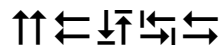


A Conference for Services Coordinators and Personal Agents



March 6, 7 & 8th 2007

Cascade Hall
State Fair Grounds
2330 17th Street NE
Salem, Oregon

The art of progress is to
preserve order amid change
and to preserve change
amid order.

Alfred North Whitehead

We cannot adopt the way of
living that was satisfactory
a hundred years ago. The
world in which we live has
changed, and we must
change with it.

Felix Adler

Change is the law of life.
And those who look only to
the past or present are
certain to miss the future.

John F. Kennedy

Sponsored by:
Seniors and People with Disabilities

**Special thanks to the
various ODDS staff for quickly organizing this conference**

CONFERENCE AGENDA

Tuesday, March 6, 2007

8:00 - 8:15 Registration → Services Coordinators
Cascade Hall Foyer, State Fairgrounds

8:15- 8:45 Welcoming Address: → *Cascade Hall*
Legislative and Budget Updates PLUS a CMS Recap!
Mary Lee Fay

9:00-9:50	1 MMIS & Foster Care - The first change! <i>Julie Harrison</i> <i>Barb Southard</i>	2 State Delivered Children's Services <i>Debra Burke</i> <i>Debbie Kraus Dorn</i>	3 Common Elements of Quality Support Plans to Kids <i>Toni Larson</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>
10:00 to 10:50	4 Legislative Planning and Updates: Children <i>Janette Williams</i>	5 Opening a Child in Foster Care <i>Jay Clark</i> <i>Carol Hitchins</i> <i>Diana Jacobsen</i>	6 A QA Overview: 6 Assurances and the County's Role <i>Dawn Andersson</i> <i>Don Fries</i> <i>Dana Messman</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>
11:00 to 11:50	7 Financial System Monitoring <i>Jim Ransom</i>	8 Proctor to Foster Care "Step Down" <i>Diana Jacobsen</i> <i>Darlene Okeeffe</i>	9 DD Eligibility Q & A <i>Kathy Richards</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>

Lunch on your own
(Sandwiches are available on site for a reasonable charge)

1:00 - 1:50	10 ReBAR <i>Bob Clabby</i>	11 Adult Proctor Care <i>Laurie Lindberg Darlene Okeeffe</i>	12 Children's Residential: Talking to Parents about 24 Hour Residential Care <i>Debbie Kraus Dorn</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>
2:00 - 2:50	13 Personal Care 20 - When, Where, Why, How? <i>Diana Buell Kerry Cornell Toni Larson</i>	14 SERT: How the System Can be Utilized for Quality Assurance Purposes <i>Dana Messman</i>	15 Cracker-Barrel with ODDS Regional Coordinators <i>Kristine Duffy, Mariah Forrest, Julie Harrison, Mike Maley, Jessie Martin, Darlene Okeeffe, Ken Ralph, Claudia Zamora</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>
3:00 - 3:50	16 The Importance of Financial Reporting <i>Angel Bringelson Kristine Duffy</i>	17 Tools for Person Centered Approaches <i>Teresa Kelley</i>	18 Home Alone Status <i>Barb Southard</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>
4:00 - 4:50	19 Overview of DD Funding/ Contract Processes & Structure <i>Julie Harrison</i>	20 Services Coordinators Role in Authorizing and Monitoring the ISP <i>Marilee Bell Laurie Lindberg</i>	21 Behavior Consultation: Scope and Purpose <i>Tracy Anderson Zac Carr Toni Larson</i>
	<i>Santiam</i>	<i>McKenzie</i>	<i>Willamette</i>

Wednesday, March 7, 2007 ↕↔

8:00 - 8:15 Registration → Services Coordinators & Personal Agents
Cascade Hall Foyer, State Fairgrounds

