

Mentors for Self Determination

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PA TRAINING PARTNERSHIP FOR PEOPLE WITH DISABILITIES AND FAMILIES

“keeping individuals and families informed”

November 2007

Mentor Memo

Issue 6

We hope everyone had a wonderful summer and you are taking advantage of the beautiful autumn we are experiencing in Pennsylvania! In this issue of the Mentor Memo we will discuss several issues which concern people receiving Mental Retardation Services in Pennsylvania. You will receive information on the Supports Intensity Scale (SIS) and the PA Plus, the Waiting List Initiative, revised Waiver Service Definitions and much more...

The Office of Developmental Programs (ODP) announced Ascend Management Innovations LLC, doing business as **DDM Ascend** (Dual Diagnosis Management) has been selected to administer the Supports Intensity Scale (SIS©) and PA Plus for waiver participants in the state of PA.

The SIS and PA Plus is a standardized assessment that focuses on the level of support a person needs. ***ODP has added a small number of additional questions, known as the PA Plus, to be administered with the SIS© in order to gather additional information that will be used for planning.** The SIS is currently designed to assess the needs of people 16 and older who have mental retardation. The survey was developed by the American Association on Intellectual and Developmental Disabilities.

The SIS and the PA Plus complies with the Center for Medicare/Medicaid Services requirement for PA to have a statewide assessment. ***In March of 2005, the Centers for Medicare and Medicaid Services (CMS) outlined several significant issues that required the Office of Developmental Programs' (ODP) attention before CMS would renew Pennsylvania's Consolidated Medicaid Waiver. One primary issue was the assurance that necessary supports and services are consistently and appropriately delivered to waiver participants.**

The SIS is the beginning of the planning process for people who receive waiver services, supporting the Individual Support Plan (ISP). ***Please note that the SIS© and PA Plus assessment is not a budget instrument. It is a means used to help guide conversation and to help identify services and supports to meet needs in the individual planning process.*** Remember: The SIS and the PA Plus assessment **is not designed** to be an evaluation to create an individual budget. The complete SIS and the PA Plus, MR Bulletin ***(MR Bulletin 00-07-02)** is available on The Training Partnership's Web Site: www.thetrainingpartnership.org or plan to attend Mentor's next Get-Together to learn more about the SIS and the PA Plus.

A Mentor Get-Together will be held November 27th 9 AM to 4 PM at The Lantern Lodge, Myerstown, Lebanon County. **Families and self advocates statewide are welcome to attend.** The morning will begin with a time for families and self advocates to network, followed by a Family Connection discussing the SIS and the PA Plus. A discussion with Deputy Secretary, Kevin Casey, with time allowed for a question and answer discussion with attendees will follow the Family Connection. In the afternoon family and self advocate Partnership trainings will be offered. Registration is required. (Please refer to enclosed flyer for details.)

The Mentor Get-Together held September 11, 2007 in State College was an entertaining and informative day-long event for self-advocates and family members. Attendees had an opportunity to network with other family members and self-advocates during breakfast. Three Partnership

trainings were offered, Self-Determination Class 1 by and for self-advocates, along with two family trainings, What is a Waiver and How Do I Get One, and Understanding the MR System in PA: (ISP).

After lunch everyone played a game of Mentor Trivia. ***“How well do you know the MR System in PA?”***

We thought it would be fun to recognize individuals/family members for an outstanding accomplishment during the last several months. Much to their surprise two mothers received Mentor Awards. Betty and her daughter, Pam, were the recipients of the ***“To the Top”*** award. Betty filed a Fair Hearing Appeal when her daughter who is receiving the Consolidated Waiver was denied a group home placement of her choice. Betty won the Appeal. However, her county filed a Reconsideration of the Appeal with DPW. Betty and Pam’s case went to Estelle Richmond, Secretary of the Department of Public Welfare. Again, Betty won her case and is pleased to say that Pam is very happy in her new home with her new friends.

Alice received the ***“No Way”*** award for not allowing her son to permanently reside in a nursing home after a fall at his home. Alice would not accept what the system was offering her son. After several long months and countless meetings, Rick received the rehabilitation and therapy necessary for him to walk and be part of his community.

The ***“Power Team”*** award was presented to Ramona Klink and Esther Kuhn. Ramona and Esther were presented with the award for doing the most self-advocate trainings in the Central and Western Regions. Thanks, ladies, for doing a superb job and not being afraid to accept the challenge. Many of their friends are becoming trainers. This year their training obligations will not be quite so monumental.

