

Policy Academy Minutes
July 9, 2013

Madison DVR Conference Room

Present: Angie DeJong, Weneaka Jones, Debra Shaw, Craig Wehner, Jennifer Mikalowsky, James Mazzetti, Mary Wollin, Megan Schueller, Kathy Hollon, Deepa Pal, Andrea Simon, Deb Henderson-Guenther, Sara Sharpe, Linda Vegoe, Mike Greco, John Haugh, Meredith Dressel, Linda Raap, Allison Gordon

Meeting was called to order by Weneaka Jones, facilitator, at 9:00 am.

Topic 1: Self-Employment Toolkit 2.0 (John/Allison/Deb HG)

Background: DVR management sought feedback from the field and was told the Toolkit was good but cumbersome. A Process Improvement workgroup was established and used a value mapping process to make a more efficient process. Self-Employment Toolkit 2.0 has a 12 Step process.

The workgroup broke into three sub-committees to develop the new areas of the toolkit.

1. Fee Schedule
2. Assessing Consumer's ability
3. Technical Specifications

Key Change for Self-Employment Planning:

The first decision point in the process is not the feasibility of the business idea. The first decision point (Step 2 of 12) is to determine if the individual is a viable candidate for self-employment.

Fee Schedule Workgroup

The draft fee schedule was reviewed and background was provided. The workgroup looked at the policies of other states. Policies from other states included requirements, such as:

- The need for the individual consumer to demonstrate the ability to cover the percentage of funding not covered by VR.
- The need for the individual consumer to demonstrate the ability to obtain the working capital; working capital is defined as what is required to operate the business.

John added that current self-employment plans will continue to follow the current toolkit process. New cases will look at the feasibility for the individual to operate the business. The business idea will be analyzed after the individual's ability to operate a business has been assessed.

Jennifer suggested that guidance should remind staff to talk to the consumer up front about what will indicate that the goal has been achieved, which will determine closure.

Deb Shaw suggested a form to state what DVR will contribute and what the consumer will contribute, by what dates, and have that form signed by DVR and the consumer.

John commented that the IPE and business plan will incorporate that information to serve that purpose.

Important: The Toolkit 2.0 will use the term **participation in the/their business cost**. It is not a contribution to the cost of a service. The services will be listed in the IPE. The business is the successful end result.

Assessing Consumer Ability Workgroup

The workgroup researched tools and chose the Business Assessment Scale (BAS) which is a copyrighted tool that uses an established process to assess the consumer's ability to operate a business.

Jennifer suggested having Section 3 (Q12) in an Excel spreadsheet. Response: the worksheet will be in IRIS.

Training will be provided to staff (prior to implementation?). Additional training on 2.0 will be provided to train a self-employment process "expert" in each WDA.

Technical Specifications Workgroup

This workgroup focused on the Feasibility Study (Step 3 of 12) and Business Plan Development (Step 6 of 12). Kathleen Enders will work with the toolkit information to develop technical specifications with payments for the specific services.

Question: Will business mentoring be an option as a paid service?

Answer: It won't be a service identified in the technical specifications, but it can be developed, as needed.

Reminder: The Toolkit for self-employment startup will not apply to existing plans or supported self-employment plans, and does not apply to requests to start non-profit ventures.

Review of the Twelve Steps

A feasibility analysis is included to provide a consistent way to communicate the progress on each step in the process.

Red light,

Yellow light

Green light

As the VRC and DVR consumer work on each step, do not proceed to the next step until the current step is addressed (is green).

Important: Assessment, training, rehabilitation technology expenditures do not count towards the business startup costs.

Timelines have been added, based on WDA 7 practices.

The business review committee will schedule a meeting within 10 days.

A response letter will be written in 3 days.

A business plan review committee member will respond to follow up items (open action items)

Three to five members has been the average number of members on these committees.

Suggestion: It would be helpful to have position descriptions for business plan review committee membership.

Suggestion: Create a statement for the consumer to sign that once an amount is approved, any additional requests require an exception.

Suggestion: When the training for staff is developed, include success stories to illustrate positive outcomes.

Appendix 8 – Mentoring – this section was reviewed in detail. Deb Henderson-Guenther will provide some sample agreements for mentoring assistance. She also recommended SBA resources on mentoring agreements.

Topic 2: Appropriate Receipt Guidance (Linda R)

Linda reviewed a guidance piece on what needs to be included on an appropriate receipt for a VR service.

CCP provided information on accessing appropriate receipts for training grants.

Question: what if a receipt does not have all 5 components?

Question: Can the consumer and VRC sign off that the item was purchased?