8:15- 8:45 Welcoming Address: → *Cascade Hall*

A Look at our Changing Service Delivery System

James Toews

<p>9:00 - 9:50</p>	<p>1 RN Delegation <i>Gretchen Thompson</i></p> <p><i>Santiam</i></p>	<p>2 People with DD and the Legal Systems they Encounter <i>Mary Claire Buckley</i> <i>Lee Savage</i></p> <p><i>McKenzie</i></p>	<p>3 Complaints/Grievances and the Hearings Processes <i>Marilee Bell</i> <i>Janet Straw</i></p> <p><i>Willamette</i></p>
<p>10:00 to 10:50</p>	<p>4 Strategies for Successful Facilitation <i>Teresa Kelley</i></p> <p><i>Santiam</i></p>	<p>5 People with DD and the Legal Systems they Encounter (part 2) <i>Mary Claire Buckley</i> <i>Lee Savage</i></p> <p><i>McKenzie</i></p>	<p>6 Turning 18: What Families & Young Adults Need to Know <i>Tracy Anderson</i> <i>Darlene Okeeffe</i> <i>Brokerage rep</i></p> <p><i>Willamette</i></p>
<p>11:00 to 11:50</p>	<p>7 IDEA/HS/IEP</p> <p><i>Santiam</i></p>	<p>8 Can we Really Change the World? A Briefing on the Work of the AG's Sexual Assault Task Force's DD Initiative <i>Brie Atkins</i> <i>Eva Kutas</i></p> <p><i>McKenzie</i></p>	<p>9 Successful Referral Processes for People Entering Brokerages <i>Kathleen Bond, Jill Ferns, Mary Foster</i> <i>Martin Hager, Deborah Johnson, Mike Parr, Tom Racioppo</i></p> <p><i>Willamette</i></p>

Lunch on your own

(Sandwiches are available on site for a reasonable charge)

1:00-1:50	10 Understanding Guardianship <i>Elaine Friesan Strang</i>	11 Family Dynamics & Self Direction: Customers Moving to Independence <i>Ann Blackburn Cindy Helvington</i>	12 Working with Mental Health for People with Co-Occurring Diagnoses <i>Cheryl Applegate Gary Cornelius Rick Hammel Al Levine, Shelly Reed</i>
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Santiam

McKenzie

Willamette

2:00-2:50	13 Implementing Illness Management Into Community Support <i>Deborah Cateora Helen Emmons(?)</i>	14 Trust Building and Reciprocity <i>Roberta Dunn Angela Jarvis Holland</i>	15 Medicaid Fraud <i>Rodney Hopkinson Sheen Wu</i>
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Santiam

McKenzie

Willamette

3:00-3:50	16 Relationship Building Between Providers, Services Coordinators & Personal Agents	17 Understanding OHP 101: For Services Coordinators & Personal Agents <i>Toni Larson Donna Weaver</i>	18 Crisis <i>Chris Danish, Kristine Duffy, Claire Weiss, Treven Whitney</i>
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Santiam

McKenzie

Willamette

4:00-4:50	19 Emergency Preparedness Planning: Keeping People Safe <i>Ken Ralph Connie Saldano</i>	20 Criminal History Checks: Commonly Asked Questions	21 Crisis (continued) <i>Chris Danish, Kristine Duffy, Claire Weiss, Treven Whitney</i>
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Santiam

McKenzie

Willamette

8:00 - 8:15 Registration → Services Coordinators & Personal Agents
Cascade Hall Foyer, State Fairgrounds

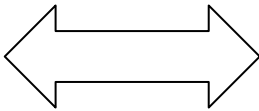
8:15- 8:45 **Welcoming Address:** → *Cascade Hall*
**The Changing Face of Our Infrastructure:
 The Challenges and Anticipated Benefits**
Cathy Cooper

9:00 - 9:50	1 Application of Technology & Implementing Services <i>Phyllis Petty?</i>	2 Tools for Person Centered Approaches <i>Teresa Kelley</i>	3 Working Together to Solve Sticky Challenges in Brokerage/County Relationships: Ideas on Best Practices <i>Eva Kutas</i>
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Santiam

McKenzie

Willamette

10:00 to 10:50	4 Problem Solving & Resolution Skills for Facilitators <i>Teresa Kelley</i>		5 Prepare to Care: Supporting Aging Care Givers <i>Judy Bowen</i>
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Santiam

Willamette

11:00 to 11:50	6 Good to Great Concepts <i>Teresa Kelley</i>	7 What Can a Behavior Consultant Provide? <i>Mary Anne Seaton</i>	8 Helping to Navigate the DSO & SSI systems <i>Carol Mauser</i>
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Santiam