Attendees were encouraged to write their concerns, issues and questions on sticky notes, which were placed on a board we called, ***“The Mentor Parking Lot”***. Jeff Petraco, Director of Bureau of Supports for People with Intellectual Disabilities, ODP and David Kaufman, ODP, gave people an update, answered questions and discussed issues from the ***parking lot*** with attendees. Everyone present appreciated the time Jeff and David spent explaining the Office of Developmental Programs’ policies and collecting further information regarding issues and concerns expressed during the discussion.

Mentors for Self Determination would like to recognize Patty McCool and Dana Olsen, Office of Developmental Programs, for providing you with the following information:

“The Waiting List Initiative: Making it Happen, Keeping it Going!”

Background: Many thanks to all of you who worked so hard to get funds for the individuals who are on the waiting list for services in Pennsylvania! Your visits to the people who make the budgets happen resulted in funding to support hundreds of individuals who have been waiting a long time! The Office of Developmental Programs (ODP) is committed to making sure that the funds are spent the way they were allocated and are provided to people who were identified to receive them.

Purpose: This article will explain to you how ODP develops the budget requests for the initiative funds, what the guidelines are for this year’s waiting list initiatives and the process ODP will follow to ensure the funds are spent for the individuals who were identified by the end of this fiscal year.

The Planning Process: The County MH/MR Program, also known as the Administrative Entity (AE), is required by the MH/MR Act of 1966 to develop an annual plan that addresses service needs for the individuals supported by its program. The Office of Developmental Programs (ODP) has created a two stage planning process to be followed by the AE that uses the information contained in the emergency category of the Prioritization of Urgency of Needs for Services (PUNS). The PUNS list is the waiting list in Pennsylvania.

In Stage 1 of the planning process, ODP provides to the AE the names and status of the individuals that are listed in their emergency category of PUNS on or about April 15 of each year. The AE then determines who they would be able to serve, what services are needed and an estimated cost to provide the services. The information is then submitted to ODP in June of each year. The data contained in Stage 1 is used to develop the planning figures for the Stage 2 plan for the following year. The Stage 1 plan that was submitted in June 2006 provided ODP with the information needed to develop the tentative initiative funding figures for Fiscal Year 2007-2008.

The AE received those tentative initiative funding figures, number of persons to be served and guidelines for use of the funds around March of 2007. The figures were considered to be tentative until the Governor's budget was passed and were used to develop the Stage 2 plan. In the Stage 2 plan, the AE identified, by name, the individuals they projected to serve according to the guidelines and the costs. The AE submitted the Stage 2 plan for Fiscal Year 2007 -2008 in July 2007.

The following table illustrates the planning process:

Stage 1		Stage 2	
April	June	March	July
ODP notifies AE of individuals with emergency PUNS	AE submits planning information to ODP	ODP provides planning figures to AE	AE provides ODP with names of individuals that will be served

These are the guidelines ODP issued to the Administrative Entities (AE) for the people who are expected to be served with this year's (FY 2007-08) initiative funds. These planning guidelines have been shared with provider associations and other statewide associations.

Initiatives

The Initiative for Youth and Young Adults Leaving School affects up to 800 persons who will be funded under the Person Family Directed Supports (P/FDS) waiver. Average annual statewide cost for people in this initiative is expected to be \$17,500, although this amount will vary depending each person's needs. Eligibility criteria for this group are that each person:

- meets all P/FDS waiver requirements
- has a PUNS, with priority given to those in emergency status
- graduated or left high school, with priority given to persons leaving in or after December 2006.

Each person in this initiative is expected to be employed or receiving either supported employment or a community inclusive non-residential service like volunteer work for a minimum of 5 hours a week/20 hours a month. Any service packages that do not meet this expectation will include a plan to provide these services in the future. For more information on this initiative, interested parties can contact the following Regional Employment Point persons or the AE Employment point person in their County.

