

Work Plan Table Template

**Please replace the number of months with an actual date.*

Category	Major Objective / Interim Tasks	Due Date (from time of Work Plan submission)*	Lead Person	Status of Task	Deliverables
General NWD/SEP Structure	All individuals receive standardized information and experience the same eligibility determination and enrollment processes.				
	<ul style="list-style-type: none"> Develop standardized informational materials that NWD/SEPs provide to individuals 	September 2013	Kristi Plotner, Aging and Adult Services	Not Started	Informational materials
	<ul style="list-style-type: none"> Train all participating agencies/staff on eligibility determination and enrollment processes 	November/ December 2013	Kristi Plotner	Not Started	Training agenda and schedule
	A single eligibility coordinator, "case management system," or otherwise coordinated process guides the individual through the entire functional and financial eligibility determination process. Functional and financial assessment data or results are accessible to NWD/SEP staff so that eligibility determination and access to services can occur in a timely fashion. <i>(The timing below corresponds to a system with an automated Level I screen, an automated Level II assessment and an automated case management system. NWD/SEP systems based on paper processes should require less time.)</i>				
	<ul style="list-style-type: none"> Design system (initial overview) 	November 2012	Kristi Plotner	Completed	Description of the system
	<ul style="list-style-type: none"> Design system (final detailed design) 	August/September 2013	Kristi Plotner	Not started	Detailed technical specifications of system
	<ul style="list-style-type: none"> Select vendor (if automated) 	August 2013	Kristi Plotner	In progress	Vendor name and qualifications
	<ul style="list-style-type: none"> Implement and test system 	August- December 2013	Kristi Plotner, Vendor	Not started	Description of pilot roll-out
	<ul style="list-style-type: none"> System goes live 	January 2014	Kristi Plotner, Vendor	Not started	Memo indicating system is fully operational
	<ul style="list-style-type: none"> System updates 	Semiannual	Kristi Plotner, Vendor	Not started	Description of successes and challenges
NW D/S EP	State has a network of NWD/SEPs and an Operating Agency; the Medicaid Agency is the Oversight Agency.				
	<ul style="list-style-type: none"> Identify the Operating Agency 	November 2012	Kristi Plotner	Completed	MS Division of Medicaid will be

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					the operating agency as well as the oversight agency
	<ul style="list-style-type: none"> Identify the NWD/SEPs 	July 2013	Kristi Plotner	Complete	List of NWDS
	<ul style="list-style-type: none"> Develop and implement a Memorandum of Understanding (MOU) across agencies 	May 2013	Kristi Plotner	In process, due May 1 2013	Signed MOU
NWD/SEPs have access points where individuals can inquire about community LTSS and receive comprehensive information, eligibility determinations, community LTSS program options counseling, and enrollment assistance.					
	<ul style="list-style-type: none"> Identify service shed coverage of all NWD/SEPs 	July 2013	Kristi Plotner, Aging and Adult Services	In process	Percentage of State population covered by NWD/SEPs
	<ul style="list-style-type: none"> Ensure NWD/SEPs are accessible to older adults and individuals with disabilities 	November 2013	Kristi Plotner, Aging and Adult Services	Not started	Description of NWD/SEP features that promote accessibility
Website	The NWD/SEP system includes an informative community LTSS website; Website lists 1-800 number for NWD/SEP system.				
	<ul style="list-style-type: none"> Identify or develop URL 	May 2013	Kristi Plotner, Carleton Smith	In Process	URL
	<ul style="list-style-type: none"> Develop and incorporate content 	May 2013	Kristi Plotner, Carleton Smith	In Process	Working URL with content completed, screen shots of main pages
	<ul style="list-style-type: none"> Incorporate the Level I screen (<i>recommended, not required</i>) 	May 2014	Kristi Plotner, Carleton Smith	In Process	Screen shots of Level I screen and instructions for completion
1-800 Number	Single 1-800 number where individuals can receive information about community LTSS options in the State, request additional information, and schedule appointments at local NWD/SEPs for assessments.				
	<ul style="list-style-type: none"> Contract 1-800 number service 	May 2013	Kristi Plotner, Aging and Adult Services	In progress	Phone number

