

Policy Academy Meeting Minutes Tuesday, March 12, 2013

Facilitator: Deb Henderson-Guenther
Note Taker: Andrea Simon

Members present: Angie DeJong, Lucy Hilgendorf, Debra Shaw, Craig Wehner, Jennifer Mikalowski, James Mazzetti, Jacqueline Meyer, Megan Schueller, Kathy Hollon, Deepa Pal, Andrea Simon, Deb Henderson-Guenther, Linda Vegoe, JoAnna Richard, Linda Raap, Allison Gordon, Mike Greco and John Haugh

Follow-up Items:

Comparable benefits update by Allison done by a subgroup. Clarifying language on the policy will be sending out as the original language was not very clear. Now details of what are NOT comparable benefits are listed. Take the info back to staff meetings that non-profit agencies are not comparable benefits.

Draft language:

Comparable Services and Benefits

Before providing any VR services to a consumer, or members of a consumer's family, except for services exempt from determination of comparable benefits, DVR staff must determine if comparable benefits or services exist under any other Federal, State, or local public agencies, by health insurance, or by employee benefits and whether those benefits or services are available to the consumer. Services and benefits provided by non-profits (e.g. charities, churches, Goodwill, clothing banks, etc.) and consumer PASS Plans through Social Security Administration are not considered comparable services or benefits.

If available, the comparable benefits and services shall be used in whole or in part to cover the cost of VR services, unless such determination would interrupt or delay:

- The progress of the consumer toward achieving the employment outcome identified in the plan for employment.
- An immediate job placement.
- The provision of such service to any consumer at extreme medical risk.

The following services are exempt from determination of comparable benefits:

- Assessment for eligibility and plan for employment needs.
- VR counseling and guidance.
- Referral and other services to secure services from other agencies.
- Placement services.
- Rehabilitation technology.

Comparable benefits do not include awards and scholarships based on merit.

Further discussion went on to clarify that non-profits are not comparable benefits but we can still allow them to go there if the consumer chooses it. It could be the lowest cost option but it is not a comparable benefit. We can still buy them new clothing and some from Goodwill if that is their choice.

Transportation Guidance update by Linda R. regarding the subgroup that formed to work on this from last meeting. Tim from Western Independent Living will be consulted to address long term needs as well as our short term needs of transportation issues. Tim will be invited to come to the next workgroup meeting before we develop guidance on this topic.

Staff requested if there was a way to speed up the payment to the car dealerships after we send a purchase order. In another non-profit program, the car dealerships have told staff they can get a check in 3 to 4 days. Dane county shared they have 12 vendors that will take purchase orders after they worked on after this policy came out and have had success with the process. WDA 6 had an issue that the car dealer would not release the car until they had the check in hand even on the day of the purchase. The dealer would accept the PO but they would not release until they had the check on hand. Linda shared in Milwaukee changed their mind after the sale as well in the PO process. John expressed how the state money is good every single time on the PO's and they will get paid after 30 days. As staff we need to share that when setting this up with a vendor in every case that the PO comes then the check follows after 30 days. Informed choice is not letting the person choosing which place they want to get the car at but it is explaining how one vendor will take the PO's and we need to use that. We can not reimburse for vehicle purchases or do advances. Please make sure when we buy a vehicle that it is bought for employment reasons only and for the job outcome. We need to look at the lowest cost option.

Appeal Information update by Linda R. She handed out a copy of the Consumer Rights and Appeals Statement out. It is being listed on the back of some letters, some letters say a brochure is enclosed and some list it on the front. Change suggested is moving the CAP information to the bottom of the Consumer Rights document and above list supervisor with contact info. This change would affect four closure and all eligibility letters. It would be release in May on IRIS system changes.

Megan explained her WDA has it in the introduction orientation they have the Consumer Rights/Appeals Statement as a slide; then, they explain what it means and how to use it.

Group decided to use Linda's second choice to list on the back of the letters. CAP also had a few word choices that would make it read better about their services.