Region	Employment Contact Person	Phone	E-Mail
Southeast (SE)	Diane Jones	215-560-2244	djones@state.pa.us
Northeast (NE)	Alex O'Brien	570-963-4392	jaobrien@state.pa.us
Central	John Witt	717-772-6498	jwitt@state.pa.us
Western	Dan Goclano	412-565-5042	dgoclano@state.pa.us

The Initiative for Every Day Living Options affects up to 759 persons in the Consolidated Waiver receiving habilitation in a private home, family or relative's home, or a lifesharing/family living home. Average annual statewide cost for people in this initiative is expected to be \$49,300, although this amount will vary depending on the person's needs. Eligibility criteria for this group are that each person:

- meets all Consolidated Waiver requirements,
- has a PUNS for residential services, with priority given to those in emergency status
- receives habilitation in one of the ‘Everyday Living’ arrangements noted above

The AE is also authorized to approve use of initiative funding to follow persons out of community homes to receive habilitation in one of the three Everyday Living options when funds left behind are used for a person on the emergency waiting list or who moves out of the P/FDS waiver. For more information on this Everyday Living Initiative, interested parties can contact the following Regional Point Persons or the AE Lifesharing point person in their County.

Region	Employment Contact Person	Phone	E-Mail
SE	Preston Ringo Cheryl Boyle	610-757-1348 215-560-1047	nringo@state.pa.us cboyle@state.pa.us
NE	Laurie Dutz	570-963-3212	jdutz@state.pa.us
Central	John Witt	717-772-6498	jwitt@state.pa.us
Western	Don Stahlman	412-565-7926	dstahlman@state.pa.us

ODP has secured the services of Toni Richardson as a consultant to assist ODP staff Dana Olsen and Patty McCool to make sure the waiting list initiative activities are completed by June 30, 2007.

Moving Forward: Spreadsheets have been developed to track, by individual, all the people identified to be served in the Stage 2 plans by each AE. On a monthly basis, the spreadsheets will track when the individual is removed from the emergency status of PUNS and when the funds from one of the initiative categories (P/FDS, P/FDS Graduate or Non-Group Home Consolidated Waiver) have been authorized for that individual. Results of that monthly tracking will be shared with all the AEs and various stakeholder groups so that we are all aware of the progress that is being made.

The AEs received a letter from Deputy Secretary Casey in September of this year outlining the process that will be used, and indicating that if the funds are not being used by an AE and there is a need in another AE for additional funds to serve more people in the initiative categories, those funds will be removed from one AE and allocated to another through the re-budget process. The intent is to completely serve, at least, all the individuals who were identified for this waiting list initiative. Hopefully, more individuals will be served than were identified through the planning process.

Toni Richardson identified thirteen AEs who have the majority of the individuals to be served through the initiative. Meetings are being held with those AEs to determine what assistance might be needed to make sure they are able to enroll and serve the individuals on their lists. Several barriers have already been identified and strategies are being developed to address them.

One of those barriers is enrollment. It is absolutely critical that when an individual is identified to be served through the waiting list initiative, the paperwork is completed immediately for enrollment into either the P/

FDS or Consolidated Waiver. Please encourage everyone you know who is identified to work closely with his or her supports coordinator to complete the enrollment process quickly!

Forums: Dana Olsen has worked with the Regional Office point persons for Lifesharing to set up forums in each of the four Regions to answer questions and encourage people to explore Lifesharing and other Everyday Living Options provided under this initiative and as an option when considering future placement. Registration must be made through Rebecca Roberts at 1-877-518-9597. The forums are scheduled as follows:

Region	Location	Date	Time
Southeast	King of Prussia	November 6	2:30 - 5:00
Northeast	Nanticoke	November 14	1:00 - 3:30
Central	Altoona	December 5	1:00 - 3:30
Western	Oil City	November 14	1:00 - 3:30
	Pittsburgh	December 12	1:00 - 3:30

Conclusion: We hope this article helps you to understand what we at ODP are doing to make all of your hard work and efforts become a reality for the individuals targeted to be served through the waiting list initiative this year. If you have any further questions, please feel free to email Patty McCool at pmccool@state.pa.us.

*“Thanks again for all of your support!”
Patty McCool and Dana Olsen*

Additional Important Information You Need to Know”

Find Out if You Are to Receive Funding for Services and Come Off the Waiting List. If you are on the Emergency Waiting list for services and do not know if you are going to receive funding, please call your Support Coordinator. According to the Office of Developmental Programs (ODP) Phase 2 of the re-budgeting process has been completed and the counties have submitted the names of all people who are to receive funding for community services and supports. If your county is unable to inform you, we have been informed by Kevin Casey, Deputy Secretary of ODP to call your Regional Office.

Have your services been reduced? If you are receiving waiver funding and your services have been reduced due to rate setting, please contact your regional office. The Office of Developmental Programs has informed us that they will review budgets on a case by case basis.