Category	Major Objective / Interim Tasks	Due Date (from time of Work Plan submission)*	Lead Person	Status of Task	Deliverables
	<ul style="list-style-type: none"> Train staff on answering phones, providing information, and conducting the Level I screen 	August 2013	Kristi Plotner, Aging and Adult Services	Not started	Training materials
Advertising	State advertises the NWD/SEP system to help establish it as the "go to system" for community LTSS				
	<ul style="list-style-type: none"> Develop advertising plan 	October 2013	Kristi Plotner, Aging and Adult Services	Not started	Advertising plan
	<ul style="list-style-type: none"> Implement advertising plan 	December 2013	Kristi Plotner, Aging and Adult Services	Not started	Materials associated with advertising plan
CSA/CDS	A CSA, which supports the purposes of determining eligibility, identifying support needs and informing service planning, is used across the State and across a given population. The assessment is completed in person, with the assistance of a qualified professional. The CSA must capture the CDS (required domains and topics).				
	<ul style="list-style-type: none"> Develop questions for the Level I screen 	January 2014	Kristi Plotner	In progress	Level I screening questions
	<ul style="list-style-type: none"> Fill out CDS crosswalk (see Appendix H) to determine if your State's current assessments include required domains and topics 	November 2012	Kristi Plotner	Completed	Completed crosswalk(s)
	<ul style="list-style-type: none"> Incorporate additional domains and topics if necessary (<i>stakeholder involvement is highly recommended</i>) 	January 2014	Kristi Plotner	In progress	Final Level II assessment(s); notes from meetings involving stakeholder input
	<ul style="list-style-type: none"> Train staff members at NWD/SEPs to coordinate the CSA 	November 2013	Kristi Plotner	Not started	Training materials
	<ul style="list-style-type: none"> Identify qualified personnel to conduct the CSA 	November 2013	Kristi Plotner	Not started	List of entities contracted to conduct the various components of the CSA
	<ul style="list-style-type: none"> Continual updates 	Semiannual	Kristi Plotner	Not started	Description of success and challenges
Conflict-Free	States must establish conflict of interest standards for the Level I screen the Level II assessment and plan of care processes. An individual's plan of care must be created independently from the availability of funding to provide services.				

Category	Major Objective / Interim Tasks	Due Date (from time of Work Plan submission)*	Lead Person	Status of Task	Deliverables
	<ul style="list-style-type: none"> Describe current case management system, including conflict-free policies and areas of potential conflict 	November 2012	Kristi Plotner	Completed	Description of pros and cons of case management system
	<ul style="list-style-type: none"> Establish protocol for removing conflict of interest 	December 2013	Kristi Plotner	In progress	Protocol; if conflict cannot be removed entirely, explain why and describe mitigation strategies
Data Collection and Reporting	States must report service, outcome, and quality measure data to CMS in an accurate and timely manner.				
	<ul style="list-style-type: none"> Identify data collection protocol for <i>service data</i> 	August 2013	Kristi Plotner	In progress	Measures, data collection instruments and protocol
	<ul style="list-style-type: none"> Identify data collection protocol for <i>quality data</i> 	August 2013	Kristi Plotner	In progress	Measures, data collection instruments and protocol
	<ul style="list-style-type: none"> Identify data collection protocol for <i>outcome measures</i> 	August 2013	Kristi Plotner	In progress	Measures, data collection instruments, and protocol
	<ul style="list-style-type: none"> Report updates to data collection protocol and instances of <i>service data</i> collection 	Semiannual**	Kristi Plotner	Not started	Document describing when data was collected during previous 6-month period and updates to protocol
	<ul style="list-style-type: none"> Report updates to data collection protocol and instances of <i>quality data</i> collection 	Semiannual**	Kristi Plotner	Not started	Document describing when data was collected during previous 6-month period and updates to protocol
	<ul style="list-style-type: none"> Report updates to data collection protocol and instances of <i>outcomes measures</i> collection 	Semiannual**	Kristi Plotner	Not started	Document describing when data was collected during previous 6-month period and updates to protocol
Sustain ability	States should identify funding sources that will allow them to build and maintain the required structural changes.				
	<ul style="list-style-type: none"> Identify funding sources to implement the structural changes 	November 2012	Kristi Plotner	Completed	Description of funding sources

Category	Major Objective / Interim Tasks	Due Date (from time of Work Plan submission)*	Lead Person	Status of Task	Deliverables
	<ul style="list-style-type: none"> Develop sustainability plan 	December 2013	Kristi Plotner	In progress	Estimated annual budget to maintain the structural changes and funding sources
Exchange IT Coordination	States must make an effort to coordinate their NWD/SEP system with the Health Information Exchange IT system.				
	<ul style="list-style-type: none"> Describe plans to coordinate the NWD/SEP system with the Health Information Exchange IT system 	October 2013	Kristi Plotner	On hold	Description of plan of coordination
	<ul style="list-style-type: none"> Provide updates on coordination, including the technological infrastructure 	Semiannual	Kristi Plotner	On hold	Description of coordination efforts

*** If States do not submit satisfactory information regarding data collection protocol, they will be required to submit this information on a quarterly basis.*

Signature of Lead of Operating Agency

Signature of Lead of Oversight Agency (Medicaid)

Name:
Agency:
Position:

Name:
Agency:
Position:

Descriptions of Deliverables and Companion Text

In addition to completing the Work Plan Table Template, the State must provide companion text for each task. In prose, bullets, or numbered lists, this companion text should make clear what the State's plans are for completing each task and corresponding deliverable. Specifically, the State should describe the current state of the task, experienced or anticipated challenges to completing this task, and the State's plans to address these challenges. This information will also be used to populate the first in a series of online Programmatic Progress Reports, which will save the State time as it prepares its quarterly reports (see Chapter 7 of the Manual). The level of detail in the companion text may depend on the task and its due date. Specifically, at the time of Work Plan development, a State may have less information regarding tasks it expects to submit further in the future than for those due nearer in time. States will have the opportunity to update the companion text with more detail through their quarterly Progress Reports and as they make progress on the structural changes. The State need not remark on tasks that are already completed.