Think Possibilities Appeal Form will also be included in the letters if wanted. The tip sheet recommends currently that you put it in. Staff currently is supposed to give rights at eligibility, IPE development and closure for sure. Group thought one letter was okay with it in.

Counselor disclosure will also be updated to the new state licensing agency name and records will be kept for seven years. Post employment services are only available as long as we still have copy of the record (seven years now). Clarification is that the employment plan needs to be related to that same employment which they closed with us, not a different employment plan or goal then they need to reapply. Counselor disclosure letters will be updated in May.

Childcare WI Shares program update by Allison. Allison and Linda R. will be meeting with a rep this week to get more info for us.

Employment Specialist – JoAnna update

Business Service Consultants is the new name the group decided to call itself. DVR will be focusing on a business services team concept. Focus on careers instead of jobs to develop talent. These consultants will be an arm of the counselors and changing the focus of employers being a customer for us. Three directors put together a curriculum for training the Business Service Consultants for first two weeks. First group has been hired and trained; second group is being recruited for at this time and soon will be on board for all WDA's. Moving modern DVR toward dual customers: businesses and job seekers. These Consultants will be integrated into the local WDA's business service groups.

The Consultants will also see if our "job ready" consumers are really job ready or not. They will be working with employers in our region to give us a pipeline to job placements, connections. Goals for Consultants: 30 successful employments, 60 business connections, 25 new On-the-job placements, serve as federal hiring contact, serve on local partner business service teams, market DVR employment tools and talent.

Salesforce is going to be encouraged in the areas where it is being used in the WDA's where it is being used by the local boards. The areas not using Salesforce, JobNet Business is being used to make local information.

90 days follow along requirement prior to closure – Andrea

Does policy really required that we follow the additional 90 days on an OJT? The rationale as to why we do that and do we have to? SLT said yes, it has to be 90 longer after the service has started. Move to status 22 to make easier to track at the point. Need to keep the case open for 90 days after that service is done at a minimum. We set up the OJT and we follow 90 days after when ever that service is ended.

The intention of the policy is for the service provider to get paid for the hire up front at the start of the OJT. The service provider will get paid 90 days after the OJT starts as it is a hire.

Question: Can a CCC sign the OJT form? As long as there has been direct DVR contact with an Employer, any staff from DVR can sign it. The Counselor needs to approve.

Discussion on how the OJTs are used statewide. Having a range to use for the OJT's is good for individuals to gage what is needed to get some hired. Forms have 90 days listed on them as the max which could make it difficult to do lesser amounts. Service providers have negotiated the amount of the OJTs ahead before the counselor gets involved for the form to be filled it out which puts the DVR staff in a bind to follow what was agreed upon. This was to be an incentive to take a leap of faith to hire someone with a disability.

The OJT is a service for the consumer, not the business so it needs to be focus if it is needed. The 90 days following up after the OJT ends is the service to the business which we are doing. We landed on 90 days to keep it simple for consumer and business. We are off setting in house employer training costs by offering it.

Job coaching is a different service and does not need 90 days after the last hour is done. It is included in the knowledge base with an example of the work boots. We can buy the work boots anytime in the 90 days follow-up or as post employment but it does not affect the 90 day minimum follow along. If an OJT is not offered or less than 90 days it is not because we are trying to save DVR money, it should never be for the reason.

Next step: Business Services team to review OJT procedure along with Policy Analysts to determine any needed changes.

Subpoenas – staff being served - Andrea

Situation was a counselor in WDA 5 was served at home, 9 PM in the evening for a client they work with. The server was a non-uniformed person at the door which was very scary to the counselor who was home alone.

Next Step: JoAnna will ask our legal counsel and let us know how to handle these situations.

MA Fee Schedule – Jennifer

Staff has difficulty finding MA rates and codes for procedures. It is very difficult to get MA rates. We use this process for hearing aids: if the vendor won't give us MA rate we do invoice rate plus 15%. If the vendor won't do that then we need to do 3 estimates and take the lowest cost.