McKenzie

Willamette

Lunch on your own

(Sandwiches are available on site for a reasonable charge)

1:00 to 2:30	9 "The Goal Loop" <i>Diana Buell, Mike Maley, Mike Parr, Tom Racioppo, Janet Straw</i>
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Cascade Hall

2:45 to 4:15	10 Cracker-Barrel for Personal Agents <i>Diana Buell, Mike Maley, Mike Parr, Tom Racioppo, Janet Straw</i>
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Cascade Hall

Tuesday, March 6, 2007

8:15 – 8:45 Welcome **Cascade Hall**

Legislative and Budget Updates PLUS a CMS Recap!

Mary Lee Fay

1. **MMIS & Foster Care- The First Change!**

Julie Harrison, Barb Southard

Santiam

2. **State Delivered Children's Services**

Debra Burke, Debbie Kraus Dorn

McKenzie

This session will provide an overview of state delivered services to children, including Children's Residential; Children's Intensive In-Home Services (CIIS) and the Medically Fragile Unit (MFCU). The session will focus on the roles of State and County Services Coordinators.

3. **Common Elements of Quality Support Plans to Kids**

Toni Larson

Willamette

This interactive session will examine examples of plans developed for children. What are the common elements that help to make a really good plan?

4. **Legislative Planning and Updates**

Janette Williams

Santiam

Hear the updates on proposed legislation and policy issues specific to children this legislative session. There will be time for general questions and answers regarding children's issues as well.

5. **Opening a Child in Foster Care**

Jay Clark, Carol Hitchins, Diana Jacobsen

McKenzie

This session will focus on the details of activities, timelines and reasoning behind all that must be done to open a child in foster care. The session will include updates on new processes and forms. Included in the discussion will be an overview of the SSI application process that is completed by SPD for children entering into residential services.

6. **A QA Overview: 6 Assurances and the County's Role**

Dawn Andersson, Don Fries, Dana Messman

Willamette

This session will provide a high-level overview of Medicaid, the 6 Quality Assurances and CMS's expectations of the State Medicaid Agency and County Developmental Disability Programs. Discussion will include how we as partners will be held accountable for meeting these six assurances in the very near future.

7. **Financial System Monitoring**

Jim Ransom

Santiam

As a Services Coordinator, the task of twice annually monitoring an individual's finances is a part of your routine job. However, the task is far from routine! In this session, you will have the opportunity to hear the strategies for monitoring finances through the lens of a licensing specialist. Hear from his perspective the most critical elements that need attention, and strategies for completing a thorough review.

8. Proctor to Foster Care “Step Down”

Diana Jacobsen, Darlene Okeeffe

McKenzie

This session will review items that need to be covered when a child is moving from proctor care level of services to foster care services while staying in the same foster home. Forms will be identified that will assure this process will occur with minimal disruption to the child and the foster care provider.

9. DD Eligibility Q & A

Kathy Richards

Willamette

Have you always wondered how the eligibility grievance process works and what your responsibilities are? Do you know what happens when kids are found no longer eligible for DD services? Have you wondered what the recordkeeping requirements are for eligibility documentation? These questions and more will be discussed in a question and answer session around DD eligibility. Bring your questions and join us!

10. ReBAR: Restructuring Budgets, Assessments & Rates

Bob Clabby

Santiam

Have you heard the talk about this major system change, and wondered what it is all about? Bob Clabby, the Project Director will provide an overview of the project, including timelines and activities related to the restructuring, and the nuances between individual budgets and setting rates. The SIS Assessment Tool will also be introduced.

11. Adult Proctor Care

Laurie Lindberg, Darlene Okeeffe

McKenzie

This session will focus on one of the newest residential services available for adults, Adult

Proctor Care. The session will focus on how this model works for the individual in service, the responsibilities for the agency providing the service and the responsibilities of the CDDP contracting for these services. The presenters will be available to answer questions about this new service model and the rules governing the service. They will provide an overview of training and technical assistance that will be available to providers interested in becoming a proctor agency.