1. All individuals receive standardized information and experience the same eligibility determination and enrollment processes.

- 1.1. *Develop standardized informational materials that NWD/SEPs provide to individuals:* Informational materials can include pamphlets, summaries of programs and related eligibility criteria, and case worker scripts. States may already have developed these materials and distributed them to individuals seeking community LTSS.

<p>Describe the current status of this task:</p> <p>Appropriate informational materials are currently being discussed and identified. Based on vendor presentations, research of other systems, and surveys with local providers and participants in our MFP project, NWD standardized informational materials will be identified.</p> <p>Eligibility criteria for each waiver, service, and program are established.</p> <p>Case worker scripts will not be developed or implemented until a successful vendor for the state-wide, web-based information and tracking system and accompanying MAC centers are selected.</p>
<p>Describe experienced or anticipated challenges to completing this task:</p> <p>Anticipated challenges include keeping up with changing eligibility criteria, available services, and appropriate providers; ensuring a consistent message/response is provided by all intake personnel; and sustaining the NWD system after BIP funding is exhausted.</p>
<p>Describe the State's plan to address the challenges described above:</p> <p>Care will be taken with the design of the system for updates and specifically with the ongoing, in-depth training of response personnel for uniformity and accuracy of message. Sustainability planning will begin as the project is initiated to develop a workable solution for continuation, including design of the RFP for system development and implementation, a DOM state plan amendment, and designation of state legislative funding.</p>

- 1.2. *Train all participating agencies/staff on eligibility determination and enrollment processes:* All staff should be trained on these processes by the time the NWD/SEP system is implemented for

testing (18 months after date of Work Plan submission). This timing corresponds to an automated NWD/SEP system; the implementation of a paper-based system should require less time. As a related deliverable, States should submit the training documents used by NWD/SEP staff to follow the NWD/SEP processes, in addition to the training agenda. To be effective, documents should include flow diagrams and clear guidelines for each type of NWD/SEP staff member.

<p>Describe the current status of this task:</p> <p>As identified above, this task will not be implemented until the appropriate system vendor, central call-in staff, MAC center personnel, and other LTSS contact portal staff are all fully and uniformly trained. A collaborative training document will be developed and submitted to CMS prior to the 18-month timeline.</p>
<p>Describe experienced or anticipated challenges to completing this task:</p> <p>Keeping the training ongoing and up to date; turn over of participating NWD personnel; and ensuring that what staff are trained to do and say is being implemented by all in a uniform manner are three of the challenges we anticipate.</p>
<p>Describe the State's plan to address the challenges described above:</p> <p>Establishing buy-in from participating agencies and personnel with the training curricula, manuals, processes, protocols, and guidelines</p> <p>Retaining a training coordinator to oversee and ensure training is being continually performed, updated, and adhered to.</p>

2. A single eligibility coordinator, "case management system," or otherwise coordinated process guides the individual through the entire functional and financial eligibility determination process.

2.1. *Design system (initial overview):* The State should submit with the Work Plan a general description of the NWD/SEP system, including the major actors (i.e., Operating Agency, NWD/SEPs), overview of processes (e.g., flow diagram), and the level of automation expected within the system. For example, States should indicate whether they plan on using an online Level I screen and/or an automated Level II assessment that feeds into a central database, accessible to all NWD/SEPs.

Describe the current status of this task:

Mississippi has decided to use a fully- automated, state-wide, secure, web-based information and tracking system to identify and coordinate functional and financial eligibility in an effort to navigate barriers to accessing LTSS. This system, known as the MS Access to Care (MAC) system, is planned to contain an interactive Level I screening that populated the Level II assessment instruments to streamline and improve data collection and assessment.

The Division of Medicaid will be the oversight **and** operating agency. The MS Department of Human Services, through an ADRC grant from CMS, will be a partner agency in implementing a network of physical access points for information coordination and service delivery. These locations, to be known as MAC Centers, will be geographically dispersed throughout the state and comprised of a mix of planning and development districts, community mental health centers, Department of Rehabilitation sites, and providers, as well as through any one of the 29 regional Medicaid offices. Regardless of how an individual initially accesses the system, once their financial and functional eligibility determination is made and a plan of care developed, the individual is connected with the most appropriate MAC center to initiate and coordinate access to and delivery of identified HCB services and supports.

To truly be reflective of a single entry point system, Mississippi's MAC system will seek to connect with the State's developing insurance exchange.

Finally, the Division has received a supplemental grant to support identification and access to safe, affordable, appropriate housing. We plan to issue a RFP for a web-based housing locator service to assist individuals with locating and accessing community housing options. This housing locator service will be connected to and implemented through the MAC system as well.

Presentations from interested vendors are currently being made to appropriate DOM staff on scope, design, and options of services.