We refer to MA rate because it is lowest cost option not a comparable benefit. The MA chart is not user friendly for staff.

Next steps: Group suggested a sub committee on this topic. The sub group is Allison, Angi and Jackie.

Activation Letters – Linda R.

Group looked at tone of letters for activation. The word "Congratulations" was removed and the paragraph of stating we will close your file if we do not hear from you by a set date. We need to make two attempts of contact with people before we close their file (one being their preferred mode of contact) and this letter is the first attempt. Policy members are to look over letter and email Linda R. suggestions for wording in the next couple weeks.

Linda R. also took verbiage out that we enclosed the IPE worksheet or packet in the letter. The group felt the majority do not complete it or return the worksheet currently. If we have an IPE orientation at the WDA it has not been sent along. CAP has also been called to help them fill it out and they do not help with that. Statewide WDA's have different forms and it was suggested we use one form.

Next steps: Next Policy Academy meeting we are to email a copy of what is being used locally so we can all compare them.

Communicating CAP Decisions to Counselors, Standard Practice – Jim M.

Issue was brought up because a counselor was upset that a decision was made and she was told how to implement the decision but not told about the process. Deb clarified it depends who made the decision and how it was made. Counselor would like CAP to contact them before any decision is made on a case in every case. Counselor would know that CAP is involved because a release would be added to the file. CAP does not make the decision on a case but the Supervisor and the Director does and implements the change by letting the Counselor know that. Deb also explained that if she believes there is a larger issue if she feels a Counselor has interpreted the policy incorrectly she will go to the Supervisor or SLT instead so the broader issue of policy is addressed to the staff and in some cases a review for all staff if it applies.

Reminder to staff to not take the appeals process personally as we all have decisions over turned. Recommendation is the staff should talk to their Supervisor or Director directly about the situation as this is not something CAP is deciding for them.

If WDA's have any questions on how CAP works on cases, please invite them to a WDA meeting to explain the process.

Confidentiality Guidance Piece - Allison

Including when we do not need a release will now be on the confidentiality release. Our policy states all information needs to be reviewed by the Counselor before it is releasing, our guidance was missing that as not all should be released to a consumer. We are not to cause harm by releasing psychological records which a staff may not be able to handle or things stamped do not re-release on them. Third, all legislative inquiries need to go to John Haugh so details are not given out on cases and if more is needed then a release will be required. All inquiries from legislation should go to John Haugh, do not answer the questions at all even in general and refer them to John.

Family members of staff who apply for services should be handed as ethically as possible and almost always will be moved to another office to be serviced. Typically we block access to all staff who doesn't work with them. Supervisor and Director will have access in all cases which are connected to WDA. Guidance will come out on this topic. Group is asked to discuss this issue and how locally to handle it, how case discussions would be handled in these cases as well. Consultation is recommended in all cases with family and relatives even if it is with supervision. We need to make sure the consumer is protected and if something does not feel right there is a reason for it and we should question it.

We can release medical records we have in our file even if we didn't produce them if they are not stamped "no re-release" on them. Staff is to remember clients can get copies or the IRIS case notes so please be objective in what you write, if you write snarky comments the clients can read that. Have them write a letter asking for release of their records or they can sign a release to get them. Staff should know when records are released from a file by a case note being put in the file. CAP does not re-release any information to the clients and requires the client to ask DVR directly for their own copy.

Next step: PA members to take time at WDA meeting to review and discuss the Confidentiality Guidance piece including points listed above.

Online Application – Review of upfront piece – Allison

Review of what on-line applicants go through currently. A brief self-assessment was suggested and if they answer "no" or "yes" to a question then it brings up in red what they need to qualify for our services. It gives them more information as to what we mean by it in hopes that they can move forward to the application on-line. We don't save any of the answers they give on this self assessment for us and it does not block them from applying. Group was happy some sort of filter like this was put in but maybe more context might be helpful as to what is a disability. Links that take them to more information are included in the self-assessment. If the applicant wanted to skip this, they can just scroll on by it.

