

Lilia Teninty  
**Authorized signature**

**Number:** APD-AR-16-066  
**Issue date:** 9-16-16

**Topic:** Developmental Disabilities

**Due date:**

**Subject:** Maintenance Job Coaching Rate Request

**Applies to (check all that apply):**

- |  |  |
|--|--|
| <input type="checkbox"/> All DHS employees                     | <input type="checkbox"/> County Mental Health Directors  |
| <input type="checkbox"/> Area Agencies on Aging                | <input type="checkbox"/> Health Services   |
| <input type="checkbox"/> Aging and People with Disabilities    | <input checked="" type="checkbox"/> Office of Developmental Disabilities Services(ODDS)                  |
| <input type="checkbox"/> Self Sufficiency Programs             | <input type="checkbox"/> ODDS Children's Intensive In Home Services                                      |
| <input checked="" type="checkbox"/> County DD Program Managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)  |
| <input type="checkbox"/> ODDS Children's Residential Services  | <input checked="" type="checkbox"/> Other ( <i>please specify</i> ): Brokerage Directors/Personal Agents |
| <input type="checkbox"/> Child Welfare Programs                |  |

**Reason for action:**

In order to implement new Job Coaching rates for provider agencies and organizations based on the rate study conducted by Burns and Associates, ODDS had to negotiate and implement policy regarding the Maintenance Job Coaching rate.

The Job Coaching rates implemented September 2014 were based on the hours the supported individual worked, rather than the hours provided by a job coach. This type of outcome payment will continue with the implementation of the new rates. This outcome rate is designed to increase the hours the individual works and increase their ability to work independently by incentivizing fading by the job coaches and employment organizations. With the new rates to begin 11-1-2016, a new phase of this rate methodology will be included: Maintenance Job Coaching.

Maintenance Job Coaching continues to be paid based on the hours the individual works. The intent of Job Coaching is to fade out paid employment supports and implement natural supports. However, in some instances Job Coaching may continue to be needed by the individual. In the event that the individual and their employment team believe they still need Job Coaching support at the end of On-Going Job Coaching, the Services Coordinator (SC) or Personal Agent (PA) may request Maintenance Job Coaching as outlined in the Job Coaching Requirements Worker

Guide.

**Action required:**

As the original rate methodology for Job Coaching, including Initial and On-Going Job Coaching began in September 2014, this Maintenance Job Coaching applies to individuals who have received On-Going Job Coaching since September 2014. This means that if an individual has already received 18 months of On-Going Job Coaching since September 2014, the maintenance rate must be requested immediately if Job Coaching is still the appropriate service.

In order to give time for request and review, for anyone who has already received 18 months of On-Going Job Coaching, or will have received 18 months of On-Going Job Coaching on or before February 1, 2017 the requests must be submitted on or before December 1, 2016. This will allow two months for requests to be generated, and two months for ODDS to review to ensure there is no lapse in service. ODDS will be issuing lists to CDDPs/Brokerages regarding who has received 18 months of on-going Job Coaching within 2 weeks of this transmittal issue date. On-going this will need to be monitored by the CDDP/Brokerage and should be something that is discussed during an individual's annual planning process.

Moving forward, ODDS must receive the request for Job Coaching at least 30 days prior to the expiration of On-Going Job Coaching to ensure timely approval of Maintenance Job Coaching.

**Procedure for Requesting the Maintenance Rate:**

To request the Maintenance Job Coaching rate the Services Coordinator or Personal Agent should authorize Maintenance Job Coaching in POC. The authorization will pend for ODDS approval, similar to Employment Path Facility. After authorization in Plan of Care, the Services Coordinator or Personal Agent must submit the individual's Career Development Plan and justification to [MaintenanceJobCoaching.Request@state.or.us](mailto:MaintenanceJobCoaching.Request@state.or.us) . The justification must include:

