

Transition of HCS Case Management to MRA Service Coordination

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Purpose of Transition of HCS CM to MRA SC

SB 1, Section 48 (81st Session)

- ▶ Provides \$207 million General Revenue for home and community based programs for people with intellectual and developmental disabilities and for reshaping the system of services
- ▶ 7,832 people on state-wide waiting lists will receive waiver related community services by August 2011.
- ▶ Additionally, HCS services will be provided to people leaving large and medium ICF/MRs, children aging out of foster care, and children and adults at risk for institutionalization.
- ▶ The funding for increased community services is contingent, in part, on the transfer of case management from the HCS Provider to the MRA.

MRA Service Coordination for HCS Transition Summary

Primary MRA goals prior to June 1, 2010 implementation:

- ▶ Clear delineation and common understanding of fundamental functions of the MRA Service Coordinator and HCS Provider
- ▶ Staffing, training and equipping MRA operations to provide qualified and consistent Service Coordination for HCS participants
- ▶ Productive communications with the HCS Provider network to ensure effective long-term working relationships
- ▶ Support for HCS participants and families to minimize service disruption and promote progress towards each person's desired outcome.

DADS' Transition Timeline

- ▶ September 2009 – DADS stakeholders' meeting on draft HCS and Service Coordination rules held on 9/14/09.
- ▶ January 2010 – Proposed HCS and SC Rules sent to MCAC & DADS Council for approval to publish in Texas Register.
- ▶ February 2010 – Proposed Rules published in Texas Register for 30 days
- ▶ March 2010 – Public comments on proposed rules received and reviewed.
- ▶ April 2010 – Proposed rules revised as needed, response to public comment.
- ▶ Training for HCS Providers and MRAs begins.
- ▶ May 2010– Training for HCS Providers and MRAs continues.
- ▶ June 2010 – Implementation of HCS and SC rule changes–HCS Case Management becomes MRA Service Coordination

MRA's Transition Timeline

- ▶ October 2009 – Plan and schedule Provider & MRA Transition meetings
- ▶ December 2009 – Obtain access to Electronic Data Transfer System (EDTS)
- ▶ January 2010– Begin establishing MRA consumer records
- ▶ February 2010– Develop a MRA SC for HCS transition webpage on Center's website
- ▶ March 2010– Educate local Advisory Boards, PNAC and Center Board of Trustees

MRA's Transition Timeline

▶ April 2010

- ▶ Plan and schedule Consumer/Family information meetings
- ▶ Determine staff requirements– HCS service coordinators, supervisors & support
- ▶ Develop HCS service coordination job duties and job descriptions
- ▶ Develop methodology for establishing and assigning HCS Service coordinators' caseloads
- ▶ Revise policies and procedures as needed
- ▶ Develop HCS Service Coordination training plan and curriculum
- ▶ Begin process of hiring HCS Service Coordinators
- ▶ Begin process of hiring HCS Service Coordinators
- ▶ Begin training HCS Service coordinators, including training provided by DADS
- ▶ Assign Service coordinators to HCS participant caseloads
- ▶ Create Provider/MRA contact lists

Harris County MRA: Infrastructure and Number of SCs Needed

- ▶ Number of staff persons to be hired – 83
- ▶ Number of service coordinators to be hired – 61 (February and March, 2010)
- ▶ Service coordinators will be home-based; except Waiver Enrollment service coordinators

Factors Considered:

- ▶ Number of HCS providers – 229 (82 inactive; 147 active as of January, 2010)
- ▶ Number of persons enrolled in HCS program – estimated 2,800 by June 1, 2010)
- ▶ Caseload size – 45 consumers per service coordinator based on monthly face-to-face contacts pending assessment of consumer's level of need. Frequency of consumer contacts will be based on level of need; some consumers may require quarterly contacts.

Harris County MRA Transition Activities

- ▶ September – Determined SC:HCS Infrastructure requirements (SCs, SC Floaters, SC Mentors, management and support staff)
- ▶ October 2009 – Held quarterly HCS provider meeting
- ▶ November 2009 – Hired Clerical Support to scan 2,480 GR records to accommodate 27HCS consumer records
- ▶ January 2009 – HCS Provider and MRA transition meeting; will have monthly meetings thereafter during the transition process.
(schedule posted on MHMRA (*MRSO*) website)
- ▶ December 2009 – Hired two (2) SC:HCS Program Directors
- ▶ January 2010 – Hired four (4) SC:HCS Team Leaders

Harris County MRA Transition Activities

- ▶ January 2010 – Hired 30 SCs with start date in February
- ▶ January 2010 – In process of hiring 31 SCs, including SC Floater, with start date in March
- ▶ January 2010 – Began process for reviewing HCS Provider/consumer information in DADS Electronic Data Transfer System (EDTS)
- ▶ January 2010 – Assigned HCS Providers to SC:HCS teams by Provider
- ▶ February 2010 – Develop a MRA SC for HCS transition webpage on *MRSD* website.
- ▶ February 2010 – Internal required training of service coordinators and other SC:HCS staff

Harris County MRA Transition Activities

- ▶ February 2010 – Begin assignment of HCS participants to 30 service coordinators by provider
- ▶ February 2010 – Begin process of development of P&Ps based on draft Revised HCS Rule; will modify as necessary upon approval of Revised HCS Rule
- ▶ February 2010 – Create Provider/MRA Contact lists
- ▶ February 2010 – In conjunction with HCS providers, begin planning consumer/family meetings
- ▶ March 2010– Educate IDD–PAC, Board of Trustees and community
- ▶ March 2010 – Continue training of service coordinators and other SC:HCS staff

