

Policy Academy Meeting Minutes
3/11/14

Facilitator: Caralee Morrison
Note Taker: Tim Trokan

FOLLOW UP FROM JANUARY

- Policy manual updates were approved by SLT.
- They will be discussed at the March study hall and take effect April 1.

TRAINING GRANT UPDATE

- A Value Stream Mapping (VSM) exercise was completed for the training grant.
- The training grant will eventually be done electronically.
- After the student completes their portion, an alert will be sent to the school and DVR representative to review prior to processing.
- Payments will go directly to the school beginning Fall 2014.
- Ten days into the semester the school will verify the bill for the student and then we will issue an authorization to the school.
- Students will also be required to regularly meet with an advisor at the school to plan out their schedule to complete the degree and discuss jobs after graduation.
- DVR counselors will now be encouraged to regularly review the student's academic plan with them.
- The new interactive training grant form will be implemented as a pilot program for the UW schools this fall, with full implementation in fall 2015.
- Money for books and transportation will be sent to the consumer from the school or other method as needed.
- Grades will now come directly from the school via an unofficial transcript.
- The reduced paperwork will allow more time for counselors to do guidance and counseling.
- It is anticipated that the current DVR training forms will continue to be used for Fall 2014. However, staff should wait until after receiving further instructions, before sending the training grant forms to consumers for the 2014-15 school year.

RELEASE OF INFORMATION FORM

- Concern was expressed by WDA 6 that some hospitals and clinics require additional releases be signed because the current DVR Release of Information form is not HIPPA compliant.
- Some organizations also require their own forms be used.
- Several WDA's keep copies of releases of information from organizations where records for multiple consumers are requested.
- It was decided that no changes will be made to the release at this time. Many institutions require the use of their own release and this is unlikely to change, even if changes were made to the DVR release to make it HIPPA compliant. DVR is not bound by HIPPA regulations.

DVR TECHNICAL SPECIFICATIONS

- Concern was expressed that some vendors, although may be doing good rehab, are not following the Tech Specs, but still being paid.
- WDA 4 has a spreadsheet highlighting requirements of the tech specs that they review with providers.
- Some WDA's will review reports from vendors who consistently don't meet the tech specs.
- Central office reviews the Tech Specs annually to address concerns from WDA's.
- If the reports are not acceptable, vendors should not be paid until the report is amended. Field staff is responsible for determining if the reports are acceptable and payment should be made.
- If questions on the Tech Specs for the Supported Employment Consultation meeting have been answered, the SECM can be skipped and you can proceed to the Supported Employment Assessment.

SERVICE PROVIDERS TRANSPORTING CONSUMERS

- Service Providers have expressed concern that they are being asked to transport consumer as part of job development or other services. Service Providers should discuss requests to transport consumers with the Vocational Rehabilitation Counselors to explore other options.
- Service Providers should not be providing transportation services to consumers. If they do, it is at their own risk.
- Currently the Tech Specs do not say that Service Providers should not be transporting consumers. Transportation is only allowed in some job coaching situations where this has been approved by the DVR Counselor/Supervisor.
- Kathleen Enders will explore adding language to the Tech Specs to indicate that those services are not included in any services.
- Counselors should discuss with the service provider or their supervisor concerns if the vendor is consistently transporting consumers or requesting payment for transportation services. If the job development provider/or other provider requests payment for transporting a consumer after the fact, DVR will not pay for this service. Service Providers are not vetted to provide transportation services.
- Members of Policy Academy will survey members in their WDA to determine the frequency of service providers transporting consumers and how it is addressed locally and report back at the next PA meeting.

DVR TECHNICAL SPECIFICATIONS - JPDP

- Concern was expressed from WDA 8 that some counselors don't like the consumer and vendor to meet independently to discuss the Job Preparation and Development Plan (JPDP). They prefer to meet with the vendor and consumer to develop the JPDP to insure consistent information is being discussed.
- Kathleen Enders stated the Tech Specs are flexible and additional meetings between the counselor, vendor and consumer can be held. According to the Tech Specs, the counselor, vendor and consumer must have one meeting within the first 30 days of the referral. The counselor can review the JPDP after a meeting has been held, address any concerns with consumers and when everything is acceptable to the consumer and counselor, sign the JPDP.