- The name and prime of the individual;
- The name of the provider;
- How long the individual has been supported in their current job;
- Information regarding how job coaching has been stepped down and/or the job coach has faded (or attempted to fade) and the result (for instance, if fading had been attempted in the past and not successful, explain why, or if step down has started but is not yet complete, explain how that process has worked);
- A description of the coaching supports the individual still needs to continue to be successful at work (and how this varies from ADL/IADL support);
- How long the Maintenance Job Coaching rate is being requested (may be up to

one year);

- The proposed plan (such as a Desired outcome with associated key steps, provider implementation strategy, or description) for the job coach to provide supports; and implement skills/natural supports to allow the job coach to fade;
- A description of the job coach's needed communication with the individual at work including the individual's supervisor and if applicable, key co-workers; and
- How the service will be monitored;

Much of this information will need to be discussed with the employment team, including the individual's provider and job coach. Beginning this process early may be required in order to gather this information from the team. In order to facilitate this conversation, ODDS is providing a form (attached). This form may be completed at a team meeting and submitted with the request, along with any supporting documents. This information may also be outlined in the body of the e-mail to ODDS. ODDS will not be able to approve this request without all of the required information. Please ensure all information is included.

ODDS will review the request within the required 30 days. Upon ODDS approval, the plan will be moved to accepted status within 5 business days. In the event that Job Coaching is not approved and authorized, the Services Coordinator or Personal Agent will be informed.

In the event that ODDS does not approve Maintenance Job Coaching, ODDS will issue a notice to the individual. If ADL/IADL is the most appropriate service, even though the Maintenance Job Coaching rate is being denied, the individual may still continue to receive support through ADL/IADL. This notice will include the justification, information regarding other services such as ADL/IADL as well as informal and formal hearing rights. ODDS will inform the SC/PA of the outcome of any subsequent hearing as a result of this notice.

**Field/stakeholder review:**       Yes       No

**If yes, reviewed by:**

*If you have any questions about this action request, contact:*

<b>Contact(s):</b>	Acacia McGuire Anderson		
<b>Phone:</b>	503-947-5099	<b>Fax:</b>	
<b>Email:</b>	<a href="mailto:Acacia.mcguireanderson@state.or.us">Acacia.mcguireanderson@state.or.us</a>		



## Maintenance Job Coaching Request

### Demographic Information

Please complete the following information regarding the individual who is requesting Maintenance Job Coaching Supports.

Last Name:	First Name:
Prime Number:	
Job Coaching Provider Name:	

### Maintenance Request and Justification

Please include as much information as possible to explain the individual's need to continue Job Coaching using the Maintenance Job Coaching rate. This should include information discussed with the individual and their Employment Team. Please attach any additional documentation such as the individual's ISP/CDP, Provider Implementation Strategies, etc.

How long has the individual been supported in their current job:

How has job coaching been stepped down or faded out (for instance, has the team or provider attempted to subsequently provide less job coaching over time)? What were the results? Please explain how the process has worked and if attempted, why it was not completed.

What type of job coaching supports does the individual need to continue to be successful at work (please see Job Coaching Worker Guide, OAR 411-345 and expenditure guidelines for additional information on approved job coaching supports)? Please also explain why Job Coaching is the primary support needed rather than ADL/IADL:

For how long is the Maintenance Job Coaching rate being requested (may be requested up to 1 year):

What is the proposed plan for how the job coach will implement skills or build natural supports to allow the job coach to fade? This may include documentation in a Desired Outcome with associated key steps, provider implementation strategies, or other form or description.

Please give a description of the Job Coach's communication with the individual at work, including the individual's supervisor, and if applicable key-coworkers:

How will the service be monitored going forward?

<b>Topic:</b>	Job Coaching Requirements
<b>Date Issued/Updated:</b>	11.1.2016

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## Overview

**Description:** Implementation of the new Job Coaching Policy, including new Initial, Ongoing and Maintenance Job Coaching rates for Provider Agencies. This Worker's Guide describes the requirements for authorization of the service, contact and billing.

**Purpose/Rationale:** ODDS is implementing new Job Coaching Rates. The Job Coaching rates implemented in September 2014 were based on the hours the supported individual worked, rather than the hours of direct service provided by a job coach. This type of outcome payment will continue with the implementation of the new Job Coaching rates. This outcome rate is designed to increase the hours the individual works and increase their ability to work independently by incentivizing fading by job coaches and employment organizations and increase the individual's skills to work independently or replace their support with natural support. This Worker's Guide outlines the requirements that must be met for a provider to bill Job Coaching.

