

# Rhode Island Conflict-Free Case Management (CFCM) Implementation

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*September Stakeholder  
Meeting*

*September 28, 2023*

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# Agenda

- 1. Introductions**
- 2. CFCM Implementation Updates**
- 3. CFCM Certification Standards**
- 4. Next Steps**
- 5. Answer Stakeholder Questions**

## Meeting Purpose:

1. Share updates on recent implementation changes for the conflict-free case management (CFCM) initiative
2. Answer stakeholder questions

# Introductions

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1. **Moderator:** Jessica Broadus from Guidehouse. Guidehouse is providing technical assistance to RI EOHHS as it implements CFCM.
2. **Speakers for Today's Discussion:**
  - EOHHS: John Bonin, Sophie Asah, Keavin Duffy

# Reminder of Meeting Ground Rules

To support a constructive meeting environment, we have established and ask all attendees to agree to the following ground rules for this and future stakeholder meetings:

1. **This webinar will be recorded.** We are recording this meeting with the intention of posting the webinar recording to the RI EOHHS website. Please be cognizant of sharing any personal information either verbally or in the chat throughout the meeting.
2. **Respect each other:** Help us to collectively uphold respect for each other's experiences and opinions. This includes muting yourself during the presentation!
3. **Respect the time:** Our time together is limited and valuable, so please be mindful of the time and of others' opportunity to participate. We will limit each question and answer to 3 minutes!
4. **Addressing your questions and comments:**
  - a. The presenters will answer your questions during the dedicated Q&A portion of the presentation.
  - b. Please submit your questions or comments in the chat or use the "Raise Hand" feature to indicate you would like to voice a question or comment.
  - c. We will monitor the chat to pull out questions. Please be respectful and focus on the issues.
  - d. If we run out of time for all questions, place your question in the chat. We'll add it to our questions and answers log which will be posted to the RI EOHHS website.

# CFCM Implementation Updates



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# CFCM Timeline

			2023				2024		
#	Category	Activities	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1	Stakeholder	Conduct monthly meetings with all stakeholders							
2	Engagement	Conduct one-on-one meetings with select provider groups to review new processes							
3	Regulations & Requirements	Update existing certification standards and state regulations							
4	CFCM	Post roles and responsibilities comparison							
5	Materials	Create a CFCM policy and procedures manual							
6		Develop CFCM training materials							
7	Certification	Post certification standards for public comment							
8	Process for	Finalize certification standards and application							
9	CFCM	Begin to accept and review CFCM applications							

**Transition Period (Jan.-Jun. 2024):** OHA case management agencies may continue to provide case management services until one of the following event occurs (whichever comes sooner): (1) they become certified as a CFCM entity or (2) their existing certificate under 218-RICR-40-00-5 ends June 30, 2024. EOHHS will discuss this process in more detail via one-on-one meetings with the OHA case management agencies (to be scheduled in October 2023).

## Key Dates

- Oct. 2-31, 2023:** Public comment period of the draft CFCM certification standards.
- By Dec. 31, 2023:** EOHHS posts the final CFCM certification standards, a CFCM application, and a draft CFCM policy and procedure manual.
- January 2024:** CFCM certification process begins.

# New Materials

Document	Description	Posting Date
<a href="#">1. Roles and Responsibilities under CFCM</a>	Detailed comparison of roles and responsibilities under CFCM.	October 2023
<a href="#">2. CFCM Certification Standards</a>	Outlines requirements to become a certified CFCM entity.	October 2, 2023
<a href="#">3. CFCM Application Form</a>	Application to apply to become a CFCM entity.	December 2023
<a href="#">4. CFCM Policy and Procedure Manual</a>	<ol style="list-style-type: none"><li>1. Provides instructions and procedures that case managers need to provide case management.</li><li>2. Example topics include: (1) selection and assignment of a case management entity; (2) sending referrals to providers; (3) prior authorization of services; and (4) annual re-evaluations.</li></ol>	December 2023

# Clarifying Roles

## Medicaid HCBS Participants

1. Drives the person-centered planning process and conversation to the best of their ability.
2. Communicates their desires, hopes, and dreams for their future.
3. Requests changes and approves changes to their person-centered plan.

## State Agency Staff

1. Determine Medicaid eligibility.
2. Explain CFCM and the range of CFCM choices to the participant.
3. For EAD, perform the initial functional needs assessment (InterRAI)
4. For I/DD: (1) continue to perform the initial functional needs assessment (SIS-A) and reassessments at five-year intervals (2) conduct an additional needs questionnaire and interview every year.

