

# UWIN Work Group Minutes

Work Group : EXECUTIVE BOARD

Meeting Date: December 13, 2001

Facilitator: Cathy Chambless

Minute Recorder: Hank Liese

Attendees: Mike Richardson, Marie Christman, Lynne MacLeod, Hank Liese, George Julnes, Blaine Petersen, Bill Young, Cathy Chambless, Tamara Keene, Kathy Daley, Phil Eimers, Matt Knotts, Linda Asa, Catherine Carter

## Next Meeting Date and Location

Thursday, March 14, 2002, 8:30 a.m., Rehabilitation Service Center, 1595 West 500 South, South Conference Room

## Action Item Updates from Past Meetings

<i>Action Item</i>	<i>Status</i>	<i>Who</i>
Reviewed minutes from Executive Board meetings on October 25, 2001 and November 19, 2001	Accepted as written.	Board members

## Discussions for Future Meetings



## Topic and Summary of Discussion

Election of chair for UWIC Executive Board. Cathy Chambless reported that Mike Deily had agreed to serve as Chair of the Executive Board for a one-year period. The Chair will assist in preparing the agenda for meetings.

### **GRANT OVERSIGHT AND EVALUATION (GOE) WORKGROUP:**

PAR Update. Cathy noted that the PAR process has been working well. The issues on the Executive Board agenda arise from the various workgroups. The workgroups report to the GOE Workgroup, which screens issues for, and makes recommendations to, the Executive Board.

Data Collection Issues – Cross-Agency Data System. Bill Young began by reporting that Diane Russell has been assigned to head up the Governor’s Committee on the Employment of People with Disabilities. Diane will be forming an “employer education” workgroup in her new capacity. Regarding data collection, Bill said we are trying to design a system that will be able to tell us how and whether UWIN interventions are achieving desired outcomes (e.g., independence, employment for people with disabilities). For example, we would like to be able to answer questions such as, “Did a person who utilized the Buy-In benefit from any of the other UWIN interventions?”

Bill noted that our data collection will involve obtaining informed consent from consumers. Different agencies whose data we will draw upon have different policies on informed consent, and there are federal informed consent guidelines to consider as well. Bill will schedule a meeting with the appropriate agencies, and their attorneys, to review informed consent procedures and come to some consensus on how to proceed. Bill said some issues to consider are (1) we already have consumers in some of our UWIN programs without informed consent and (2) our asking for informed consent will mean some consumers will elect not to participate, e.g., in the Benefits Planning Assistance & Outreach (BPA&O) program, as they will be concerned about where the information they share will end up. Marie Christman suggested that Bill contact Janetha Hancock regarding the informed consent meeting. It was noted that the F.A.C.T. program had to go through this whole informed consent process, all the way up to the Attorney General’s office. Marie suggested we call Terri Johnson in Human Services for input on how F.A.C.T. navigated the process. Perhaps Terri can save us a lot of time and energy on this. Depending on what Bill finds out from these contacts, it may not even be necessary to call an agency-wide meeting on informed consent. Bill wondered what we might need from Social Security in the area of informed consent. Phil Eimers said we probably need to interface with Maximus, our national contractor, on this. Bill Young will follow up with a Maximus contact he has.

### **WORK INCENTIVES WORKGROUP:**

Medicaid Work Incentives (Buy-In) Update. Linda Asa reported on the number of “enrolled” consumers. At the end of July, 57 clients were participating in the Buy-In; at the end of August, 107 clients were participating; at the end of September, 108 clients; at the end of October, 118; and at the end of November, 156. Most are paying the Buy-In premium (i.e., incomes are above 100% of poverty). Blaine Petersen asked how consumers were learning about the program. Linda said through the *Clientel* newsletter; also, Valley Mental Health is pushing it. Blaine said that VR staff should be pushing it more as well.

Benefits Planning Standards Follow-Up. Cathy noted that we are trying to make progress on this issue. The “missing piece” is the involvement of mental health agencies. Cathy and Kathy Daley met with Jack Tanner of the Utah Behavioral Health Network (UBHN) to raise the issue. They will next present to the UBHN directors in January, 2002. We are looking at getting a UBHN representative on the Executive Board or GOE Workgroup. Kathy said it is critical that thorough and accurate information on benefits be disseminated, or it would mean the downfall of our BPA&O program. Hence the need for benefits planning standards to be in place.