If you find a consumer didn't fill out the application or if a guardian is not aware it is not a valid application. For minors we need to get guardians to sign it and would need to contact them before we reject them. Language with Family Care, in DHS waiver language, states consumers should be referred to DVR so we are getting some inappropriate referrals or consumers who do not want our services but they are being told by case managers they have to apply to us. SLT will discuss with DHS to see if they can change that language.

Google search different states DVR to see the videos on YouTube orientation or intros to services. Minnesota and Texas were examples brought up.

Next steps: Allison will work with management and Larry on finalizing language and plan to have completed by June 2013.

Consumer Handout on Verification Documentation – Deb S./Allison

Can we create a handout to show them what is an appropriate receipt? Staff need guidance to give consumers to get a reimbursement on a timely basis statewide. A sheet was developed and handed it out as one example. Do we want a general one and do we want training grants added to this sheet? Deb G. shared a situation where it took a three hour meeting with many staff attending to get what we needed for verification and is there any give on what we can take. An idea that came up was asking for a receipt to be faxed from a business as the name would come via the fax on top of the item sent over to meet the requirement if it was not printed on the original receipt. Handwritten receipts signed by counselor might be considered. RSA is looking for patterns of fraud in the system.

Consumer who prints in front of a staff or a staff prints the info from the school website where the school name or students name does not show on the sheets. Staff need to see the website when it is printed to accept this and print it there to write the consumer's name on it and write the name of the school on it or print the front screen of the webpage where the school name is listed. CCP has accepted it from the staff if they can verify where they saw it and print the info on it.

Next step: Small work group to develop a one page guide for staff to give consumers for proof of payments is: Linda, Deb S., Kathy, Jennifer and Lorie.

IPE Checkboxes – John Haugh

This is referring to the check boxes at the end of the IPE form in IRIS which we select yes/no. Disability Rights WI advocates had concerns that when they participate in meetings that DVR staff do not ask these questions and assume yes then move on to have the person sign it. CAP stated they always have these questions asked when they are in the meeting. One issue might be that in amendment we don't need to answer those questions again. The IRIS system does not uncheck them in an amendment so it does appear as we don't go over them again.

Next step: Remind staff to go through those questions at the original IPE meeting when the clients are asked to sign.

Assistive Technology – Guidance Piece - Megan

Megan gave an update of AT and is there a tech spec need for AT? Best practices? Where do you feel comfortable? Group shared this was a great idea and having tech specs on AT, best practice would be very helpful. Having a vendor list was another idea of something that would be helpful. Guidance on how to do referrals would be helpful for staff. A code of ethics for rehab tech had been developed by some AT experts and might be useful for staff to know about. A rehab engineer or occupational therapist in house would be helpful to give staff recommendations on AT before purchase. Some conflict of interest can happen in this area as we ask the AT people for their opinion on their own work basically and we don't disclose that to our consumers.

Linda reminded the group that Cindy Pickler can be accessed to teach staff about how to use what is already in Windows that can be used instead of staff assuming they need to buy assistive software as a screen reader since it has the function if we knew more about it. Adding software means a computer might need to be bought as well with more memory or a larger processor. We do not want to buy more things that consumers are not using but items consumers want to make their employment goal.

Knowledgebase – Deepa

She wondered if knowledgebase could be organized better to be user friendly. Request was to have it set-up like Google in the search function. It is an underused resource because of how difficult to use for staff. A study hall on how to effectively use it was suggested.

Next step: Linda will take it to Audrey to see if she could come to our next meeting to discuss.

Rehab Conference – Deb G.

Susie Eberhard, a professor at UW Stout, is quite ill. She will be at the Rehab Conference, Thursday, April 11th, to see people at the social 5:45 to 6:45 PM if interested. Please pass along to staff in case they will be there.

Check out