## Conflict-Free Case Managers

1. Act as a “navigator” through the HCBS system on behalf of the participant.
2. Support the participant to lead and/or facilitate the person-centered planning process.
3. Facilitates and completes the development of the person-centered plan.
4. Help the participant access services (paid and unpaid) and achieve their identified goals.
5. Conduct regular check-ins with the participant and monitoring progress.
6. For EAD, complete an annual reassessment of functional need (InterRAI).

## Service Providers (Paid & Unpaid)

1. Contributes to the person-centered planning process as requested by the participant.
2. Carries out activities that assist the participant in achieving their goals.



**Detailed Comparison:** In October 2023, RI EOHHS will post a DRAFT detailed roles and responsibility comparison for stakeholder feedback.

## Shared Responsibilities

1. Focus on the participant and what matters most to them.
2. Review and sign the person-centered plan.
3. Maintain documentation in support of claims and the State’s reimbursement requirements.
4. Inform each other of discovered life changes of the participant.



# CFCM Certification Standards

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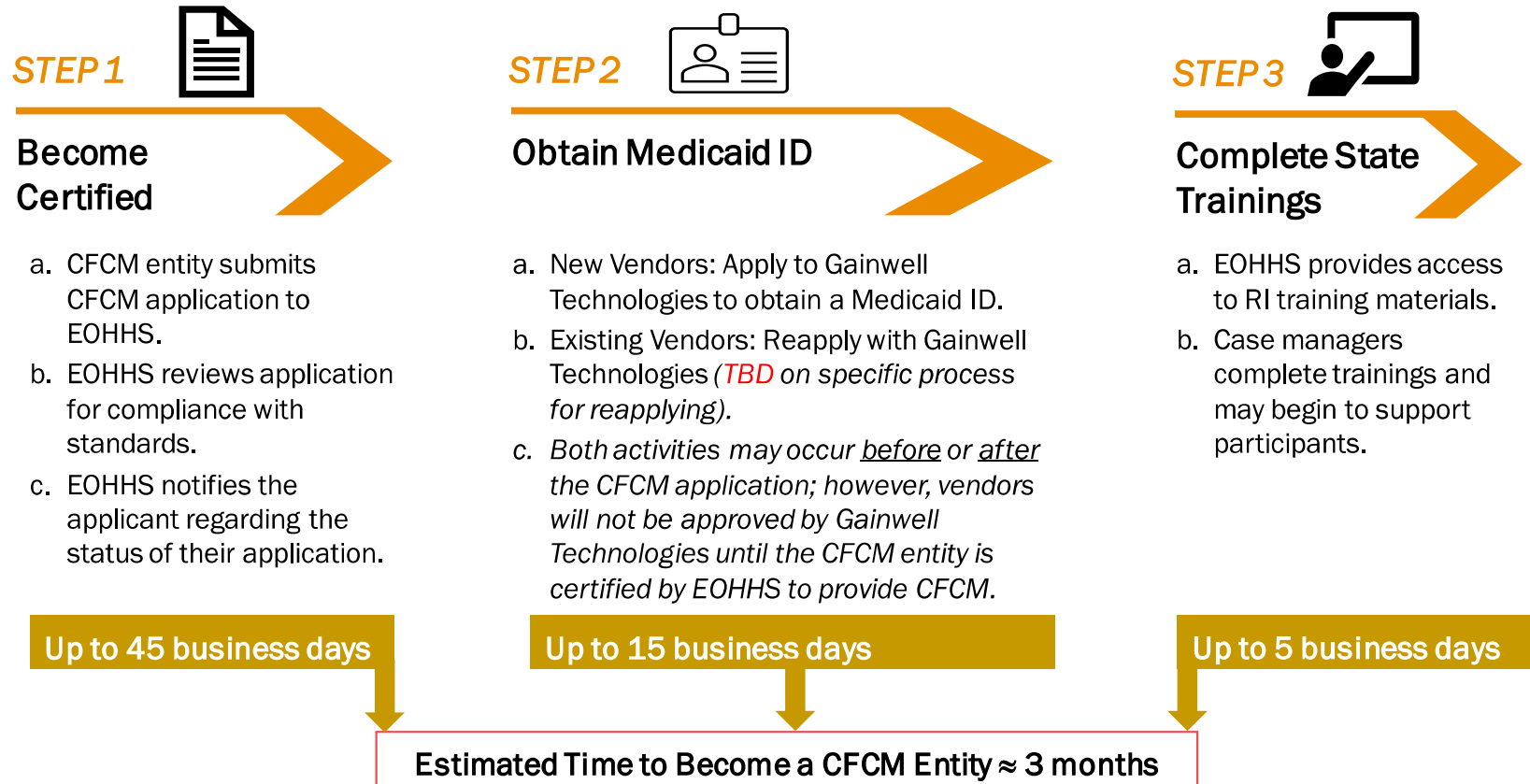
# CFCM Certification Standards



