



Ohio's Employment First Funding Redesign Work Group
Monday October 20, 2014
Time: 9:00a to 4:00p

Facilitators: Allan I. Bergman and Lisa Mills, PhD

Attendance: John Pekar (Fairfield/Vinton DD), Greg Dormer (OOD), Kristen Helling (DODD), Carmen Shelton (Advocate), Debbie Hoffine (DODD), Lori Horvath (DODD), Dan Ottke (Clermont DD/OAAS), Vic Gable (Wood DD/APSE), Clay Weidner (DODD), Mary Vail (Goodwill Columbus), Steve Koons (Goodwill Cincinnati), Dave Reichert (Cuyahoga DD), Rick Black (Butler DD), Laura Zureich (Champaign/Shelby DD), Stacy Collins (DODD), Chris Filler (OCALI), Jason Umstot (OPRA), Pete Moore (OACB), Joe Kowalski (DODD)

Not present: Greg Swart (DODD)

❖ **Feedback on 10-6-14 Meeting Minutes and Principles Update (Allan)**

➤ ***Principles Feedback***

- Provider Competency principle should be revised to reflect person-centered best practice implementation of individual supported employment including the appropriate use of assistive technology.
- Group agreed to revise Presumption of Employability for All principle- to include the phrase "with a combination of paid and natural supports," after wrap-around activities.
- Group agreed to remove "prevailing" from the first bullet under Continuous Improvement Principle.

➤ ***Meeting Minutes***

- Lisa confirmed that Delaware 1915i is for ages 14-25.
- Links to the CMS bulletins be added to the 10-6-14 minutes.
- It was asked that we continue to have discussion on whether or not providers will be willing to serve individuals with more complex needs if we go to a milestone reimbursement system. Allan and Lisa acknowledged that this issue will be addressed when we discuss rate setting methodologies.

❖ **Review of Draft Supported Employment Service Array (Allan and Lisa)**

- Review Preliminary Draft of Integrated Employment Service Array generated from the 10-5-14 meeting
- Discussion
 - Should career planning be a discrete service or embedded within other prevocational services?
 - What items are included in career planning?
 - Is career planning time limited?

- Difference between transition piece from school to work and transition between sheltered employment to community employment. Career planning could be life-long. How do we differentiate between career planning and career advancement?
- Mary from Goodwill Columbus will provide a summary of Life Works
- Steve from Goodwill Cincinnati reported on a Career Exploration service with OOD. He will provide more information.
- The concern was raised that many members used the CMS bulletin to align and it was noticed that the terms we used on 10-6-14 do not match terms in the CMS bulletin.
- The system should allow for easy and timely access to needed services and not be formally sequenced. What guidance do we provide to SSAs about appropriate services for each place on the path to employment? DODD is drafting a guidance tool.
- The target is to have a menu that can be personalized
- We can start with CMS core definitions but as a state we can modify those definitions.
- We also need to be clear about service definitions and what services are available under each large service definition for the purpose of billing codes and audits.
- Members were reminded that we need to be careful not to overthink and over process. We should start with person-centered planning.
- This is a huge shift to person-centered planning and individual outcome. Training, on-going support, and coaching for SSAs is critical.
- Day array is often difficult to navigate. Discussion around developing an employment navigator service to be provided by an employment specialist who understands supported employment process (including customized employment and self-employment), including how to access time-limited and long-term supports and has expertise in multiple systems: VR, transition, etc.
- Several members (Goodwill Cincinnati, Clermont DD and Wood DD) shared similar roles currently in practice and will share job descriptions with the group; stated that the typical navigator caseload is 40-45 people. Wood DD's job description is attached.
- Discussion around appropriate roles and responsibilities for services and braiding of funding between VR and Medicaid. Clarification provided that OOD "job readiness checklist" is not used as an eligibility tool for VR services; rather it is used to determine areas that may potentially need to be accommodated to ensure individual success.
- DODD is raising expectations for the outcomes of Pre-Voc.
- Discussion of the possibility of using up to 5 modifiers in billing codes.
- Frustration over inability to build capacity for Community Partner Work Incentive Counselors (CWICs) for benefits counseling and inability to access the Social Security-endorsed VCU training because it is always filled.
- Discussion around the need for more consistent terminology between VR and DD systems to ensure mutual understanding.

❖ **Review CMS Federal Regulations, Guidance and Expectations for Vocational Habilitation and Adult Day Supports.**

- Day Habilitation- New Core Definition.

- Prevocational Services
 - Discussion around volunteering as a community-based prevocational service provided expectations are clear that it is time-limited and not an outcome; Volunteering does not constitute work and must occur in a 501 (c) 3 organization in which individuals without disabilities are engaged in volunteering.

❖ **Overview of Innovative Service Titles and Definitions from Other States.**

- WA: Community Access
- WI: Prevocational Services
- OK: Prevocational Services
- DC: Employment Readiness
- OR: Employment Path Services
- **Discussion:** The group had a discussion regarding the importance of workplace dress. This led to a review of the importance and complexity of this service. Laura Z. provided a review of what is done in Champaign DD. **(Laura will share the outline of how this is implemented.)**
- CFR440- Federal regulations- Lisa will provide. Recommendation to not use federal language but to rework as seen in OR.

❖ **Discussion: Role of Vocational Habilitation and Day Services in System Prioritizing Integrated/Supported Employment**

- Service options should be individualized, not based on a predetermined continuum.
- Individually appropriate and relative assessments (such as Discovery, situational assessments, etc.) are used to determine necessary services and supports
- Outcomes need to be tied to services
- Community-based work experiences must be “authentic.”
- Discussion around county board’s role in monitoring of service delivery
- Need to raise expectations
- Still questions/concerns about seeing employment for some individuals with complex needs
- What about the rest of the day?
- The belief that Employment First is a subset of Community First. Community First is the larger perspective and Employment is a part of that
- We need to be clearer that both Community First and Employment First are the goals for the State of Ohio
- We need to discuss how and where these services are provided. Where it occurs is just as important?
- What is it and where does it happen?

