



Implementation of the Supports Intensity Scale®

Learning Session 1 for TCMs

July 30, 2014

Balancing Incentive Program (BIP)

- Iowa's award:
 - July 1, 2012 – September 30, 2015
- States required to implement:
 - Efficient access to services
 - Consistent and fair assessments
 - Conflict-free case management

Core Standardized Assessments (CSA)

- Uniform assessments to determine individual need, person-centered
- Supports Intensity Scale® (SIS) for persons with intellectual disability, used in over 30 states
- Assessments will be selected for other populations receiving HCBS
- Telligen, Inc. selected as CSA vendor

Assessment Results

- Assessment can be used for:
 - Eligibility for LTSS
 - Individual need for supports and services
 - Development of service plan
 - Equitable and consistent resource allocation
- Initial resource allocation implementation possibly 3 years
 - Adjustments additional 2-3 years

Frequently Asked Questions

- FAQ addressed today and published after this webinar
- BIP/CSA webpage,
<http://dhs.iowa.gov/ime/about/initiatives/BIP/CSA>
- TCMs billing for SIS time for interview and setting up interview
- Providers – may be part of 24 hour care; researching additional info for FAQ
- IAC will be amended as needed

Opportunity

- SIS interview is opportunity to gain knowledge to inform service planning
- Collaborative effort with member, family, provider in some cases
- First year SIS - LOC workflow should be initiated so that the ISIS LOC dates will coincide with the assessment date
- More later in this presentation

Learning Session Topics

- CSA and TCM collaboration
- Full assessment scheduling process
- Overview of ISIS workflow
- Overview of SIS
- Off-year assessment process
- Next training – SIS reports

CSA and TCM Collaboration

- Scheduling full assessments
 - Confirm member and guardian/representative contact information
 - Individuals/organizations who provide essential supports
 - Identify respondents and contact information
 - Accommodations necessary
 - Interpreter services
 - Location, dates and time of day options
 - Special guidance

Collaboration continued

- Participation in the assessment interview
 - Attend complete assessment
 - Share knowledge of support needs
- Using the report for service planning – details in next webinar series
- Telephonic off-year assessments
 - Schedule and completion

Member Communication

- TCM contacts with member and/or member representative
 - Brochure being developed
- July Member Newsletter announcement
- Scheduler provides information within calls to respondents
- Appointment confirmation letter w/flier
 - Things you should know about SIS
 - Tips for a successful interview

Selection for Full Assessment

- Full assessments – one-third sample of persons currently receiving services
- Newly entering members - full assessment
- Remaining two-thirds – telephonic off-year assessment
- Notices in ISIS of assessment due
- ISIS responses and ISIS notes guide next steps

Limits of One-third Sample

- Must be representative of state – rural and urban
- Distributed across the state
- Will not include children under age 16 – use same process in place now
- Children's version expected next year
- Will include persons over 72



ISIS Workflow

- BIP role – Telligen schedulers and assessors
- Milestone to CM/SW will ask if you have a confirmed qualifying diagnosis
- May need to send to Medical Services for confirmation
- Confirmation of diagnosis avoids stress of interview for non-qualified members