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

2.2. *Design system (final detailed design)*: This second task involves a much more detailed design structure of the NWD/SEP system. If the State plans to contract a vendor to build an automated system, the deliverable associated with this task could be a Request for Proposals (RFP) disseminated to potential vendors. The RFP should include the data flow, highlighting which entity(ies) will house the data, data transfer mechanisms, levels of user access, and data security measures. If the NWD/SEP system is paper-based, the description should include how information will be transferred to different participating entities in a timely manner (e.g. phone, fax) and how non-electronic data will be stored and retrieved securely.

<p>Describe the current status of this task:</p> <p>Mississippi plans to retain a vendor to design, develop, house and operate the NWD system, with a trained staff to respond to calls to the 800 number and respond to the system's website questions and issues. The Division is hosting several presentations by possible vendors with experience developing similar systems. From these sessions, the Division will be able to identify the design the size, scope, function, and operation of the system.</p> <p>A Request for Proposals (RFP) will be developed identifying the NWD system the Division wants. The most appropriate and cost-effective vendor responding to the RFP will be selected during the third quarter of 2013.</p>
<p>Describe experienced or anticipated challenges to completing this task:</p> <p>Drafting a thorough RFP that is sufficiently informative and gets the desired results at the desired price.</p>
<p>Describe the State's plan to address the challenges described above:</p> <p>Retaining a contractor with experience drafting RFPs for DOM who leads a collaborative effort developing the RFP, reviewing responses, and selecting the best endor.</p>

2.3. *Select vendor (if automated)*: Once a vendor is selected to build or enhance the NWD/SEP system, the State should submit a memo indicating the vendor name and qualifications (i.e., reason for selection).

<p>Describe the current status of this task:</p> <p>N/A</p>
<p>Describe experienced or anticipated challenges to completing this task:</p> <p>No challenges anticipated.</p>
<p>Describe the State's plan to address the challenges described above:</p>

2.4. *Implement and test system*: We expect many States will gradually roll out the NWD/SEP system, incorporating NWD/SEPs one at a time or in groups. This will allow States to test processes, identify lessons learned, and make improvements. This task requires a description of the roll-out plan, including which entities will implement the system when, and protocols for evaluating processes and incorporating lessons learned.

Describe the current status of this task: N/A Some of this will be determined and identified in the vendor responses to the RFP.
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

2.5. *System goes live:* Once the system is live or fully operational, States should submit a memo to CMS indicating that it is fully operational and describe any major system changes implemented since the detailed design.

Describe the current status of this task: N/A
Describe experienced or anticipated challenges to completing this task: No challenges anticipated.
Describe the State's plan to address the challenges described above:

2.6. *System updates:* After the system goes live, States should submit a brief semiannual report describing the successes and challenges associated with the system.

Describe the current status of this task: N/A
Describe experienced or anticipated challenges to completing this task: No challenges anticipated.
Describe the State's plan to address the challenges described above:

3. **State has a network of NWD/SEPs and an Operating Agency; the Medicaid Agency is the Oversight Agency.**

3.1. *Identify the Operating Agency:* The name of this agency should be included in the initial description of the NWD/SEP system.

Describe the current status of this task: The operating agency is the Division of Medicaid. The MS Department of Human Services will be a partner with the operation and oversight of the MAC centers.
Describe experienced or anticipated challenges to completing this task: None identified
Describe the State's plan to address the challenges described above:

3.2. *Identify the NWD/SEPs:* The names of the entities and their locations should be included in the initial description of the NWD/SEP system.

Describe the current status of this task: Described earlier in 1.1. The entities are not yet identified.
Describe experienced or anticipated challenges to completing this task: No major challenges are anticipated.
Describe the State's plan to address the challenges described above:

3.3. *Develop and implement a Memorandum of Understanding (MOU) across agencies, including the State Medicaid Agency and the Operating Agency:* Given that many agencies will be involved in the NWD/SEP system, it is essential that each agency has a clear role and is on board with completing its responsibilities. MOUs are a key resource in helping define tasks and develop or solidify support. An example MOU is located in [Appendix F](#) in the Manual.

Describe the current status of this task: A MOU will be developed between DOM and MDHS, the partner agency once the BIP work plan is approved and the ADRC supplemental grant is awarded. (Even if not awarded, DOM plans to proceed with MDHS as a NWD partner)

Describe experienced or anticipated challenges to completing this task: None anticipated
Describe the State's plan to address the challenges described above:

4. NWD/SEPs have access points where individuals can inquire about community LTSS and receive comprehensive information, eligibility determinations, community LTSS program options counseling, and enrollment assistance.

4.1. Identify service shed coverage of all NWD/SEPs: As previously noted, a NWD/SEP's service shed covers all residents within a certain distance. Ideally, the combined service sheds of all NWD/SEPs should cover the State's entire population. Because this is not always feasible, States should submit the percentage of the State's population actually covered by the NWD/SEP and a description of why 100 percent coverage is not feasible.