12. Children’s Residential: Talking to Parents about 24-Hour Residential Care

Debbie Kraus Dorn

Willamette

This session is intended to provide information that parents need when contemplating the difficult decision of residential placement for their child. The discussion will include descriptions of the array of services that are offered through out the state for children. The pros and cons of moving a child into a residential setting other than the family home will be offered.

13. Personal Care 20 – When, Where, Why, How?

Diana Buell, Kerry Cornell, Toni Larson

Santiam

What is PC-20? During this hour, eligibility requirements will be reviewed, as will instructions as to how and when an application should be made. Program differences for children and adults will be discussed. A panel will be available to discuss the “nuts and bolts” of processing applications and expectations for beginning and ending PC-20 plans.

14. SERT: How the System Can Be Utilized for Quality Assurance Purposes

Dana Messman

McKenzie

An overview of how SERT can be used as a tool for measuring Quality Assurance will be provided. Take a look at the various reports that are available and data that can be extracted from the SERT system. Learn how these tools can be useful to CDDP's and Services Coordinators.

15. Cracker Barrel with ODDS Regional Coordinators

Kristine Duffy, Mariah Forrest, Julie Harrison, Mike Maley, Jessie Martin, Darlene Okeeffe, Ken Ralph, Claudia Zamora

Willamette

Take some time to sit and chat with regional coordinators. Hear what current issues are across the state. Bring your questions and enjoy this informal get together.

16. The Importance of Financial Reporting

Angel Bringelson, Kristine Duffy

Santiam

17. Tools for Person Centered Approaches

Teresa Kelley

McKenzie

Learn about tools and skills that you can add to your toolbox for capturing learning, problem solving and analyzing information. Help teams create better plans for people receiving supports as well as provide leadership to focus on problem solving.

18. Home Alone Status

Barb Southard

Willamette

Recent legislation regarding the option for people in residential services to spend part of

their time in service alone will be discussed. Variances for staying home alone can be requested. This session will discuss the process for obtaining such.

19. Overview of DD Funding/Contract Processes and Structure

Julie Harrison

Santiam

This session will provide a high level general overview of the State/County Intergovernmental Agreement process, and its components: Rbase /CPMS/TSAR & eXPRS. Find out when and how a Services Coordinator may interface with these systems. Terms will be defined, and general functions of each system will be shared.

20. Services Coordinators Role in Authorizing and Monitoring the ISP

Marilee Bell, Laurie Lindberg

Hawthorne Room

Services Coordinators wear many different hats. This session will explore the responsibilities when authorizing the ISP, and assuring that certain expectations of the ISP are met.

21. Behavior Consultation: Scope and Purpose

Tracy Anderson, Zac Carr, Toni Larson

When is it appropriate to seek out a Behavior Consultant? What can they do? Who should be used to provide behavior consultation? What is the best way to match an individual's need to the skills and abilities of the consultant? How do we write a plan that includes measurable outcomes? How should the plan be monitored? When is it time to end a behavior plan? Come explore these questions and strategies for answering each.

Wednesday, March 7, 2007

8:15 – 8:45 Welcome **Cascade Hall**

A Look at our Changing Service Delivery System **James Toews**

1. RN Delegation

Gretchen Koch Thompson

Santiam

This session will discuss the process of registered nurse delegation across SPD's community based care settings. Following completion of the session, participants will: identify where RN delegation can occur; identify six factors an RN considers when making the decision to delegate or not; and, provide examples of what type of documentation to expect from a registered nurse when a task of nursing care has been delegated. Address will also cover the role of the SPD Contract RN in selected CBC settings.

2. People with DD and the Legal Systems they Encounter

Mary Claire Buckley; Lee Savage

McKenzie

This session will include an overview of who gets placed under Psychiatric Security Review Board (PSRB) and Department of Corrections (DOC) and why; how the two systems operate; and what kinds of placement planning issues and documentation requirements exist. We will also discuss how to establish working relationships with local law enforcement, the jails and Probation and Parole for kids and adults.

3. Complaints/Grievances and the Hearings Processes

Marilee Bell, Janet Straw

Willamette

Have you wondered what the differences are when comparing a Medicaid Fair Hearing to an Administrative Review to an Eligibility Grievance Review? Are you interested in better understanding your responsibilities to advise people in service of their hearing rights? This session will provide an overview of the different processes and describe our responsibilities to the individuals we serve, and to Centers for Medicaid and Medicare.