**Applicability:** The Job Coaching Rate Policy Worker's Guide applies to Provider Organizations who provide Job Coaching services and to CDDPs/Brokerages who authorize Job Coaching hours.

This Job Coaching Rate Policy Worker's Guide applies only to the provider agency rates and therefore *does not apply to PSW Job Coaches*. The nature of work performed by PSWs requires direct contact for all hours billed. PSW Job Coaching rates and requirements are outlined in the Collective Bargaining Agreement and can be found in the Expenditure Guidelines.

## Procedure(s) that apply:

The Initial Job Coaching rate paid through ODDS is valid for the first 6 months for which an individual receives Job Coaching at an integrated job. This time includes any Job Coaching already provided through Vocational Rehabilitation (VR). For instance, if an individual receives Job Placement services through VR and receives Job Coaching supports through VR for the first 60 days or two months on the job, the Initial Job Coaching rate would only continue to be applicable for 4 additional months. In this scenario, a Services Coordinator (SC) or Personal Agent (PA) may only authorize 4 months of Initial Job Coaching in Plan of Care.

The On-going Job Coaching rate paid through ODDS is valid for the next 18 months for which an individual receives Job Coaching at a competitive, integrated job. If the person does not need the level of support required by a Job Coaching rate, after discussion with the person

and the provider, the SC or PA should authorize the most appropriate Job Coaching rate. There is no need to wait until a person uses the maximum time available to them in a Job Coaching rate.

These timelines apply beginning the date the Job Coaching service begins. Therefore, if an individual has already received 12 months of On-going job coaching, they will only be eligible to continue On-going Job Coaching for 6 months to reach the total of 18 months. As this rate methodology has been in place since September 2014, this policy does apply to those who used job coaching as of September, 2014.

The Job Coaching rate is based on the hours the supported individual works. Therefore, in order to bill the initial rate the provider must provide at least four face-to-face contacts per month. In order to bill the On-going Job Coaching rate the provider must provide at least two face-to-face contacts per month.

Job Coaching may be billed daily, weekly or monthly as decided by the provider. However, ODDS will verify through Plan of Care (POC), the Employment Outcome System (EOS) and other means as needed to ensure direct contact is provided. If a provider bills daily at the start of a month, but does not meet the direct contact requirement prior to the end of the month, the billing must be reconciled.

If the provider does not make the required contacts during a month, they may not bill the Job Coaching rate for that month. This provider may bill in the subsequent months without re-authorization. However, if no face-to-face contact is made with an individual for three consecutive months the provider organization must inform the SC or PA and initiate a team meeting to see what on-going support is the most appropriate for the individual and if these supports continue to be needed.

Both Initial and On-Going Job Coaching are time-limited. Initial may only be authorized and provided for up to 6 months and on-going for up to 18 months (these are the maximums). The support required by an individual may change more quickly than as outlined. For instance, an individual may only need 6 months of On-Going Job Coaching and then may require less frequent contacts. If this is the case, the authorized service would change from On-Going Job Coaching to Maintenance Job Coaching in the individual's Career Development Plan (CDP) and POC if approved by ODDS.

If during the team meeting it is discovered that the individual does continue to require Job Coaching but with less frequent contact than each month, the SC or PA should authorize the Job Coaching stage which most appropriately matches the individual's support needs. For instance, if the individual requires only two face-to-face contacts per month rather than four, on-going would be more appropriate than initial, so on-going may be authorized. If the individual requires contact, but not monthly, the Maintenance Job Coaching rate may be requested from ODDS.

The rate is based on the hours the person works and therefore the rate may not be billed for times the person does not work, even if the employer pays them for those hours. Examples include sick/vacation time, maternity leave, funeral leave and jury time.