Describe the current status of this task: It is expected that 100% of those seeking assistance in the state will be within a "reasonable" driving distance to a NWD access point/MAC Center. The specific number and location of access points will be determined through a selection process jointly led by DOM and MDHS and including other agencies and providers.
Describe experienced or anticipated challenges to completing this task: A primary challenge will be determining the best and most appropriate mix of type, location, capacity, and buy-in of would-be MAC Centers, and ensuring that everyone has reasonable access to the NWD system.
Describe the State's plan to address the challenges described above: The described challenge will be addressed through the process identified in the status section above and through ongoing process evaluation/CQI of the program.

4.2. Ensure NWD/SEPs are accessible to older adults and individuals with disabilities: States should indicate the features of the NWD/SEPs that promote accessibility, including wheelchair ramps, proximity to public transportation, bilingual staff, etc.

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<p>Describe the current status of this task:</p> <p>In that the NWD access point centers have not been selected yet, it is difficult to assess the current status of each facility. However, it will be required of each selected MAC center to be fully accessible to individuals with disabilities.</p>
<p>Describe experienced or anticipated challenges to completing this task:</p> <p>No challenge anticipated with ensuring handicap accessibility. Proximity to public transit may be an issue in that we have very little public transit in much of the state. Transportation issues, as a whole, for individuals seeking assistance will be addressed.</p>
<p>Describe the State's plan to address the challenges described above:</p> <p>In process</p>

5. The NWD/SEP system includes an informative community LTSS website; Website lists 1-800 number for NWD/SEP network.

5.1. Identify or develop URL: Many States already have websites with information on community LTSS. If the State plans to use a website already in existence, it should submit the URL of that website.

<p>Describe the current status of this task:</p> <p>There is an existing website for the two ADRCs in the state. We are currently in discussion with MDHS (oversight agency for ADRCs) regarding the existing website and toll-free number and as to whether it is best to keep these and expand/enhance/promote the current site and number or whether to scrap those (given a somewhat sketchy history) and develop a new site and new number. MDHS is willing and open to both options.</p>
<p>Describe experienced or anticipated challenges to completing this task:</p> <p>Once the decision identified above is made, the primary challenges will be the renaming (away from ADRC) to MAC Centers, keeping the site updated, and significantly increasing public awareness of the site, number, locations, functions, and services of the NWD system.</p>
<p>Describe the State's plan to address the challenges described above:</p> <p>Steps are already underway to smooth the renaming process. DOM plans to retain a professional to help develop, coordinate and implement a marketing/PR plan for broadly exposing awareness of and access to the new NWD system.</p>

5.2. *Develop and incorporate content:* The State should incorporate additional information into its website as necessary. Once the website is completed, the State should submit the URL for CMS to review.

Describe the current status of this task: DOM will submit the URL for our website once name and content are determined.
Describe experienced or anticipated challenges to completing this task: None anticipated.
Describe the State's plan to address the challenges described above:

5.3. *Incorporate the Level I screen into the website (recommended, not required):* If the State chooses to incorporate a Level I screening tool into its community LTSS website, it should submit the working URL of the tool, in addition to the instructions for users to complete the screen.

Describe the current status of this task: It is currently the plan for the Level I screening tool to be incorporated into the website. The successful vendor described previously will be responsible for the implementation of this task, in response to the RFP issued by DOM. The state will submit the working URL for the tool once in place and operational.
Describe experienced or anticipated challenges to completing this task: Unclear to the state at this time.
Describe the State's plan to address the challenges described above:

6. Single 1-800 number where individuals can receive information about community LTSS options in the State, request additional information, and schedule appointments at local NWD/SEPs for assessments.

6.1. *Contract 1-800 number services:* Many States already have 1-800 numbers for providing information on community LTSS. If the State plans to use a number already in existence, it should submit that phone number. If not, it must describe its method for developing or contracting a 1-800 number service and indicate when the number is functioning.

Describe the current status of this task: Same as 5.1 and 5.2 above
Describe experienced or anticipated challenges to completing this task: Same as 5.1 and 5.2 above
Describe the State's plan to address the challenges described above: Same as 5.1 and 5.2 above

6.2. *Train staff to answer phones, provide information, and conduct the Level I screen:* NWD/SEP staff must be trained on how to provide information and conduct assessments in a standardized fashion. The State should submit related training materials and schedules.

Describe the current status of this task: Training curricula has not been determined yet and training will not begin until after the NWD system vendor is selected, MAC centers identified, and staff hired.
Describe experienced or anticipated challenges to completing this task: Unknown at this time, but no major challenges anticipated.
Describe the State's plan to address the challenges described above:

7. State advertises the NWD/SEP system to help establish it as the "go to system" for community LTSS

7.1. *Develop advertising plan:* Nursing homes, hospitals, community-based organizations, medical providers, and other governmental social programs should be aware of and refer clients to the NWD/SEP system. Therefore, the State must develop and submit a plan for advertising the system to all potential referring partners.

Describe the current status of this task: This task is currently being discussed. Once the NWD system vendor is selected and the MOU with MDHS is executed, DOM plans to retain a professional to lead the development, coordination and implementation of a marketing/PR plan for broadly exposing awareness of and access to the new NWD system. A marketing team/task force, comprised of DOM staff, MDHS staff, vendor staff, other associated state agencies and service providers, will be assembled to guide the design, development, roll-out, and evaluation of the marketing/PR plan.
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Describe experienced or anticipated challenges to completing this task: No major challenges anticipated.
Describe the State's plan to address the challenges described above:

7.2. *Implement advertising plan:* To indicate that the advertising plan has been implemented, States should submit related materials, such as posters and pamphlets.