4. Strategies for Successful Facilitation

Teresa Kelley

Santiam

Learn about tools and techniques that are useful in facilitating meetings. Walk away with better understanding and resources to utilize.

5. People with DD and the Legal Systems they Encounter

Mary Claire Buckley; Lee Savage

McKenzie

Part two of continuing session

6. Turning 18: What Families and Young Adults Need to Know

Tracy Anderson, Darlene Okeeffe

Willamette

Come discuss the important topics that Services Coordinators and Personal Agents will want to share with families, and their young adults who are turning 18. Topics covered will include: applying for SSI; Representative Payee; Guardianship; Selective Service; Changes to medical providers; school rights and more. Materials will be provided.

7. **IDEA/High School Transition and Individual Education Plans**
Santiam
8. **Can we Really Change the World? A Briefing on the Work of the AG's Sexual Assault Task Force's DD Initiative**
Brie Atkins, Eva Kutas
McKenzie
In order to truly protect individuals, activities need to move beyond education and response, and begin to examine the underlying conditions that allow violence to occur in the first place. The Attorney General's Sexual Assault Task Force has been a leader in Oregon, working to promote more proactive strategies to address sexual violence, particularly against individuals with developmental disabilities. This presentation will provide an overview of the activities, findings and recommendations resulting from the work of the Task Force, with examples from the DD Initiative.
9. **Successful Referral Processes for People Entering Brokerages**
Kathleen Bond, Jill Ferns, Mary Foster, Martin Hager, Deborah Johnson, Mike Parr, Tom Racioppo
Willamette
This panel discussion will cover the topic of referrals from CDDPs to Brokerages. Strategies for a smooth referral process will be described and best practices regarding referrals, transfers and transitions will be shared.
10. **Understanding Guardianship**
Elaine Friesan Strang
This session will give an overview of guardianship: the process, rights, responsibilities, court expectations and issues to consider whether guardianship is the appropriate service for an individual.
11. **Family Dynamics and Self Direction: Customers Moving to Independence**
Ann Blackburn, Cindy Helvington
McKenzie
This session is designed to raise awareness about what you can do to help support someone with a disability to be more independent, especially when other people in their lives (such as family and friends) might not support what the person desires and needs. We will share personal examples of ways our support teams have helped us reach our goals of being more independent, and stories where we have not felt supported. We will challenge you to listen to the person at the heart of the matter: the person with a disability. They know what is best for them, and we all should respect the voice of self-advocates.
12. **Working with Mental Health for People with Co-Occurring Diagnoses**
Cheryl Applegate, Gary Cornelius, Rick Hammel, Al Levine
This session will involve a panel discussion with representation from both Mental Health and Developmental Disabilities Services. The focus will be on identifying existing barriers and ways to work through some of the barriers.
13. **Implementing Illness Management into Community Support**
Deborah Cateora; Helen Emmons
TBA
14. **Trust Building and Reciprocity**
Roberta Dunn, Angela Jarvis Holland
McKenzie
These two mothers of children with developmental disabilities will discuss what helps and hurts the flow between parents and professionals from a parent's perspective.

15. Medicaid Fraud

Rodney Hopkinson, Sheen Wu
Willamette

This training will focus on the reporting, investigation and prosecution of fraud and abuse, and how to refer cases related to persons with developmental disability, throughout the state. Some cases will be presented and discussed, with an eye towards demonstrating what can be done when you suspect fraud or abuse of a client with a developmental disability.

16. Relationship Building Between Providers, Services Coordinators and Personal Agents Santiam

17. Understanding OHP 101: For Services Coordinators and Personal Agents

Tony Larson, Donna Weaver
McKenzie

How does OHP work? What is the difference between fee for service and managed care? What does OHP pay for? How do Durable Medical Equipment (DME) requests work their way through the system? This session will guide you on how and where to start, and tips for trouble shooting your way through requests.

18. Crisis (part one- "The Basics")

Chris Danish, Kristine Duffy, Claire Weiss, Treven Whitney
Willamette

Learn about current program policy and funding guidelines for crisis and other programs managed by Regions. What is a crisis? Who is eligible? Who is eligible for "Turning 18" and "Turning 21" funds? We'll also talk about Support Services Customers in crisis and using crisis funds for individuals leaving Nursing

Homes. A panel of Regional staff will help address questions.

