



Access and Choice Design Team Meeting Summary

Access and Choice Design Team	Date of Meeting: August 29, 2011
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<p>Present: Al Coley; Joe Gerardi; John Gleason; Gerald Huber; Lauren Lange; John Maltby; Maryellen Moeser; Chris Muller; Chris Nemeth; Shelly Okure; Wendy Orzel; Bradley Pivar; Barbara Wale</p> <p>Absent: Shameka Andrews; Peter Smergut</p>
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Discussion Topics	Summary of Main Discussion Points, Considerations, Recommendations, Next Steps, etc.
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<p>Welcome and Background:</p>	<ul style="list-style-type: none"> ▪ Meeting Objectives: (1) To receive an update on the 8/24 Steering Committee meeting (2) To discuss public forum comments to assess whether they are addressed in the final report (3) To review and approve final design team recommendations as outlined in the draft report and attached materials. • Due to Hurricane Irene cleanup and focus, it was decided that this meeting will be shorter than originally intended and will go until 1 PM instead of 3 PM. ▪ Approval of August 16th meeting summary: The August 16th summary was approved with the following clarifications: The section describing assessment tools should clarify that there are direct and indirect costs associated with implementation of assessment tools. While the Supports Intensity Scale (SIS) may carry upfront costs, all assessment tools will carry costs even if they are indirect—all of the costs should be considered and factored in, not just the up-front costs. For example, the Adult and Child Needs and Strengths (CANS) is a public domain tool that doesn't need to be purchased, but there will be costs associated with configuring the tool (as well as validity testing etc.) to fit the unique characteristics of the New York State
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	developmental disability system.
<p>Discussion of Access and Choice DT Presentation to the Steering Committee and Feedback.</p>	<p>Jerry Huber gave a review of his presentation to the Steering Committee. The presentation focused around the three key areas that align with the Access and Choice Design Team Charter (see PowerPoint).</p> <p>1. No Wrong Door</p> <ul style="list-style-type: none"> • It has been recommended that the People First Waiver require the development of a state-wide cross-systems infrastructure with a universal assessment tool. Using a No Wrong Door approach, the waiver will ensure that individuals understand available options, make informed choices and gain supports/services that best meet their needs no matter where they begin the process. • A funnel approach that begins with a broad-based assessment tool and evolves into an individualized person centered plan will allow the developmental disability system to better respond to the wants and needs of individuals and families. • Recommendations for interim OPWDD measures include a two-way web based portal with care management and care coordination linkages and comprehensive information technology development/platform. These developments will better equip the DD system to perform an “early touch.” <p>2. Valid and Equitable Needs Assessment</p> <ul style="list-style-type: none"> • It has been recommended that the instrument be person-centered and strength based. The assessment tool must also allow for flexibility and predictability (no ‘automatic pilot’) and result in a holistic and comprehensive person-centered plan. • From a systems perspective, it has been





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recommended that the tool include mechanisms to ensure clarity of purpose and transparency. The tool must also be independent and unbiased. To further ensure the success of the assessment tool, it has been recommended that a protocol for neutral dispute resolution be established. In addition, guidelines must be established for the reassessment process that is in line with a No Wrong Door approach. Mechanisms for quality review and oversight must also be established.

- The Assessment Tools Technical Subgroup concluded that there is no perfect assessment instrument. Each state reviewed by the subgroup appeared to be struggling with performing valid and equitable needs assessment. It has been recommended that a consultant conduct an analysis of different tools used by various states operating under managed care environments. It was also recommended that pilots of different tools be conducted during the first year of waiver implementation.
- Ultimately, any tool used requires reliability and validity. The Steering Committee agreed that pilots should be conducted to study the effectiveness of key assessment tools in New York State so long as the individuals included in the sample population represent an array of behavioral/medical conditions. It was noted that regardless of the assessment tool(s) selected, the DDP will not be eliminated on April 1 (the anticipated start date of the People First Waiver).
- The Steering Committee also had some discussion about a firewall between an initial assessment function and the provider/DISCO and that the care coordinator(s) needed to





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	<p>have a role in ongoing assessment in order to best meet the needs of the person.</p> <p>3. Essentials for Choice in a Care Management Environment.</p> <ul style="list-style-type: none"> • Every individual has the right to a real and viable comprehensive person-centered plan. Stemming from this belief, it has been recommended that a formal vehicle for person centered planning be established that includes incentives to better equip providers and care management entities to uphold individual’s rights. Informed choice should be a quality indicator/outcome. Furthermore, care management contracts should include independent advocacy, a full array self-directed service options, flexible funding for individuals to enhance and facilitate choice. The contracts should also ensure that provider networks are diverse. In addition, individuals should have the ability to go outside of their care network for choice of providers and self-hires.
<p>Public Forum Responses</p>	<p>A review of the public forum responses relating to access and funding revealed a broad consensus with the Access and Choice Design Team recommendations. Examples include a recommendation for an easy to navigate online portal and universal application and assessment tools</p> <p>Additional Resources</p> <ul style="list-style-type: none"> • See “Public Forum Responses Access and Funding Worksheet”). • The url for the “Public Forum Stakeholder Analysis” is as follows: http://www.opwdd.ny.gov/2011_waiver/images/comment_analysis.pdf).
<p>Next Steps</p>	<ul style="list-style-type: none"> • Team members were asked to review the Draft Final Report of the Design Team recommendations and to respond to Maryellen with any recommended changes by Friday, September 2nd. If it is found that there are any disagreements between design team





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members on the content of the report, Maryellen will schedule a follow-up conference call to attempt to come to a consensus.

- **5.07 Plan:** The 5.07 plan will be focused entirely on the People First Waiver design. The plan will incorporate public input, briefing book analysis and design team recommendations shaped by the Steering Committee discussion. Unlike most years, we intend to hold public hearings following plan publication. This has occurred in the past, and will mean that the plan is reissued to reflect public input. The final 5.07 plan will be the final report of the design teams to the Steering Committee