Describe the current status of this task: Once developed and implemented, the state will submit all related materials, texts, commentaries, etc. to CMS.
Describe experienced or anticipated challenges to completing this task: No challenges anticipated with submitting all appropriate marketing materials to CMS.
Describe the State's plan to address the challenges described above:

8. **A CSA, which supports the purposes of determining eligibility, identifying support needs, and informing service planning, is used across the State and across a given population. The assessment is completed in person, with the assistance of a qualified professional. The CSA includes a CDS (a Core Data Set of required domains and topics).**

8.1. *Develop questions for the Level I screen:* The Level I screen should include a series of basic financial and functional questions that indicate whether a person may be eligible for Medicaid-funded community LTSS. States must identify and submit these questions. Many will submit a Level I screen already in use.

Describe the current status of this task: DOM currently has a Level I screening tool (Pre-PAS); however, it is planned to revise the instrument with input from our <i>Assessment Instrument Design</i> Learning Collaborative Work Group (stakeholder) and from the successful NWD system vendor.

Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

8.2. *Fill out CDS crosswalk to determine if State's current assessments include required domains and topics:*
Refer to [Appendix H](#) in the Manual for instructions on how to determine if the assessment already in use has all required domains and topics within the CDS. An electronic version of the CDS crosswalk can be found on the Balancing Incentive Program technical assistance website at: <http://www.balancingincentiveprogram.org/resources/crosswalk-between-core-standardized-assessment-csa-and-core-dataset-cds>.

Describe the current status of this task: Crosswalk revised and completed.
Describe experienced or anticipated challenges to completing this task: No challenges identified
Describe the State's plan to address the challenges described above:

8.3. *Incorporate additional domains and topics if necessary (stakeholder involvement is highly recommended):*
Many States already use assessments that include all of the required domains and topics within the CDS. If not, the State should incorporate additional domains and topics using input from stakeholders. For the required deliverable, the State should submit the final assessment in addition to any materials that indicate stakeholder involvement.

Describe the current status of this task: Again, with the input from the learning collaborative assessment instrument group, the state plans to incorporate all of the required domains and topics within the CDS.
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

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8.4. *Train staff members at NWD/SEPs to coordinate the CSA:* NWD/SEP staff must be trained to initiate and coordinate the collection of Level II assessments. This involves working with the clinical staff responsible for actually conducting the assessment and ensuring the assessment is completed in a timely fashion. Once again, States should submit training materials and schedules associated with this task.

Describe the current status of this task: As discussed earlier, DOM recognizes the necessity for and value of training staff that will be in the NWD system. DOM plans to retain a training coordinator to led and ensure appropriate training is provided to staff, including the collection of Level II assessments. DOM will submit all training materials once developed.
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

8.5. *Identify qualified personnel to administer the CSA:* States should submit a list of entities responsible for conducting the different portions of the assessment in addition to their qualifications, such as certification, education, or training.

Describe the current status of this task: The list of entities that will be administering Level I screenings and Level II assessments have not been identified at this time. Once has been determined, the state will provide this information to CMS.
Describe experienced or anticipated challenges to completing this task: No major challenges are anticipated.
Describe the State's plan to address the challenges described above:

8.6. *Regular updates:* After the implementation of the CSA, States should submit brief semiannual reports with successes and challenges associated with the CSA.

Describe the current status of this task:

Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

9. States must establish conflict of interest standards for the Level I screen, the Level II assessment and, the plan of care processes. An individual's plan of care must be created independently from the availability of funding to provide services.

9.1. Describe current case management system: This description should identify areas of possible conflict in case management and systems the state currently has in place to mitigate those conflicts.

Describe the current status of this task: The state has submitted the conflict-free case management form. However, certain answers were overlooked and incomplete. The form has been revised and will be re-submitted shortly.
Describe experienced or anticipated challenges to completing this task: No challenges are anticipated with completing this task.
Describe the State's plan to address the challenges described above:

9.2. Establish protocol for removing conflict of interest: The state must also describe how it plans to ensure that community LTSS eligibility determination, enrollment, and case management processes are free of conflict of interest.

Describe the current status of this task: The state is currently discussing and developing appropriate responses for this task with the learning collaborative team assigned this topic.
Describe experienced or anticipated challenges to completing this task: One major challenge will be trying to change the way and by whom case management has been performed for years in MS. No major challenges are anticipated with establishing state and provider firewalls.

Describe the State's plan to address the challenges described above:

DOM is awaiting feedback from the learning collaborative, performing research, and having in-house discussions to address the challenge.

10. States must report service, outcome, and quality measure data to CMS in an accurate and timely manner.

*10.1. Identify data collection protocol for **service data**:* States should submit the sources for these data and/or the surveys that will be used to collect these data. As applicable, information should also include sampling and data collection protocols.