19. Emergency Preparedness Planning – Keeping People Safe

Ken Ralph, Connie Saldana
Santiam

"Earthquake, Tsunami, Flooding...Oh My!" Join in the discussion about how Service Coordinators and Personal Agents can help individuals; families and facilities plan for emergencies. Topics to be reviewed include: personal care networks, special needs and supports planning; identification of local resources; county emergency plans; local registries and interagency communication. The presenters will also give an update on the work of the SPD Emergency Preparedness stakeholders committee.

20. Criminal History Checks: Commonly Asked Questions McKenzie

21. Crisis (part two – "The Nitty Gritty")

Chris Danish, Kristine Duffy, Claire Weiss, Treven Whitney
Willamette

Follow the crisis process for individuals not in service, those in support services and those in Comprehensive services. Walk through how each Region operates a little differently. We'll take a look at the mandated caseload intake form, budget formats and tools from the field. A panel of Regional staff will help address questions.

Thursday, March 8, 2007

8:15 – 8:45 Welcome **Cascade Hall**

The Changing Face of our Infrastructure: The Challenges and Anticipated Benefits

Cathy Cooper

- 1. Application of Technology & Implementing Services**
TBA
Santiam
TBD
- 2. Tools for Person Centered Approaches**
Teresa Kelley
McKenzie
Learn about tools and skills that you can add to your toolbox for capturing learning, problem solving and analyzing information. Help teams create better plans for people receiving supports as well as provide leadership to focus on problem solving.
- 3. Working Together to Solve the Sticky Challenges in Brokerage/County Relationships: Some Suggested Best Practice**
Eva Kutas
In this interactive and helpful session we will work together to answer questions like: How can a protective services investigator build healthier family relationships? What should be done about harmful behaviors that don't meet the abuse definition? What are the low or no cost resources that can help keep people safe? What should we do if the individual keeps going back to their abusive boyfriend? We will begin with a brief overview of brokerage/county PSI basics- like what should be investigated and why and statewide data for 2005 – 2006. Bring your successes and challenges!
- 4. Problem Solving and Resolution Skills for Facilitators**
Teresa Kelley
Santiam
Have you wondered how to deal with those particularly tough situations during a meeting when opposing ideas are presented and no one can come to a conclusion? This session will share facilitation strategies that can help move a discussion forward to an agreeable conclusion.
- 5. Prepare to Care: Supporting Aging Care Givers**
Judy Bowen
Willamette
While you might not be thinking about it now, putting together a care giving plan with loved ones and other family members helps eliminate problems at home and work. A care giving plan can help reduce a family's financial strain. Without such, those family members most affected by the crisis – the care recipients themselves- end up with the least say in their wishes and priorities for the future. Imagine not having control over your own future! Too often that is what happens when families don't ask the important questions ahead of time. Learn about a new Planning Guide for Families called "Prepare to Care."
- 6. Good to Great Concepts**
Teresa Kelley
Santiam

7. What Can a Behavior Consultant Provide?

Mary Ann Seaton

Mckenzie

This session will explore the factors that contribute to effective behavior consultation in the home. Participants will learn how to think about behavior support planning for the family and /or the individual, what families should think about when hiring a behavior consultant and what they should expect to receive.

8. Helping to Navigate the DSO & SSI Systems

Carol Mauser

Willamette

TBD

9. The Goal Loop

Diana Buell, Mike Maley, Mike Parr, Tom Racioppo, Janet Straw

Cascade Hall

The "Goal Loop" moves from an Assessment, to the Individual Support Plan, to Outcomes and finally to Quality Assurance. In this session participants will explore ways to assess customer needs and wants, learn how to craft a measurable goal, determine what should be included in outcome based reports from providers and ultimately how all of this relates back to the individual customers goals.

10. Cracker-Barrel for Personal Agents

Diana Buell, Mike Maley, Mike Parr, Tom Racioppo, Janet Straw

Cascade Hall

Enjoy an opportunity to share ideas with, and learn from, Personal Agents from around the state.