

Rhode Island Conflict-Free Case Management (CFCM) Implementation



November Stakeholder Meeting

November 30, 2023

A photograph of the Rhode Island State Capitol building, featuring a large central dome and classical architectural elements like columns and smaller domes. An American flag is visible on the left side of the building.

Agenda

1. **Introductions**
2. **Status Update**
3. **Recently Posted Documents**
4. **Overview of the Person-Centered Plan**
5. **Overview of the Training Curriculum**
6. **Next Steps**
7. **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

1. **Moderators:** Dustin Schmidt and Jillian Mongetta from Guidehouse. Guidehouse is providing technical assistance to RI EOHHS as it implements CFCM.
2. **Speakers for Today's Discussion:**
 - EOHHS: 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.

Status Update



Implementation Timeline

				2023			2024					
#	Category	Activities	Status	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
1	Stakeholder Engagement	Conduct monthly meetings with all stakeholders	Started									
2		Conduct one-to-one meetings with select provider groups to review new processes	Started									
3	Regulations & Requirements	Update existing certification standards and state regulations	Started									
4	CFCM Materials	Post roles and responsibilities comparison	Complete									
5		Develop a participant transition plan	Started									
6		Create a draft CFCM program manual	Started									
7		Develop CFCM training materials	Started									
8	Certification Process for CFCM	Post Draft certification standards for public comment	Complete									
9		Post the final CFCM certification standards, application, and State responses to public comment	Started									
10		Begin to accept and review CFCM applications	Not started									
11	CFCM Begins	Begin to transition HCBS participants into the CFCM services system	Not started									

Recently Posted Documents

New Documents

All documents are available on the EOHHS CFCM webpage: www.eohhs.ri.gov/conflict-free-case-management

- CFCM Info Session for DD Participants and Families
- Roles and Responsibilities Under CFCM (Draft)
 - Full overview and one-page summary
- Shared Living Roles and Responsibilities Under CFCM (Draft)
- RI Person-Centered Plan Template (Final)

Overview of the Person-Centered Plan



Overview of the Person-Centered Plan

- The person-centered plan is a written document that reflects the services and supports that are important to and for a Medicaid HCBS participant.
- All Medicaid HCBS participants must have a person-centered plan.
- The case manager will work with the Medicaid HCBS participant to develop their person-centered plan.
- RI's final [person-centered plan template](#) is available on the RI EOHHS CFCM webpage.

Person-Centered Plan Template

Example Section from the Person-Centered Plan

Section 1. My Information		
Name:		Date of Birth:
Address:		
Marital Status:		
Living Arrangement:		Living Situation:
Preferred Method of Contact:		Secondary Contact:
Preferred Language:		Communication Accommodations:
Veteran Status:		PACE Enrolled:
Medicaid/Medicare MCO Enrollment:		
Health Home Enrollment:		
Employment Status:		Employment Status Details:
Name of Legal Representative:		Legal Representative Contact Info:
Type of Legal Representation (Guardian, Trustee, etc.) :		
Case Manager Name:		Case Manager Phone #:
Case Management Agency:		
Authorized Representative:		Authorized Rep Contact Info:



Sections of the Person-Centered Plan

Section	What is Included?
Section 1. My Information	General participant information
Section 2. My Person-Centered Planning Meeting and Revisions	Information about meetings with the participant's case manager
Section 3. My Goals	Participant strengths, preferences, and goals
Section 4. My Choices	Participant choices regarding services, self-direction, and living preferences.
Section 5. My Services and Supports	Listing of paid and unpaid supports
Section 6. My Assessed Needs (Risks)	Participant assessed needs and risks
Section 7. My Backup Plan	Supports in the event that the participant's regular supports are not available
Section 8. My Crisis and Safety Plan	Participant action items in case of an emergency
Section 9. Case Management Monitoring	Participant preferences for future case manager meetings
Section 10. Review and Approval	Required signatures

Overview of the CFCM Training

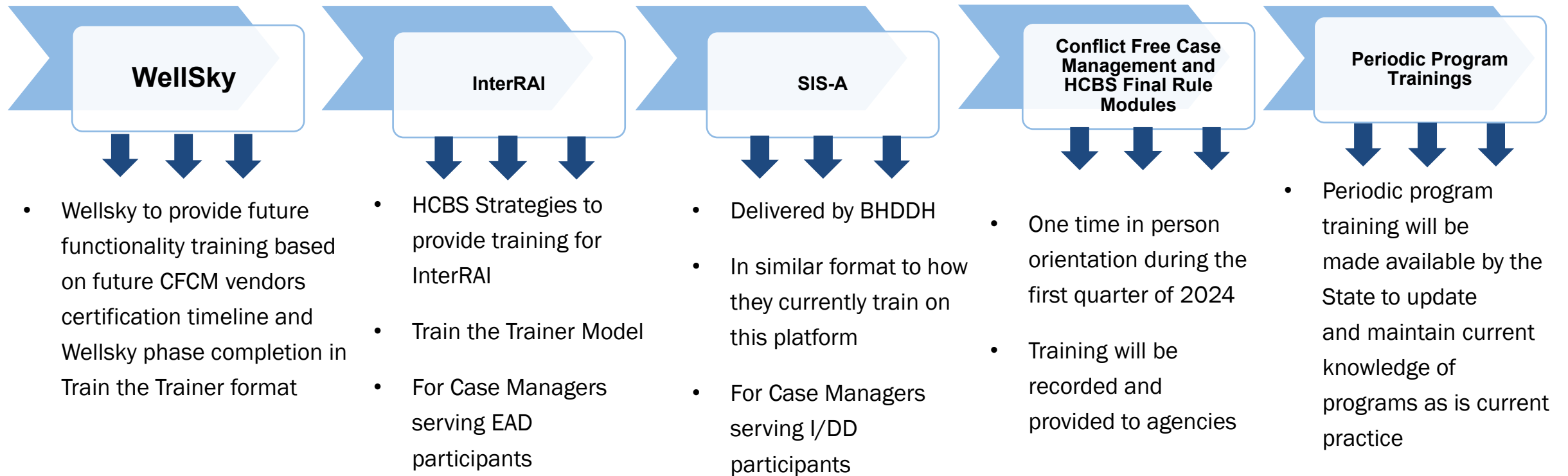
Case Manager Training - Delivered by Case Management Entity