❖ **Small Groups: Designing New Service Definition for Vocational Habilitation:**

1. *What activities and supports should this service definition cover?*

- Backward planning Identification of place on the path to employment
- Support for paid internships (Can OOD fund wages/stipends?)
- Billable vs. unbillable (employer development and culture)
- Employment Navigator
- Braided funding

- Define employment goals/job matching
- Transportation should be separate (being flexible and creative).
- Volunteering
- Internships
- Assessment/discovery
- Vocational profile development
- Asset development
- Mentorship/peer support
- Soft skill learning opportunities- need to be community-based
- Self-employment exploration
- Career exploration
- Assistive technology assessment
- Transportation training
- Recognize career goals can and do change
- Determine skills, outline employment goals, and make employer match
- Question- How will this fit with the CMS setting rule and DODD's 5 year transition plan
- Realistic environmental assessment in community
- Peer mentorship
- Paid "natural" supports

2. *What activities and supports (that are currently provided under this service definition) should not be covered going forward?*

- Consider renaming service to reflect community-based path to employment and on-going supports required
- b i- viii- realign the definitions to support an authentic community-based experience and assessment with the ongoing supports required
- Are all "facilities" presumed to not meet compliance with HCBS settings rule? For example, if the "facility" also provides workforce development services, etc. to individuals with and without disabilities, such as computer access and computer classes?
- Non-integrated services
- **Discussion-** braided funding needs to be discussed; teams need to be encouraged to use one-stop centers.
- Soft skills training
- Transportation

3. *What should be the expected outcome(s) of this service?*

- Integrated competitive employment
- Enclaves
- Outcome of prevocational services should align with expectations from OOD (vocational profile/career plan, etc.)

4. *What service limitations for this service would advance Employment First Goals?*

- Time-limited
- Clear expectations for outcomes of services to be achieved with a reasonable time period
- Need to ensure that integrated prevocational services, like career exploration, do not serve as a disincentive to income generated from sheltered work.

- Shall not take place in a specialized facility; should take place in the community

❖ **Small Groups: Designing New Service Definition for Adult Day Supports Worksheet:**

1. What activities and supports should this service definition cover?

- Assessment towards community integration, interests, desires, and preferences.
- Social skill development
- Mobility and safety training
- Volunteering
- Money management/budgeting
- Benefits/asset management
- Self-determination/self-advocacy
- Support of those in retirement
- Building social capital/networking
- Mentorship
- Integrated day supports- can this be accomplished through HPC?
- Adult support does not have a place in service structure
- How is this included in the annual review on someone's path to employment?
- Leads into the discussion on an "exception"
- We need to be intentional about service provision and alignment and the language we use
- Should be tied to annual review of the employment path
- Retirement
- Career exploration
- Community access
- Introduction and discussions about work
- Problem solving
- Interest driven activities in the community. SSA's and service providers need to be focused on community options
- Community Navigator/Connector
- Social focus, social life
- Current staffing ratios create issues
- Should this be residentially focused?
- Need for staff training; intentionality.

2. What activities and supports (that are currently provided under this service definition) should not be covered going forward?

- Should it cover pre-voc?
- Rules-what should we be doing?
- ADS rule currently separates this service from vocational: "non-vocational services provided in a non-residential setting;" shouldn't this service support an individual to maintain employment by providing wrap-around supports?

3. What should be the expected outcome of this service?

- Maintained community employment
- Community Integration
- Community connections

- Community opportunities
- Natural supports (where possible)

4. *What service limitations for this service would advance Employment First goals?*

- Not offered in a segregated setting
- Rate limits to encourage employment
- Should focus on getting people into the community doing what they want to do
- Why would we limit?

❖ **Larger Discussion Points:**

- **The development of the framework between OOD and DODD is necessary when moving forward. There are multiple questions that need to be addressed:**
 - What would OOD want to see from people prior to the referral to OOD?
 - How do Medicaid-funded services arrive at the career goal and how are services outlined to identify a specific career goal?
 - Critical to ensure that Medicaid-funded prevocational services align with OOD's expectations so that services provided by each system are appropriately organized and understood with braided funding to support a person seamlessly on their path to employment.
- New model must be phased in gradually to allow for individuals and their families to adjust to changes and new expectations; also must provide continuous family education and training
- All agreed that the Employment Navigator is important.
- We need to minimize the overlap of definitions and ensure the rates support the work.
- Is Ohio fully maximizing all available federal dollars through Medicaid and VR? What is necessary to increase county participation in the Medicaid HCBS waiver given the possibility of Congress either capping or block granting Medicaid in the future?
- Need to develop a supported employment service definition (including customized employment and self-employment) and rate in the VR system that is compatible with the Medicaid-funded definition and rate to ensure fluidity and braided funding between the systems. Possibility of dual-certification process with consistent provider qualifications.
- Concerns regarding the roles and responsibilities of the individuals with DD and their families in this changing environment
- Concern over the perception of an "entitlement" to not work
- Potential conflicts with other rules, such as health and safety.
- Lisa will share example of Iowa's Informed Choice process (attached)

❖ **Follow Up/Next Session**

- A goal for next session will be to review the draft service definitions that Lisa and Allan will prepare from today's discussion and the array of services developed at the meeting on 10-6-2014.
- Review potential modifiers for employment services under the waiver (staff intensity, etc.)