

SPD Operations Committee Meeting
Thursday, November 8, 2012
1:00 – 4:00 pm

Attendees:

Brenda Lattion	Karen Gulliver (Teleconferenced)
Carol Mauser (Teleconferenced)	Kurt Kessler (Teleconferenced)
Charlene Gibb	Marci Howard
Gene Sundet	Terry Ford
Jenny Sneddon (Teleconferenced)	Vicki Horn

Guests/Presenters:

Lauren Mitchell
 Caryn Whatley
 Nathan Singer
 Jane-ellen Weidanz

Scribe:

Janet Morse

Absent:

Angela Munkers, Joe Easton, Karen Kahl, Jeanette Wilson, Dale Marande, Kurt Kessler.

Announcements:

No announcements at this time.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Central Office setting up cases for Admin Exam (Carol Mauser) <i>Referral# OPS 139</i>			

When Central Office DD sets up a case for Admin Exam they are going in and setting up the case in the APD office that would be attached to the client. A recent case caused extra work trying to track down why a second case had been created when there was a case that had been opened at 5530 and was just transferred to the local APD office. This created extra work in trying to track down why someone had opened a second case, in this case an ADMIN case, which was what our local workers next step as well. It was suggested to place these cases in one of the Central Office branch UCMS codings, not field branches to eliminate any confusion. The committee agreed Jeff Stell needs to attend the next meeting for further discussion.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Exception Requests (Jane-ellen Weidanz) Referral# OPS 140			

There has been a concern that exceptional requests are taking a lot of time for field staff and workers in Central Office to complete. Staff spend more time helping providers navigate the exceptions process, and less time doing redeterminations in a timely manner, making monitoring calls, or completing other tasks that are required under the waiver. Case managers are being pulled away from their primary functions by processes that the agency has introduced. The Medicaid Policy Unit is beginning to develop standard rate **bands** for exceptions including ventilators, two person transfers, and night needs. It was suggested training providers about the exceptions process (expectations, procedures, etc.) as part of their licensure. It is still a case manager's responsibility because of the direct knowledge of the specific case and provider. There is a concern that doing global training it presents the opportunity for the providers do not talk to the local case managers. They do a proforma type of process. It teaches the provider they can *expect* an exception instead of it *being* an exception. There is a strong component of the local case manager making sure the plan makes sense and then management signing off of it at the local level. The following recommendations were made:

1. A workgroup be created to review a lean process.
2. Have some of the responsibility or authority be returned to the local offices based on standard expectations.
3. Create a packet with what the providers need to do to facilitate the case managers being able to develop an appropriate plan.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Overlapping benefits for OHP & Medicare Savings Program Referral# OPS 141			

This referral is a larger impact and will be moved to the APD/CI group.

TOPIC:	Action/Task Decision Log:	Responsible	Due Date:
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		Person(s):	
UCMS requiring a reservation number to open an OHP Standard case <i>Referral# OPS 142</i>			

This referral is a larger impact and will be moved to the APD/CI group.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Contacting potential PMDDT clients when a referral is made (Nathan Singer, Karen Gulliver, Roberta Lilly) <i>Referral# 143</i>			

The DHS/OHA transfers work group determined APD/AAA branches use a variety of methods to contact potential PMDDT clients when a referral is made. Additionally, branches report continuing problems with lost hearings due to inadequate notices and/or communications to referred clients. The Transfers Work Group requested the APD Hearings group create a standardized communication for referred client that will cover what is needed and meet the requirements to prevent lost hearings. The draft letter has been accepted by the work group. The draft letter will be reviewed by the committee members and send any changes to Karen no later than Friday, November 30th.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Open ADM case and OHP 5503 or medical case (Nathan Singer, Karen Gulliver, Roberta Lilly) <i>Referral# 144</i>	The committee agreed the open cases stay at the branch they originated until the APD/AAA office decides it needs to be transferred.		

When APD/AAA has an open ADM case and OHP 5503 or an SSP office opens a medical case, usually the OHP coding prevents the ADM from being paid. Therefore, the two medical codes need to be on the same case. There is no procedure for this situation and strong disagreement as to who the case “owner” should be. It was recommended the open cases stay at the branch they originated until the APD/AAA office decides it needs to be transferred. The committee agreed this recommendation should be presented to the group working on this issue.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Proposed revisions to 437 form (Karen Gulliver) Referral# 145			

The committee reviewed the 437 form and discussed the proposed revisions. There needs to be more time to get more feedback from other stakeholders and provide responses. The committee agreed responses should be sent to Caryn Whatley no later than Friday, November 30th. It was recommended to wait until the next meeting to discuss this referral so Angela can participate in the discussion.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
High conflict positions /CW cross training Referral# 146			

This referral is a larger impact and will be moved to the APD/CI group.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:

Exempting APP from enrollment Referral# 147			
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This referral is a larger impact and will be moved to the APD/CI group.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
539H/ORACCESS (Karen Gulliver) Referral# 148			

The “other” section of the 539H form does not expand in the PDF/ORACCESS web version and has insufficient space to specify what verification or information is needed. Workers are having to use 210, create an addendum or write in what is needed by hand outside the given field. This form is with Publications for final review which must be distributed by Friday, November 16th. The “other” fields will be expandable to accommodate 1000 characters.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Purchasing items for Transition/Diversion (Nathan Singer, Karen Gulliver, Roberta Lilly) Referral# 149			

In order to purchase items for Transition/Diversion, Code 49 Workers have to a) go to the vendor and price the items, b) return to the office and get the 437, and c) return it to the vendor, pay the vendor and then pick up the items. Occasionally prices change in the interim or the item is sold. This process is inefficient and results in multiple trips. It was suggested using a SPOTS VISA card to allow for purchasing through Special Needs. This is currently being explored with Modernization. There are limitations to using this method. There is not a way to tie it to the state’s administration for individuals. When a 437 is processed, state’s administration pulls the funds. They actually get to see that the department spent funds on the clients and count it towards their estates. If a SPOTS VISA card is used, coding can be put on it so it will

at least match the Index/PCA/AOBJ but does not go back to the client. It would be necessary to track each expenditure per client. Once they are deceased it can be reported separately. The county is doing a pilot where a monthly log is submitted. Instead the client uploads a file and goes set in a separate file that could then be pulled for state's administration. There is a pilot system where Self Sufficiency offices have check out cards.

TOPIC:	Action/Task Decision Log:	Responsible Person(s):	Due Date:
Expectation for submitting annual review of Exceptions to Central Office (Jane-ellen Weidanz) <i>Referral# 150</i>			

The Medicaid Policy Unit submitted a referral about removing the expectation of the local office submitting annual reviews of community based care and in-home Exceptions to Central office if the hours/needs of the client have not changed. They recommended giving it a Level 2 authority in the local offices. Also, no longer allowing "save the date" for exception requests. Both of these suggestions will reduce duplicative work by staff at the local office and Central office. The committee agreed to recommendations.

MISCELLANEOUS ITEMS:

1. APD/CI group – This group consists of Terry, Carol, Marci, Karen, and Angela. CI sheets have not been reviewed because none have been submitted yet. The group is in the process of determining how to prioritize the CI sheets. Local offices will begin to review sheets and then submit them to the group. Terry will report back to the committee at the December meeting on their progress.
2. The committee came to a consensus that the OPS committee minutes, agenda, parking lot and referral tracking log be added to the APD Staff Tools webpage. Also, creating a mailbox that staff can send their comments to re: the referrals. **Referral form change:** 1) Add "Person submitting" and "Manager". 2) Add 'outcome' to the form.