

Attachment A: Final Work Plan

(NOTE: The Objectives/Interim Tasks are the required specific activities a state must address and thus are not allowed to be modified)

General NWD/SEP Structure

1. All individuals receive standardized information and experience the same eligibility determination and enrollment processes.

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
1.1. Develop standardized informational materials that NWD/SEPs provide to individuals	4/1/15	David Drezner with support from BIP Team	Not started	Informational materials <i>(with stakeholder input)</i>
1.2. Train all participating agencies/staff on eligibility determination and enrollment processes	6/1/15	Leahann Moslak	Not started	Training agenda and schedule

2. A single eligibility coordinator, "case management system," or otherwise coordinated process guides the individual through the entire functional and financial eligibility determination process. Functional and financial assessment data or results are accessible to NWD/SEP staff so that eligibility determination and access to services can occur in a timely fashion. *(The timing below corresponds to a system with an automated Level I screen, an automated Level II assessment and an automated case management system. NWD/SEP systems based on paper processes should require less time to put into place.)*

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
2.1. Design system (initial overview)	10/18/14 (with Work Plan)	Leahann Moslak	Completed	Description of the system
2.2. Design system (final detailed design)	3/1/15	Jonathan Heil	In Process	Detailed technical specifications of system
2.3. Select vendor (if automated)	N/A	N/A	N/A	N/A
2.4. Implement and test system	7/1/15	Jonathan Heil with support from BIP Team	Not started	Description of pilot roll-out
2.5. System goes live	9/1/15	Jonathan Heil	Not started	Memo indicating system is fully

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
				operational
2.6. System updates	Semiannual	Jonathan Heil	Not started	Description of successes and challenges

NWD/SEP

3. [State has a network of NWD/SEPs and an Operating Agency; the Medicaid Agency is the Oversight Agency.](#)

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
3.1. Identify the Operating Agency	4/1/14 (with application)	Charles Tyrrell	Complete	Name of Operating Agency: DHS
3.2. Identify the NWD/SEPs	4/1/14 (with application)	Charles Tyrrell	Complete	List of NWD/SEP entities and locations
3.3. Develop and implement a Memorandum of Understanding (MOU) across agencies	1/1/15	Leahann Moslak	Not started	Signed MOU

4. [NWD/SEPs have access points where individuals can inquire about community LTSS and receive comprehensive information, eligibility determinations, community LTSS program options counseling, and enrollment assistance.](#)

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
4.1. Identify service shed coverage of all NWD/SEPs	4/1/14 (with application)	Charles Tyrrell	Complete	Percentage of State population covered by NWD/SEPs
4.2. Ensure NWD/SEPs are accessible to older adults and individuals with disabilities	4/1/14 (with application)	Charles Tyrrell	Complete	Description of NWD/SEP features that promote accessibility

Website

5. [The NWD/SEP system includes an informative community LTSS website; Website lists 1-800 number for NWD/SEP system.](#)

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
5.1. Identify or develop URL	1/1/15	Shane Roadcap	In Progress	URL
5.2. Develop and incorporate content	4/1/15	Yvonne Murphy/Eric Harkreader with support from BIP Team	In Progress	Working URL with content completed
5.3. Incorporate the Level I screen into the website (<i>recommended, not required</i>)	7/1/15	Shane Roadcap	Not started	Working URL of Level I screen and instructions for completion

1-800 Number

6. [Single 1-800 number where individuals can receive information about community LTSS options in the State, request additional information, and schedule appointments at local NWD/SEPs for assessments.](#)

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
6.1. Contract 1-800 number service	1/1/15	David Drezner with support from the BIP Team	In Process	Phone number

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
6.2. Train staff on answering phones, providing information, and conducting the Level I screen	7/1/15	David Drezner with support from BIP Team	Not started	Training materials

Advertising

7. [State advertises the NWD/SEP system to help establish it as the “go to system” for community LTSS](#)

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
7.1. Develop advertising plan	2/1/15	Yvonne Murphy/Eric Harkreader with support from BIP Team	In Process	Advertising plan (<i>with stakeholder input</i>)
7.2. Implement advertising plan	6/1/15	Yvonne Murphy/Eric Harkreader	Not started	Materials associated with advertising plan (<i>developed with stakeholder assistance</i>)

CSA/CDS

8. A CSA, which supports the purposes of determining eligibility, identifying support needs, and informing service planning, is used across the State and across a given population. The assessment is completed in person, with the assistance of a qualified professional. The CSA must capture the CDS (a Core Data Set of required domains and topics).