BPA&O Update. Kathy said the program is working well. They are seeing 3-5 new DDS referrals per month, and 3-5 referrals per week from other sources. They are working with approximately 87 DDS referrals currently, and approximately 40 consumers are receiving BPA&O services. Over 400 outreaches have been documented. Kathy said 8 individuals have either obtained employment or are maintaining employment due to BPA&O interventions.

### **OUTREACH AND TRAINING WORKGROUP:**

Quality Control Process for Publications Across Agencies, Programs. This issue arose out of the Work Incentives Workgroup, then went to the GOE Workgroup. Currently, there is no coordination on the UWIN information that different agencies are putting out. We have to ensure we are disseminating a clear, consistent message on our programs. It would be a good idea to include the UWIN website at all times. It would be nice if the information being put out had a consistent “look” to it as well, i.e., graphics. Cathy said the UWIN grant has money for a media consultant. Perhaps we can use those funds to hire a graphic designer to help us develop a coordinated message and “look.” It was decided that brochures and other UWIN dissemination pieces could “pass through” the Outreach and Training Workgroup for quality control purposes.

Protection and Advocacy for Beneficiaries of Social Security (PABSS) Update. Matt Knotts said that his agency has received 9 calls so far asking for information on work incentives. There have been no complaints. Of the 9 callers, 7 had a mental health diagnosis. Outreach efforts include brochures and postcards, which are also available in Spanish. They have done some targeted outreach in the northern part of the state, e.g., Logan. There will be a national P&A training in January where Matt hopes to learn what they’re supposed to be doing. They have a PSA ready to go, but they will hold off on this until they see if they can add something to the PSA on UWIN.

### **EMPLOYMENT SUPPORTS:**

Employment-Related Personal Assistance Services Flow Chart. This workgroup is going “great guns.” There are consumers from mental health missing from the workgroup, but there is ongoing outreach to these individuals. Cathy explained that, with personal assistance services (PAS), we chose not to go with a waiver, but rather with a state plan service, which means that the PAS program has to be statewide and, further, you cannot have a waiting list. Cathy then reviewed the flow chart in some detail and discussed progress to date on the MDS-HC screening tool. It is hoped this will be able to substitute for a physician “sign off” around PAS. The hope is to certify people around the state to administer the MDS-HC. Case managers will be needed to help consumers pull everything together, especially the assessments that follow the MDS-CH (see Flow Chart). Currently, this case manager position does not exist in the system. One possibility would be to pay for it out of Medicaid targeted case management. The hope, eventually, is to get to a consumer-directed model. Cathy explained that a person has to be employed, or have the promise of employment, in order to receive PAS. Per federal guidelines, individuals receiving PAS have to work a minimum of 40 hours per month.

### **CHOOSE TO WORK:**

Bill noted that Choose To Work Co-Director Jim Hilton had resigned at the end of October. Donna Sato has been appointed through DWS as the new Choose To Work liaison. Bill said the University of Utah's process evaluation was showing that Choose To Work was not being implemented entirely as it was designed, i.e., according to "program theory." There will be a Choose To Work retreat on January 23-24, 2002, to review the findings on the process evaluation and discuss how Choose To Work might be modified.

#### **INFRASTRUCTURE GRANT MEETING – BALTIMORE, MD, DECMEBER 3-6:**

Bill, Cathy, Nonie Lancaster, and Lynne MacLeod attended the Baltimore grant meeting and participated on two panels. Cathy said that, in terms of coordination/management, UWIN is a model program. Cathy had hoped to talk to other states about their PAS programs, but the states with good programs weren't in attendance. She said that they learned how *not* to do PAS; many states have no way of knowing whether their PAS clients are going to work. Bill observed that this will be the decade of "partnershiping," and Utah is doing a good job here. He said it will be important to have consumer involvement in policy development from the outset. Finally, he said our evaluators are "more fun" than Medicaid evaluators.



**Topic and Summary of Discussion**

**Action Steps**

<i>Action Item</i>	<i>Responsible</i>	<i>Target Date</i>
Contact Janetha Hancock, Terri Johnson, and Maximus for input on informed consent. Based on input from these sources, determine if an agency-wide meeting to discuss informed consent is warranted.	Bill Young	ASAP

**Recommendations for GOE Group**