Describe the current status of this task:

We are working with Mission Analytics on the development of the data collection protocol for service data. Also, we are working on the development of a data collection plan with the learning collaborative team (stakeholders), internally, and others that may result in an RFP for evaluation design and implementation or some other procurement or outsourcing process.

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

*10.2. Identify data collection protocol for **quality data**:* States should submit the sources for these data and/or the surveys that will be used to collect these data. As applicable, information should also include sampling and data collection protocols.

Describe the current status of this task:

We are working with Mission Analytics on the development of the data collection protocol for quality data. Also, we are working on the development of a data collection plan with the learning collaborative team (stakeholders), internally, and others that may result in an RFP for evaluation design and implementation or some other procurement or outsourcing process.

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

10.3. *Identify data collection protocol for **outcome measures***: States should submit the sources for these data and/or the surveys that will be used to collect these data. As applicable, information should also include sampling and data collection protocols.

Describe the current status of this task: We are working with Mission Analytics on the development of the data collection protocol for outcome measures. Also, we are working on the development of a data collection plan with the learning collaborative team (stakeholders), internally, and others that may result in an RFP for evaluation design and implementation or some other procurement or outsourcing process.
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

10.4. *Report updates to data collection protocol and instances of **service data** collection*: On a semiannual basis, States should submit any changes to their protocols for collecting service data, or any new instances of service data collection.

Describe the current status of this task:
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

10.5. *Report updates to data collection protocol and instances of **quality data** collection*: On a semiannual basis, States should submit any changes to their protocols for collecting quality data, or any new instances of quality data collection.

Describe the current status of this task:
Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

10.6. *Report updates to data collection protocol and instances of outcomes measures collection:* On a semiannual basis, States should submit any changes to their protocols for collecting outcomes measures, or any new instances of outcomes measures collection.

Describe the current status of this task:
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

11. States should identify funding sources that will allow them to build and maintain the required structural changes.

11.1. *Identify funding sources to implement the structural changes:* Before building their systems, States must identify the sources of funding they will use to make these changes. States should submit information on the total cost of implementing the structural changes and the amount that each funding source will provide.

Describe the current status of this task: The state plans to use BIP funds, either as match or for the total cost, to pay for each of the identified structural changes. The work plan is being updated to reflect this projection.
Describe experienced or anticipated challenges to completing this task: None identified
Describe the State's plan to address the challenges described above:

11.2. *Develop sustainability plan:* States must also develop clear estimates of the cost to maintain the structural changes once they are in place. Therefore, States should submit the overall maintenance budget of the structural changes and anticipated sources of funding.

Describe the current status of this task:

For the structural changes, our intent is to use the bulk of the funds for design, development, and initial implementation with low ongoing maintenance costs. The identified RFP to be written will incorporate and specify our intent to keep ongoing maintenance expenses at a minimum. Savings from increased efficiencies will be invested in the maintenance of structural changes as well. As DOM gets a better feel for the ongoing maintenance expenses from responding vendors to our RFP, through the work of our learning collaborative, and from our internal operations staff, we will submit a realistic maintenance budget with specified sources of ongoing funding to CMS.
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

11.3 Describe the planned usage for the enhanced funding. The State must identify the projected amount of funding to be earned through the Program and describe how the State will use this enhanced funding by September 30, 2015. The State should also describe how the planned expenditures meet the following criteria: 1. Increase offerings of or access to non-institutional long-term services and supports; 2. Are for the benefit of Medicaid recipients; and 3. Are not a prohibited use of Medicaid funding.

Description	Source	Projected Total Cost	Projected BIP Funds Used	Match rate	Increases Offerings or Access to C-LTSS	Benefits Medicaid Benes	Medicaid Funds Can Typically Be Used
IDDD- \$50M E&D \$7; IL- \$39M; AL- \$2.2M; TBI/SCI- \$1.2M		99,400,000.00	26,410,580.00	73.43	Yes	Yes	Yes
Address rates for services promoting community living		12,500,000.00	3,343,950.00	73.43	Yes	Yes	Yes
Training for direct care staff		2,610,000.00	1,305,000.00	50	Yes	Yes	Yes
Establishing No Wrong Door/Single Entry Point, assisting local ADRC by	BIP Savings	10,000,000.00	5,000,000.00	50	Yes	Yes	Yes
Redesigning tool to be used for all populations and adjusting algorithm	BIP Savings	2,000,000.00	1,000,000.00	50	Yes	Yes	Yes
Consultation for establishing firewalls for conflict free case	BIP Savings	500,000.00	250,000.00	50	Yes	Yes	Yes

management							
Project to transition individuals from IMD in MFP-like program utilizing state funds		500,000.00	500,000.00	0	Yes	Yes	Yes
Allow MYPAC to continue as is until State Plan and/or Congressional bill passed		18,900,000.00	18,900,000.00	0	Yes	Yes	Yes
Implementation of 1915 (i) for IDD individuals not meeting LTC LOC		43,803,000.00	11,638,457.00	73.43	Yes	Yes	Yes
Data Collection	BIP Savings		150,000.00				
			68,497,987.00				

Waiver Waiting List Reduction

Funds will be used to expand waiver services to many of the 16,000 individuals currently on the 5 waiver waiting lists. It is estimated the cost by waiver will be as follows: IDDD - \$50 Million; E&D - \$7 Million; IL - \$39 Million; AL - \$2.2 Million; TBI/SCI - \$1.2 Million.