Get ready for the Supports Intensity Scale (SIS) and the PA Plus. Individual assessments are beginning in January 2008 using the Supports Intensity Scale and PA Plus for ALL new people who will be receiving the waiver. Approximately 750 new recipients will be the first to undergo this process.

Mentors have been asked, “***What is the status of the revised Waiver Service Definitions?***” Due to the overwhelming response from the last public-comment period, a revised bulletin is being drafted. A small workgroup, including self-advocates and family members is assisting the Office of Developmental Programs (ODP) with revisions to the draft bulletin. Once again, ODP will distribute the draft bulletin via Listserv’s and people will have the opportunity for public comment. ODP anticipates implementing the revised Waiver Service Definition Bulletin, **July 1, 2009**.

People are very anxious for the implementation of the ***Statewide Intermediary Service Organization Fiscal/Employer Agent ISO Model***. The Office of Developmental Programs’ long range prediction is the Statewide Fiscal/Employer Agent ISO Model will be in place by the **spring of 2008**. Under the Fiscal/Employer Agent ISO model, individuals/representatives will be able to [1] recruit and hire qualified support service worker(s); [2] determine his/her work schedule, [3] determine the tasks to be performed and how and when the tasks are to be performed; [4] orient and train their worker(s) [5] manage the day-to-day tasks performed by their worker(s) and [6] dismiss their worker(s) when appropriate.

The Fiscal/Employer Agent (ISO) will represent the business agent. The ISO will handle the payment of worker(s) salary, Social Security, workman's compensation and insurance deductions. When further information becomes available, you will be informed via Mentor's Listserv's and in a future Mentor Memo.

We are pleased to announce a new self-advocate training group **Self-Advocates United as 1 (SAU1)**. The new group consists of self-advocates from Mentors for Self Determination and self-advocate trainers from Speaking for Ourselves. SAU1 is responsible for conducting trainings for other self-advocates across PA.

Self-Advocates United as 1 is currently prepared to offer the following trainings: Understanding the Mental Retardation System in Pennsylvania: Background, Funding for Services and Supports, Getting into the System, and Waivers.

Other trainings include: Sexual Abuse Awareness, Life After High School: Planning for Transition to Adulthood, Introduction to Person-Centered Thinking, Self Determination, Self-Directed Services. Self Advocates United as 1 (SAU1) is currently working on the Supports Intensity Scale (SIS) and PA Plus training, which will be available soon.

If your self-advocate group would be interested in receiving training by self-advocates, contact Susan McCloskey at 724-813-5702.

Mentors are trying something different. "The MR System is difficult to understand. We are always searching for new ways to bring you information. We are introducing the **"Hot Topics Series"** a new way to look at tough subjects. People tell us that they walk away from Mentor trainings wishing they could have further discussion on the information provided." The **"Hot Topic Series"** consists of a Partnership training from 10 am to noon at Mentor's Harrisburg Office, 1414 N. Cameron Street. Following the training, families and self-advocates have the opportunity to attend a Family Connection from 12:30 pm to 2:30 pm. The Family Connection is an informal question and answer session regarding issues people are experiencing with the Mental Retardation System in PA. The next two **"Hot Topic Series" are: Individual Support Plan (ISP), November 14th and Prioritization of Urgency of Need for Services (PUNS), December 5th**. To register, call Debbie Leasure: 814.547.1577 or email: dleasure@mentors4sd.org by the Friday before the Hot Topic scheduled for the following Wednesday morning. **Registration is required.**

Partnership trainings continue to be scheduled throughout the Central Region and Family Connections statewide. M4SD trainings are posted on **The Training Partnership Calendar** at www.thetrainingpartnership.org and **Mentors Web Site** www.mentors4sd.org . If you wish to schedule a training in the Central Region, contact Debbie or Susan.

We are updating the Yahoo and Constant Contact Listserv's. The Listserv's act as an immediate resource to distribute up-to-date information regarding the current MR system that will have an effect on individuals and families. They also provide an opportunity for people to receive accurate information, reply to information posted on the internet for public comment, receive announcements for trainings and meetings, etc. If you subscribe and decide you do not want to receive further email information, the listserv's have an **"unsubscribe"** link to remove your name immediately. To be added to M4SD's Listserv's, email: dleasure@mentors4sd.org or telephone Debbie.

For any questions, concerns or issues you are experiencing with the MR system in Pennsylvania, contact Mentors for Self Determination:
Debbie Leasure: email: dleasure@mentors4sd.org or telephone 814.547.1577.
Susan McCloskey: email: wideopen@zoominternet.net or telephone 724.813.5702.