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
8.1. Develop questions for the Level I screen <ul style="list-style-type: none"> The Information and Referral Tool will be self-administered 	3/1/15	Leahann Moslak	Not started	Level I screening questions (<i>developed with stakeholder input</i>)
8.2. Fill out CDS crosswalk (see Appendix H in the Manual) to determine if your State's current assessments include required domains and topics	10/18/14 (with Work Plan)	Leahann Moslak	Completed	Completed crosswalk(s)
8.3. Incorporate additional domains and topics if necessary (<i>stakeholder involvement is highly recommended</i>)	4/1/15	Program Offices with support from BIP Team	Not started	Additional domains and topics added to Assessments, if necessary
8.4. Train staff members at NWD/SEPs to coordinate the CSA	10/18/14 (With Work Plan)	BIP Team	Completed	Training materials, if necessary
8.5. Identify qualified personnel to conduct the CSA	10/18/14 (With Work Plan)	BIP Team	Completed	Description of the qualifications of those individuals identified as personnel who have the ability to conduct the CSA
8.6. Regular updates	Semiannual after 12 months	BIP Team	Not started	Description of success and challenges

Conflict-Free Case Management

9. States must establish conflict of interest standards for the Level I screen, the Level II assessment, and plan of care processes. An individual's plan of care must be created independently from the availability of funding to provide services.

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
9.1. Describe current case management system, including conflict-free policies and areas of potential conflict	4/1/14 (with Work Plan)	Charles Tyrrell	Update completed 11/24/14	Strengths and weaknesses of existing case management system
9.2. Establish protocol for removing conflict of interest, if applicable	1/1/15	Kellie Wayda/Julie Barley	In process	Protocol for conflict removal; if conflict cannot be removed entirely, explain why and describe mitigation strategies

Data Collection and Reporting

10. States must report service, outcome, and quality measure data to CMS in an accurate and timely manner.

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
10.1. Identify data collection protocol for <i>service data</i>	10/18/14 (with Work Plan)	Leahann Moslak	Completed	Measures, data collection instruments, and data collection protocol
10.2. Identify data collection protocol for <i>quality data</i>	10/18/14 (with Work Plan)	Leahann Moslak	Completed	Measures, data collection instruments, and data collection protocol
10.3. Identify data collection protocol for <i>outcome measures</i>	10/18/14 (with Work Plan)	Leahann Moslak	Completed	Measures, data collection instruments, and data collection protocol
10.4. Report updates to data collection protocol and instances of <i>service data</i> collection	Semiannual**	BIP Team	Not started	Document describing when data were collected during previous 6-month period, plus updates to

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
				protocol
10.5. Report updates to data collection protocol and instances of <i>quality data</i> collection	Semiannual**	BIP Team	Not started	Document describing when data were collected during previous 6-month period, plus updates to protocol
10.6. Report updates to data collection protocol and instances of <i>outcomes measures</i> collection	Semiannual**	BIP Team	Not started	Document describing when data were collected during previous 6-month period plus updates to protocol

** If States do not submit satisfactory information regarding data collection protocol, they will be required to submit this information on a quarterly basis.

Sustainability

11. States should identify funding sources that will allow them to build and maintain the required structural changes.

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
11.1. Identify funding sources to implement the structural changes	4/1/14 (with Work Plan)	Charles Tyrrell	Update completed 11/24/14	Description of funding sources
11.2. Develop sustainability plan	4/1/15	Ronni Burkhart	Not started	Funding sources and estimated annual budget necessary to maintain structural changes after award period ends

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
11.3. Describe the planned usage for the enhanced funding	10/18/14 (with Work Plan)	Ronni Burkhart	Completed	Description of how the State will use the enhanced funding earned through the program. Detail how these planned expenditures: 1. Increase offerings of or access to non-institutional long-term services and supports; 2. Are for the benefit of Medicaid recipients; and 3. Are not a prohibited use of Medicaid funding.

Exchange IT Coordination

12. [States must make an effort to coordinate their NWD/SEP system with the Health Information Exchange IT system.](#)

Major Objective / Interim Tasks	Suggested Due Date	Lead Person	Status of Task	Deliverables
12.1. Describe plans to coordinate the NWD/SEP system with the Health Information Exchange IT system	4/1/15	Charles Tyrrell	In process	Description of plan of coordination
12.2. Provide updates on coordination, including the technological infrastructure	Semiannual	Charles Tyrrell	Not started	Description of coordination efforts