Upon approval from ODDS the Maintenance Job Coaching rate may continue for 12 months so

long as the individual continues to require job coaching supports including support to help an individual maintain their job as outlined in OAR 411-345. The maintenance rate may be requested annually as requested by the individual and their employment team.

If the individual's primary support requirement is ADL/IADL as outlined in OAR 411-450, ADL/IADL should be authorized rather than the Job Coaching service. For instance, if an individual is able to perform their job independently but requires some assistance with eating their lunch, ADL/IADL may be authorized for support during lunch. Please see below for the definition of ADL/IADL and Job Coaching.

Job Coaching must be provided as authorized in an individual's plan (ISP/CDP, Provider Implementation Strategies, Service Agreement, etc.). If the team determines that the individual wants and needs 6 monthly direct contacts and this is outlined in the individual's plan the provider must provide 6 monthly direct contacts. If these contacts are not provided the same billing procedures would apply as described above and the team must document why and make any changes in the CDP.

If it is determined up front that a step down plan (or plan to fade) will be utilized, a step down plan may be written into the plan (i.e., the first three months will require 3 contacts, the next three months 2 contacts and the last three months 1 contact) during the ISP meeting or during any subsequent discussion regarding the CDP and Job Coaching. This can be done via the "key steps" portion of the CDP, or through Provider Implementation Strategies. Otherwise if changes are made to the direct contact requirements, this update to the CDP may be made through an ISP change form.

In the event that an individual is no longer receiving a Job Coaching service and requires Job Coaching due to a change in supervision at their job, a change in the individual's life or needs, a change in job requirements, etc., the Services Coordinator or Personal Agent may authorize the Maintenance Job Coaching rate for 30 days without prior approval from ODDS. If it is anticipated that Maintenance Job Coaching will need to be provided for more than 30 days, the Maintenance Job Coaching rate must be requested to be re-implemented as outlined in the Maintenance Job Coaching Rate transmittal AR 16-066. If an individual requires more than 30 days of Maintenance Job Coaching, or re-enters Maintenance Job Coaching more than 2 times in one year, even if it is for less than 30 days, the SC or PA must request this service be authorized by ODDS. For instance, if an individual requests Maintenance Job Coaching, fears their job is at risk or the Employment Team determines that an individual's job is at risk and they need to re-implement Job Coaching, a SC or PA may authorize this service in POC for up to 30 days without prior approval, two times per year. Upon the third request, before authorization, the maintenance rate must be requested and authorized by ODDS.

**Conditions for the Maintenance Rate:** Upon approval from ODDS the Maintenance Job Coaching rate may continue for up to 12 months so long as the individual continues to require Job Coaching supports including support to help an individual maintain or advance in their job as outlined in OAR 411-345. The maintenance rate may be requested by the SC or PA annually as requested by the individual and their employment team.

The Maintenance Job Coaching rate may be requested as long as the individual continues to require Job Coaching supports including support to help an individual maintain or advice in their job as outlined in OAR 411-345. If the individual's primary support requirement is

ADL/IADL as outlined in OAR 411-450 (see below), then ADL/IADL should be authorized rather than the On-going Job Coaching rate.

In order to align the request for Maintenance Job Coaching with an individual's ISP date when possible, this request may be made in advance by as much as 6 months and should be made in advance by at least 1 month. For instance, if an individual will exhaust their available On-Going Job Coaching (i.e., use all 18 months) as of July 1 and their annual ISP is due January 1, this request for Maintenance Job Coaching may be made as early as January 1 to begin in July (up to 6 months before it is required) and must be made by June 1 (at least 1 month before it is required) to begin in July.

Given that this rate methodology originally rolled out in September 2014, this policy applies to individuals who have received Job Coaching since September 2014. This means that if an individual has already received 18 months of On-going Job Coaching, the maintenance rate must be requested immediately if Job Coaching is still the appropriate service.