Answer: some VRCs use the alternative receipt form if a receipt with all the necessary information cannot be obtained.

John acknowledged the time consuming nature of this process. He noted that DVR is looking for alternatives to serve as receipts for training grant funding.

Linda R will revise wording for the fourth bullet point in the Training Grant Funding section of the guidance piece.

Discussion: what is the best way to share this information with consumers?

- Add the information to the Fiscal Responsibilities handout
- Put the information on a wallet size card the consumer can reference when they are obtaining a receipt
- Have the ERL form and the Appropriate receipt form print out at the same time
- Separate the Appropriate receipt information and Training Grant Funding and add it to the consumer information
- Provide an example of an appropriate receipt

Action Item: Policy Academy members will ask for feedback from their WDA on their preferences on how to distribute the receipt requirements to consumers.

Question: Is it possible to simplify the ERL form?

Working Lunch topics: Training Grant Fiscal Process and the Draft Referral Process

Topic 3: Training Grant Fiscal Process (Lorie Lange)

- Training grant credit load is not always matching the number of credits the student is taking
- Reviewed the email from March 4th that was sent to all DVR staff

Action Item: Policy Academy members were asked to remind staff of the 3/4/13 email content

Linda Raap asked Lorie for her feedback on the Appropriate Receipt and Training Grant guidance piece discussed earlier in the meeting.

Lorie confirmed that the alternate receipt or VR staff confirmation can be used. If a receipt does not include the business information, such as from small business cash registers, business card from the business can be included to supplement the receipt.

John Haugh commented that any change in the Training Grant process would not occur in the middle of a school year. Any changes would be implemented for Fall, 2014.

Topic 4: Referral Status 00

The current process, having the application be the first step, has missed a step, allowed in law, to provide information about VR. The referral status, in combination with the orientation sessions, will allow a person to make an informed choice about applying.

Data has shown an average of 50% of applicants follow through once the application has been submitted. This indicates a need to provide information to individuals and guardians that may be different than their first impression of what DVR is about.

John said the intent of bringing back the Referral Status is to focus staff time on direct service with interested individuals.

Meredith stated that there will be some flexibility on how transition cases are handled.

Angie pointed out that the use of orientation sessions has made major improvements in her WDA. She used to be scheduling intake appointments five to six weeks out on her schedule. The average is now two weeks.

Timelines: The Referral Status is being incorporated into IRIS. The plan is to provide training in September and implement the use of Status 00 on October 1st.

Topic 5: MA Fee Schedule (Angela, Allison, Jackie)

A handout was provided.

Allison contacted other states for feedback on fee schedules for Medicaid.

More providers accept the Medicare rate.

Where do you find Medicare rates? cms.org

Deb suggested that Sara Sharpe (UW intern with CAP) could find some of the more common rates that DVR would need and share them with Policy Academy.

Note: Possible change related to Hearing Aids. RSA is planning to classify hearing aids as Rehabilitation Technology rather than a medical device.

Topic 6: IPE Timelines and Extensions (Jennifer)

WDA 11 feedback: We looked at the data and statistically there was no correlation between extensions and outcomes.

Discussion followed on 90 day timeline for IPE development vs. 120 day timeline

The rationale for extending the timeline was to complete assessments and develop a more appropriate plan.

Suggestion for consideration: 90 days for the typical plan; 120 day for Category 1 plans.

Jennifer recommended looking at statistics (statewide) from IPEs done in 90 days compared to IPEs with extensions.

Suggestion: Refer the issue to the GAR Workgroup for discussion.

Note: Proposed Reauthorization of the Act includes a 90 day timeline for IPE development.

Topic 7: Updating of Limitations and Functional Areas (Jennifer)

Jennifer gave an example of a case where important disability information had been obtained after the FAR was completed. The FAR cannot be changed. Since it is common to have a change in counselor or another team member assisting a consumer, she feels it is important to have a place in the case file where a synopsis of the most current information is available.

Deb HG asked if there could be a case note label for updating disability information.

John suggested Policy Academy should consider if this (and other issues) can best be addressed through voluntary changes vs. mandated ones.

This item will be continued at the next meeting.

Topic 8: LD Evaluations – English as a second language (Jackie)

What options does VR have to obtain an LD assessment when the individual is not fluent in English? An interpreter can be difficult to find, especially in northern Wisconsin. Is the use of an interpreter during an assessment an effective means of identifying a learning disability?

Action Item: Policy Academy members will ask for input in their WDA on LD assessments for individuals with English as a second language.

Next Meeting Agenda will include:

1. Updating of Limitations and Functional Areas
2. Family Care update
3. LD Assessment for ESL