Increase Provider Capacity

Funds are proposed to be used to address increasing provider capacity and community integration by addressing rates and other factors which prevent the system from moving forward.

Development of College of Direct Supports

Training for direct care workers in all waivers will be addressed by the College of Direct Supports to increase the baseline level of competency for those who provide direct services to individuals.

NWD/SEP Development

Funds will be used for the design, development, and implementation through the BIP Program period of a fully automated, state-wide, secure, web-based information and tracking system to identify and coordinate functional and financial eligibility in an effort to navigate barriers to accessing LTSS. This system, known as the MS Access to Care (MAC) system, is planned to contain both automated and interactive Level I screening and Level II assessment instruments to streamline and improve data collection and assessment. Information from the Level I is proposed to populate to the Level II. Additionally, funds will be used to develop a network of geographically dispersed physical access points for information coordination and service delivery. These access points, known as MAC centers, will be administered by the MS Department of Human Services. Finally, to truly be reflective of a single entry system, Mississippi's MAC system will connect with the state's developing insurance exchange and with a web-based housing locator service. Mississippi will retain a vendor to design, develop, and

operate new NWD system. These are proposed to be developed during the course of this project. The work is pre-procurement at this point.

PAS Enhancements

Funds will be used to redesign level I and level II assessment tools, including algorithm adjustments, for uniformity and coordination for use by all populations through the NWD system.

Conflict Free Case Management

Exploration has to be done in this area to determine steps necessary to attain conflict free case management. Funds proposed for use may include consultation on the topic and agency resources related to addressing policies across agencies that promote conflict free case management.

Demonstration Project

Funds will be used to develop and implement a demonstration project in coordination with the MS State Hospital and a community mental health center to assist long-term patients in the psychiatric hospital with returning to the community. The project, modeled after the state's MFP project, will test the need for an amendment to the State Plan that would allow for providers to bill for pre-transition case management services prior to the individual leaving the facility. Individuals with SMI residing in state psychiatric institutions are excluded from MFP participation because of the requirement that his/her stay include at least one Medicaid paid day. The proposed demonstration project meets the BIP three-part test. It increases access to long-term services and increases offerings of LTSS pre-transition case management. It will benefit Medicaid recipients by greatly improving the rate of successful transitions by enhancing communication and pre-transition planning between the institution and community providers. Finally, we believe that the demonstration is a use that Medicaid can fund in that the individual with SMI would be eligible for Medicaid if not in the state facility. In almost all incidences, they were on Medicaid prior to entering the facility and will almost certainly re-qualify for Medicaid the moment they are discharged to community-based LTSS.

MYPAC Sustainability

Funding will be used to continue to serve youth with SED in the community rather than a PRTF through this previous CA-PRTF (Community Alternatives to Residential Treatment Facilities) demonstration project until State Plan Amendment is approved and/or Congressional bill is passed.

1915(i) for IDD

Funding will be used to implement a 1915 (i) for the IDD population and explore other possible 1915 (i) options that may be of benefit to the State of Mississippi.

12. States must make an effort to coordinate their NWD/SEP system with the Health Information Exchange IT system.

12.1. Describe plans to coordinate systems: This may include discussions with State Exchange IT system staff, the identification of key data fields that should be shared across the systems, and the development of a bridge between the systems.

Describe the current status of this task: DOM desires to coordinate the NWD system with the State Insurance Exchange. We have had two meetings with exchange staff and we plan to include this coordination into the RFP for NWD vendor proposals. Once the vendor is selected, DOM and the vendor will initiate further discussions and cooperative planning with the exchange.
Describe experienced or anticipated challenges to completing this task: There are numerous challenges to completing this task. Some challenges relate to the technology and capacity needed for such system interaction, some relate to the independent nature of the exchange, and some with state politics.
Describe the State's plan to address the challenges described above:

12.2. *Provide updates on coordination:* On a semiannual basis, States should report to CMS updates on coordination including new infrastructure developments.

Describe the current status of this task:
Describe experienced or anticipated challenges to completing this task:
Describe the State's plan to address the challenges described above:

The Work Plan should be signed by the lead of the State Medicaid Agency (the Oversight Agency) and by the Operating Agency (if those two agencies are different).

Signature of Lead of Operating Agency

Signature of Lead of Oversight Agency (Medicaid)

 Name: Kristi R. Plotner, LCSW
 Agency: Division of Medicaid
 Position: Office Director, Policy,
 Planning and Development

 Name: Kristi R. Plotner, LCSW
 Agency: Division of Medicaid
 Position: Office Director, Policy,
 Planning and Development

For technical assistance in completing the Work Plan Table and companion text, you may email: info@balancingincentiveprogram.org.