### **Procedure for Requesting the Maintenance Rate:**

To request the Maintenance Job Coaching rate the Services Coordinator or Personal Agent should authorize Maintenance Job Coaching in POC. The authorization will pend for ODDS approval, similar to Employment Path Facility. After authorization, the Services Coordinator or Personal Agent must submit the individual's Career Development Plan and justification to [MaintenanceJobCoaching.Request@state.or.us](mailto:MaintenanceJobCoaching.Request@state.or.us). The justification must include:

- The name and prime of the individual;
- The name of the provider;
- How long the individual has been supported in their current job;
- Information regarding how job coaching has been stepped down and/or the job coach has faded (or attempted to fade) and the result (for instance, if fading had been attempted in the past and not successful, explain why or if step down has started but is not yet complete, explain how that process has worked);
- A description of the job coaching supports the individual still needs to continue to be successful at work (and how this varies from ADL/IADL);
- How long the Maintenance Job Coaching rate is being requested (may be up to one year);
- The proposed plan (such as a Desired Outcome with associated key steps, provider implementation strategy, or description) for the job coach to provide supports and implement skills/natural supports to allow the job coach to fade;
- A description of the job coach's communication with the individual at work including the individual's supervisor and if applicable, key co-workers; and
- How the service will be monitored.

Much of this information will need to be discussed with the employment team, including the individual's provider and job coach. Beginning this process early or as part of the planning process should help facilitate this conversation. Note, if ADL/IADL is the most appropriate service, even though the Maintenance Job Coaching rate is being denied, the individual may still continue to receive support through ADL/IADL.

Upon ODDS approval, the plan will be moved to accepted status within 5 business days. In

the event that Job Coaching is not approved and authorized, the Services Coordinator or Personal Agent will be informed.

In the event that ODDS does not approve Maintenance Job Coaching, ODDS will issue a notice to the individual. This notice will include the justification, as well as informal and formal hearing rights. ODDS will inform the SC/PA of the outcome of any subsequent hearing as a result of this notice.

### Form(s) that apply:

*Career Development Plan*

### Definition(s):

*Activities of Daily Living (ADL):* Attendant services and supports to assist an individual in accomplishing activities of daily living, instrumental activities of daily living and health related tasks through hands-on assistance, supervision, or cueing. ADL is a term used to refer to daily self-care activities within an individual's place of residence, in the community, or both. These are the most basic activities necessary for daily life, and include the following:

- Basic personal hygiene;
- Toileting, bowel, and bladder care;
- Mobility, transfers, and repositioning;
- Nutrition;
- Medication administration and use of medical equipment; and
- Delegated nursing tasks.

IADL activities are not necessary for fundamental functioning, but they let an individual live more independently in a community. These activities are more complex and include but are not limited to:

- Light Housekeeping;
- Grocery and other shopping necessary for the completion of other ADL and IADL tasks;
- Laundry;
- Meal Preparation; and
- Chore Services

*Direct Contact:* Direct contact, for the purposes of this Worker's Guide, requires face-to-face service delivery. This face-to-face service does not have to be provided on the job if the individual or the individual's employer prefers that coaching be done off-site. However, it does require face-to-face contact between the individual and the job coach.

*Job Coaching:* Per OAR 411-345, Job coaching is "Support to assist an individual to maintain an individualized job in a competitive integrated employment setting in the general workforce, including customized employment or self-employment." Examples of this may include:

- Helping the new employee learn the job;
- Coordination with a residential provider, transportation provider, or other natural support to ensure supports are in place so that the individual is successful on the job (such as ensuring support to arrive at work on time, ensure proper hygiene, work clothing is laundered and ready, etc.)

- Coordinating with others who support the person with services such as behavioral, or medical;
- Assisting the employee to develop work appropriate relationships with supervisors and co-workers;
- Collaborating with the employee and employer to develop natural supports; or
- Support to increase hours

Job Coaching does not include provisions of ADL/IADL supports, assistance with medical appointments, observation of an individual's status and reporting, first aid and handling emergencies, cognitive assistance or emotional support, or social support around socialization.

### Reference(s):

Expenditure guidelines  
PSW Collective Bargaining Agreement  
OAR 411-345  
OAR 411-450

### Frequently Asked Questions:

### Contact(s):

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[acacia.mcguireanderson@state.or.us](mailto:acacia.mcguireanderson@state.or.us)