Harris County MRA Transition Activities

- ▶ March 2010 – Continue assignment of HCS participants to the remaining 30 service coordinators
- ▶ March 2010 – Obtain Consumer information from HCS Provider not available in the Electronic Data Transfer System (EDTS)
- ▶ March 2010 – Transfer of Provider records
- ▶ April 2010 – Training provided by DADS
- ▶ May 2010– Quality Assurance staff for SC:HCS to be hired
- ▶ May 2010 – Training provided by DADS continued
- ▶ June 2010 – Implementation of SC:HCS

Comparison: MRLA and MRA Service Coordination

MRLA

- ▶ MRA conducted Survey & Certification activities.
- ▶ Service Coordination provided by the MRA.
- ▶ Service Coordinator facilitated Person Directed Plan (PDP) and documented the outcomes.

Draft HCS Rule

- ▶ DADS conducts Survey & Certification activities.
- ▶ Service Coordination provided by the MRA.
- ▶ Service Coordinator facilitates the Person Directed Plan (PDP) and documents the outcomes.

Comparison: MRLA and MRA Service Coordination

MRLA

- ▶ Provider submitted strategies to the MRA for approval
- ▶ MRA completed the initial IPC and entered the IPC in CARE.

Draft HCS Rule

- ▶ Provider develops Implementation Plan based on PDP
- ▶ MRA completes initial IPC and enters the IPC in CARE.

Comparison: MRLA and MRA Service Coordination

MRLA

- ▶ MRA completed and entered the IPC renewals and revisions in CARE.
- ▶ MRA completed initial ICAP and every 3 years.

Draft HCS Rule

- ▶ Provider completes and enters the IPC renewals and revisions in CARE. MRA agrees or disagrees.
- ▶ MRA completes initial ICAP. Provider completes ICAP every 3 years. MRA agrees or disagrees and signs in CARE.

Comparison: MRLA and MRA Service Coordination

MRLA

- ▶ MRA completed initial MR/RC and entered MR/RC in CARE system.
- ▶ MRA completed annual MR/RCs and entered in CARE system.

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- ▶ MRA completes initial MR/RC and enters MR/RC in CARE system.
- ▶ Provider completes annual MR/RC and enters in CARE. MRA agrees or disagrees and enters in CARE system.

Comparison: MRLA and MRA Service Coordination

MRLA

- ▶ DADS assigned LON
- ▶ MRA submitted Utilization Review for DADS' approval.

Draft HCS Rule

- ▶ DADS assigns LON
- ▶ Provider submits Utilization Review for DADS approval.

Draft HCS Rule: Role of MRA Service Coordinator

- Service Coordinator, consumer/LAR form service planning team (SPT) with other participants selected by the person served/LAR including provider.
- Continue enrollment of individuals into HCS program.
- Conduct person-directed planning and completes person directed plan (PDP) specifying needed services.
- Update Person Directed Plan annually or as needed.
- Coordinate completion of Individual Plan of Care (IPC) with HCS provider, person served/LAR.
- Service Coordinator, person served/LAR or provider may request revision to IPC and/or PDP. Service coordinator agrees or disagrees with IPC renewals and revisions.

Draft HCS Rule: Role of MRA Service Coordinator

- Monitor provision of individual's program services based on the needs of the person.

MRA Service Coordinator monitoring must:

- Document person's progress towards achieving outcomes in PDP
- Ensure concerns with implementation of PDP are communicated to Provider and attempts are made to resolve.
- Notify Provider if SC becomes aware that an emergency necessitates an HCS service to ensure health & safety and service is not on IPC or exceeds IPC amount.

Draft HCS Rule: Role of the HCS Provider

- Complete assessments and submit LON requests to DADS
- Coordinate completion of the IPC with MRA SC, persons served/LAR and submit to DADS for approval
- Develop Implementation plan for delivery of the person's HCS program services, with the person/LAR, based on the person directed plan.
- Deliver services according to IPC authorized by DADS
- Monitor the delivery of services on IPC in accordance with HCS Program Certification Principles
- Monitor progress related to program services in accordance with the Implementation Plan.

Draft HCS Rule: Role of DADS

- Conduct residential and certification reviews of HCS Providers to evaluate compliance with HCS principles.
- Continue to approve Individual Plan of Care and Level of need (Utilization Review).
- Expand current role to oversee Service Coordination for individuals in the HCS Program (MRA Contract Accountability and Oversight unit).

Updated Information Regarding Home and Community Based Services (HCS) Case Management Transition

DADS' Website: <http://www.dads.state.tx.us/hcstransition>

Information include:

- ▶ Planning process and DADS activities and timeline related to this change;
- ▶ A frequently asked questions (FAQ) section that provides questions and answers regarding this transition. Some of the topics include an explanation of responsibilities for HCS providers and MRA Service Coordinators, the new service delivery model based on Person-Directed Planning and details about how monitoring and oversight will occur. The FAQ will be updated throughout the time of implementation;

Updated Information Regarding Home and Community Based Services (HCS) Case Management Transition

- ▶ **Links to information letters, alerts and other notices on the DADS website related to this transition;**
- ▶ **Information regarding DADS' HCS Program rule development and revision activities and schedule;**
- ▶ **Links to the HCS and Service Coordination proposed rules as they become available;**
- ▶ **Information regarding HCS program handbook development; and**
- ▶ **Information regarding training for HCS providers and MRA staff before the transition, as it becomes available.**