meeting logistics, guardian information, family information	8. Residential Services: Provider, services to be provided
2. Diagnoses: Allergies, diagnoses listing	9. Behavioral Health Services: Provider, services to be provided
3. Guardianship: Application process, type of guardianship, comments	10. Day Services: Provider, types of services
4. Rep Payee: Contact information, description of money distribution process, planning process acknowledgement form	11. Goals: Status description and update, documentation of new goals
5. Personal Profile: Personal history, personal statement (strengths, interests, dreams, vision), personal statement pt.2 (challenges, needs, etc.), review of last year	12. Service Satisfaction: Description of services not available
6. Clinical Information: Health needs, SIS C, SIS A, HRST, discussion of needs,	13. Participant's of Meeting: Names and roles, approvals
7. Services to be provided No guiding selections	



Appendix



Homework Summary

Thanks for returning your homework. Some key themes emerged from your responses. Your feedback is paraphrased below.

Strengths

- 1. **Contains goal information.** Multiple respondents praised the current ISA template for including information about a person’s goals. One respondent noted that this information should expand. Another recommended the goals become SMART goals.
- 2. **Contains service satisfaction information.** Multiple respondents praised the included of a service satisfaction section.
- 3. **Useful Structure.** Multiple respondents noted the current usability of the ISA and its structure including the form’s ability to meet multiple compliance requirements and to pull in information from other sources.

Opportunities

- 4. **Family-friendly information.** Multiple respondents noted an opportunity to increase the amount of family-friendly/ educational material included in the ISA.
- 5. **Contains duplication.** Multiple respondents pointed out instances of duplication in the ISA, where similar information is asked for multiple times.
- 6. **Opportunities to improve the user interface(UI).** Multiple respondents identified ways to make the form easier for service coordinators to use, including better text entry features and more robust data linkages.

“Strength 1: Personal profile (but it could be strengthened)”

“Service satisfaction – expand this area as well.”

“The items pull from the previous ISA to build off of,”

“All like information needs to be in the same section.”

“Redundancies created due to some profiles being unclear as to how they differ...”

“The autosave feature is not always reliable.”



Specific Recommendations from Homework Submissions

To improve the structure:

1. Model fields off of the “trajectory” tool
2. If the “basic” service agreement will be allowed, create a shorter version

To make completion less burdensome:

1. Make start and end dates carry throughout the ISA (allow service coordinator to change if needed)
2. Improve the match to the “functional screen”
3. Develop better signature saving/ populating features
4. Add QSS auto populate feature
5. Remove duplication in challenges, challenging behavior, and safety considerations
6. Remove duplication in section 6,7,8,9, 10
7. Remove duplication in section 5 and 6 (personal history, personal statement, health needs)
8. Remove duplication in guardian details

To improve the individual and family experience:

1. Develop addendums for family-friendly information
2. Add a field to capture how a goal meets a personally identified outcome
3. Add a separate health section that would include health history, current status, health concerns, supports needed for health
4. Upload person-centered planning documents as supporting attachments
5. Add to section 6, “Discussion regarding need for... Home Modifications and Modified vehicle”
6. Remove the process acknowledgement page
7. Pg. 8-9: Change “level of supervision” to “level of support”
8. Add under medication administration as a box for Parent/ Guardian/ Family Designee
9. Expand narratives in section 5

Let's discuss and refine these recommendations.



Planning Process and Statutory Impacts

BDS must develop an ISA that aligns with current statute which has timeline requirements about what information must be included at certain points in the process.