## Key Highlights

1. These standards apply to case management services provided to Medicaid home and community-based services (HCBS) participants, including programs serving participants with intellectual and developmental disabilities (I/DD) and Elders and Adults with Disabilities (EAD).
2. Certification period:
  - a. Initial certification: One (1) year following the initial certification date, unless sooner suspended or revoked.
  - b. Recertification: Two (2) years following the date of renewal, unless sooner suspended or revoked.
3. Business requirements that must be in place before application:
  - a. Policies and procedures
  - b. Physical location
  - c. Plan for staffing and resumes

# Process for Becoming a CFCM Entity



# Next Steps



# Activities in October 2023

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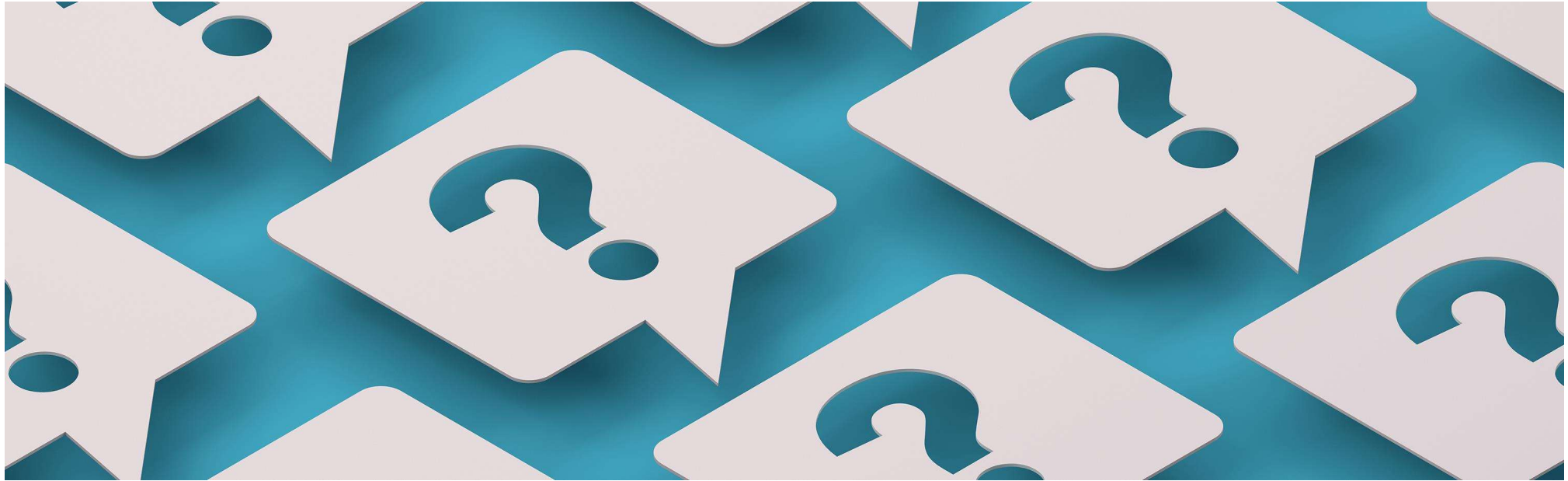
## 1. Certification standards:

- a. On October 2, 2023, RI EOHHS will post a draft of the CFCM certification standards.
- b. October 2-31, 2023 = Public comment period of the draft CFCM certification standards. Stakeholders should submit their feedback to [OHHS.LTSSNWD@ohhs.ri.gov](mailto:OHHS.LTSSNWD@ohhs.ri.gov). Please add “CFCM Certification Standards” to the subject line of your email.

## 2. Monthly stakeholder meeting: Our next monthly stakeholder meeting will happen on October 26, 2023.

## 3. Roles and responsibilities comparison: EOHHS will post a detailed roles and responsibilities comparison for stakeholder feedback. EOHHS will collect feedback via:

- a. One-on-one meetings. Anticipated stakeholder groups includes: 1) OHA case management agencies 2) Participants and families 3) IDD providers.
- b. All stakeholders can continue to submit their feedback to [OHHS.LTSSNWD@ohhs.ri.gov](mailto:OHHS.LTSSNWD@ohhs.ri.gov).



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## Questions?

If you have any questions, please use one of the following options:

1. Chat function
2. Verbally (please use the “raise hand” function in Teams)
3. Email [OHHS.LTSSNWD@ohhs.ri.gov](mailto:OHHS.LTSSNWD@ohhs.ri.gov).