- JoAnna Richard expressed concern that consumers are not being registered on Job Center of Wisconsin and providing resumes as required in the JPDP Tech Specs.
- WDA 10 provided service providers standard forms that include expectations of services and a copy of the Tech Specs for the services they are providing. It was suggested that reports become standardized to make reviewing reports and services easier.
- The Contract Specialist provides report forms and sample reports that are available on the DVR provider external web page.
- Service Providers are not required to use the Tech Spec forms. They may choose to develop their own. No WDA should be creating forms to be used without discussion with the DVR Contract Specialist.
- Concern was expressed that past experience reflected that "cutting and pasting" was overused and did accurately reflect what was taking place with the consumer.
- Adding a checklist of the required Tech Specs of the JPDP was discussed to insure that all of the required elements are included. It was agreed the new contract specialist will review the reports available and add reports when necessary.
- A new IRIS update is being developed where vendors will automatically attach a report to a header and attach it directly to IRIS.
- Deb Henderson-Guenther suggested we discuss adding resume development as a service. It can currently be provided as a separate service.

APPLICATION DATE

- It was agreed that the date entered in IRIS for referrals is the date the form was received either electronically or in the mail. Applications are down 40% since the initiation of the referral process. It is anticipated the wait list for category 2 will be eliminated by the end of the year.

FISCAL POSTER

- Deb Henderson-Guenther shared that a poster being developed to help consumer understand purchasing rules. A handout including information for the poster was reviewed. It was agreed that the poster will include that items must not be purchased by the consumer until they have been notified by DVR personnel that the necessary paperwork has been completed. Several estimates may also be required prior to the purchase an item or service being approved. The next step is a draft will be provided to Policy Academy members to review. Counselors are also encouraged to include steps for purchasing items as progress measures.
- It was recommended that purchase orders include information about completing the consumer satisfaction survey.

PRIOR AUTHORIZATION

- Numerous concerns regarding prior authorizations were shared including adding it to the plan after the service was provided and listing the PO start date after the service was provided. CCP is sending these back for an exception request. If consumer has started a service, we can pay for a service starting the date the PO was authorized.
- Staff can be held personally responsible for paying for items not on the plan and for which they have agreed to pay.

GUARDIANSHIP DOCUMENTATION REQUIREMENT

- Effective April 1st DVR will require guardianship (person and estate) documentation prior to accepting an application for DVR services.
- If an application signed by the guardian is received without the guardianship documentation on file, the application will not be processed until the guardianship documentation is received.
- The application date is the date when both the signed application and guardianship documentation have been received.
- Updated information regarding guardianship documentation will be included in the updated policy manual available on April 1.

VRC CHANGE DISCUSSION

- Recently most requests to change counselors seem to be denied.
- If the change of counselor request is denied, the consumer has the ability to request an appeal and should be provided their appeal rights. A reason should also be provided when the counselor change is denied.
- When consumers want to change counselors, they are encouraged to discuss their feeling with the counselor, send the counselor an email sharing feelings or request mediation with a supervisor or another counselor. The consumer needs to be able to communicate why they want the counselor change.

VSM #4 SATISFACTION SURVEY RECOMMENDATIONS

- Terri Olson shared that a workgroup completed a Value Stream Mapping (VSM) of the consumer satisfaction survey because it was resulting in delayed payments to vendors. In most cases, it was because of not being able to contact the consumer.
- It was proposed to separate receiving on a purchase order from the consumer satisfaction survey.
- It is easy to separate the two in IRIS.
- The goal is to implement the separation of the two for statewide services in October after training has taken place. One week would be allowed to contact consumer. If they couldn't be contacted within a week, receiving could be completed because of inability to contact. Additional attempts would be made to complete the satisfaction survey after receiving was completed.
- The goal is to get more information from consumers regarding the service. Activity codes could be used to differentiate the questions asked of the consumer. All 4 satisfaction survey questions would be asked for statewide services. A flashing alert in IRIS would also identify consumers who need to have receiving or a satisfaction survey completed.
- A new dashboard report showing the survey results for vendors is also being developed along with a report card so consumers can review the results of the consumer satisfaction surveys.
- Policy Academy will review the final process before it is implemented.
- Comprehensive fiscal training will become part of the new employee training.

ADDITIONAL ITEMS

- Consumers have the right to record conversations with counselors without informing them or without their permission. Recording cannot affect services and are not admissible in court.
- It was reiterated that it is challenging to find all of the information in reports to verify that the Tech Specs are being met. A new standard report would make it easier to find the required elements of the Tech Specs. Service Providers can use their own form as long as it contains the required Tech Spec information.

CHECK OUT

- There was consensus that everyone enjoyed the taco bar lunch and that the meeting was informative and productive.

THE NEXT MEETING IS TUESDAY, MAY 13, VIA THE AV SITES.