The case management entity is required to provide all new and existing employees an orientation relevant to the organization as a whole and training that relates directly to the provision of case management services. The case management entity is required to provide an orientation and ongoing training to all employees which adheres to State and federal guidelines. Training will include the following, at a minimum*:

1. **General Staff Orientation:** Orientation to all case management staff on the case management entity's policies and procedures.
2. **Population-Specific Training:** Community resources for population groups served and techniques for working with the specific populations and programs.
3. **Health Insurance Portability and Accountability Act (HIPAA):** Training as required by the U.S. Department of Health and Human Services.
4. **Person-Centered Planning:** Training that provides a strong understanding of person-centered thinking and planning, including relevant tools and techniques, that is in line with State and federal rules and regulations.
5. **Supportive Employment:** Overview of case manager's role with ensuring opportunities are made available to experience integrative competitive employment. (The format and delivery of this training will be established by BHDDH.)
6. **Other:** The State will initially develop and deliver trainings regarding its case management system, the InterRAI (for EAD population), and the SIS (for I/DD population). Case management entities will provide ongoing training on these topics.

State Provided Training Methodology

Training for WellSky, InterRAI, and Conflict Free Case Management will happen in separate delivery formats.



Case Manager Orientation Provided by State

Module 1: Introduction to Medicaid HCBS Case Management

Topics

- ❑ CFCM Regulations
- ❑ Roles and Responsibilities

Required Audience: Supervisory staff and case managers

Delivered By: State Staff

Format: One Time In Person

Orientation Q1 2024(*) Pre-recorded webinar, available on State website

Module 2: Delivering Case Management Services

Topics

- ❑ Navigating RI's Case Management System
- ❑ Quality Monitoring and Provider Relations

Required Audience: Supervisory staff and case managers

Delivered By: State Staff

Format: One Time In Person

Orientation Q1 2024(*) Pre-recorded webinar, available on State website

Module 3: HCBS Available in Rhode Island

Topics

- ❑ Overview of Medicaid HCBS
- ❑ HCBS for EAD and I/DD
- ❑ Leveraging State Resources

Required Audience: Supervisory staff and case managers

Delivered By: State Staff

Format: One Time In Person

Orientation Q1 2024(*) Pre-recorded webinar, available on State website

Case Manager Orientation Provided by State -

Module 4: Using RI's Case Management System	Module 5A: InterRAI Assessment Overview	Module 5B: SIS-A Assessment Overview	Periodic trainings regarding State program changes or process updates
<p>Topics</p> <ul style="list-style-type: none">❑ Step-by-step walk-through of Rhode Island's case management software and tools <p>Required Audience: Case managers, Supervisors</p> <p>Delivered By: Wellsky Format: Train the Trainer</p>	<p>Topics</p> <ul style="list-style-type: none">❑ In-depth training on how to complete the InterRAI tool <p>Required Audience: Case Managers who support EAD, Supervisors of EAD Case Mangers</p> <p>Delivered By: State Staff or Vendor Format: Webinars training, Train the Trainer model</p>	<p>Topics</p> <ul style="list-style-type: none">❑ Overview of the SIS-A tool. <p>Required Audience: Case managers who support I/DD, Supervisors of IDD case managers</p> <p>Delivered By: BHDDH Format: TBA</p>	<p>Topics</p> <ul style="list-style-type: none">❑ Updates on State program changes, policy, procedures and process update <p>❑Required Audience: Case managers, Supervisors</p> <p>Delivered By: State Staff Format: Mixed</p>

Next Steps



Activities in December 2023

1. **Monthly stakeholder meeting:** Our next monthly stakeholder meeting will occur on December 14, 2023.
2. **The following will be posted on the website in December:**
 - Transition Plan
 - Draft CFCM Program Manual
 - Final CFCM Certification Standards
 - Certification Standards Application
 - State responses to Certification Standards public comment
 - Stakeholder Q & A from the Nov 30th and Dec 14th stakeholder meetings

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.