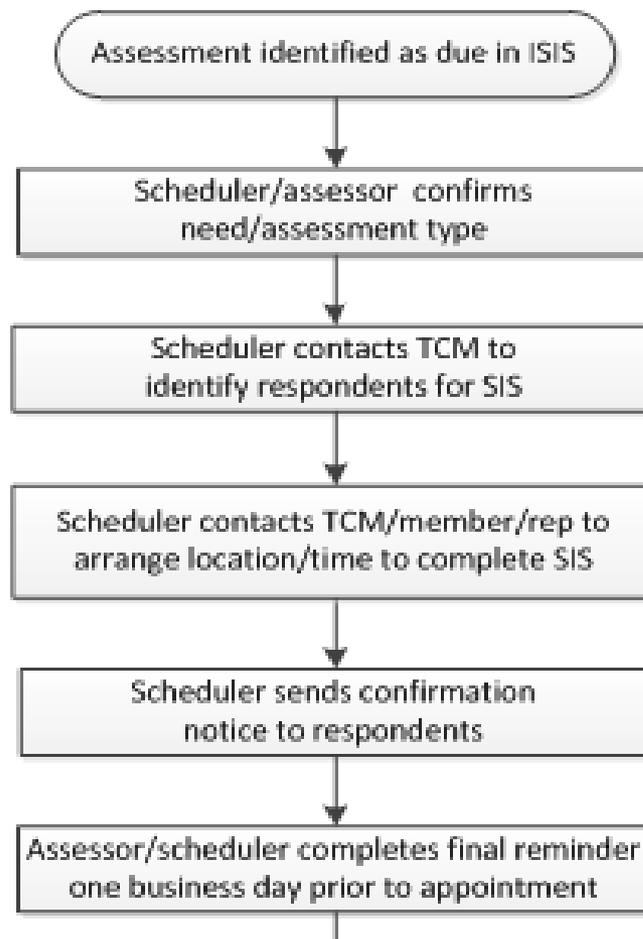
Milestone Responses for BIP

- Full assessment
- Previous assessment is valid – for future years
- CM/SW to complete assessment
- Assessment is scheduled
- Unable to contact consumer – will make multiple attempts using at least two sources

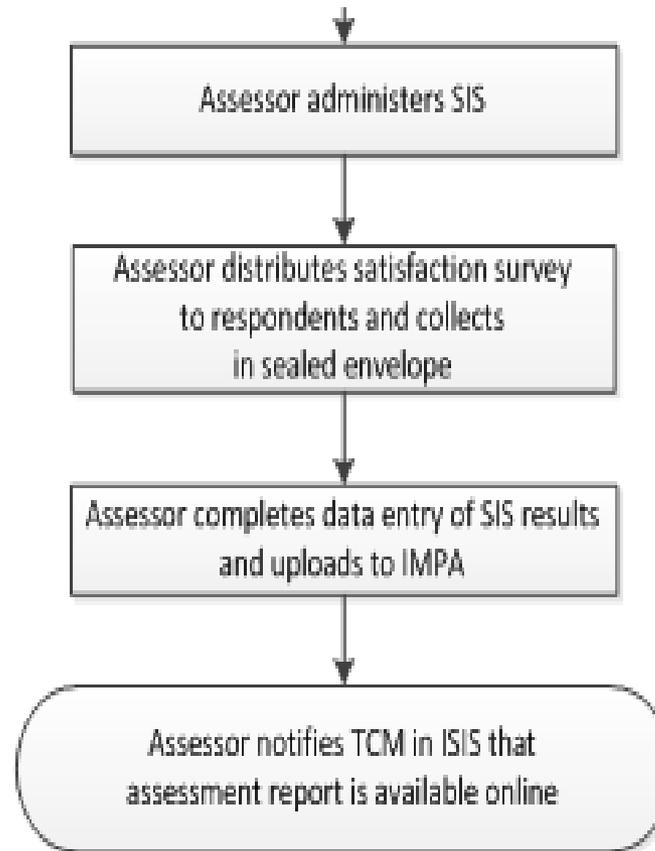
Completed SIS

- BIP will send milestone to CM/SW
- Report posted on IMPA for TCM to retrieve
- TCM may share report with member
- TCM pursues level of care
- TCM uses report to inform service plan – more in next webinar series

Scheduling the Interview



Process Continued



What is the Supports Intensity Scale®?

- Planning tool designed to measure the level of practical supports required by a person with an intellectual or developmental disability to be successful in the community
- Developed by American Association of Intellectual and Developmental Disabilities (AAIDD)

Why SIS?

- Looks at supports needed, not at deficits
- Has excellent range of reliability (.87 inter-rater reliability coefficients)
- Helps identify the support needs of people with disabilities by
 - Fostering positive expectations for life experiences
 - Identifying requirements for planning delivery of consumer-driven, individualized supports
 - Covering topics that drive quality of life – **choices** in social, work and living environments

Who is a SIS Assessor?

- Background of experience with populations
- Completes extensive training to administer the SIS assessment
- Passes the test-retest and inter-rater reliability (IRQR) certification
- Recertified annually through a test-retest inter-rater reliability (IRQR) test

Who is a SIS Respondent?

- Consumer who is able to provide reliable answers
- Individual has known the person being evaluated for at least 3 months
- Has recently observed the person in one or more environments for substantial periods of time (TCM, parent/guardian, friend, staff, job-coach, teacher, self)
- Must have two qualified respondents



How is the SIS Completed?

- Interview with the member/applicant and respondents
- Respondents come to consensus on the score to indicate
 - Type of support
 - Frequency of support
 - Daily support time for each question
- Interview time – 1.5 to 3 hours

Administering SIS/Team Scoring

- If person uses assistive technology, the person should be rated with technology in place (communication system, etc.)
- SIS Respondents should rate ALL items, even if the person is not currently performing a listed activity or has no intention of participating in a particular activity
- There are no answers of “not applicable”
- Ratings reflect a typical day and dominate support

What Does SIS Measure?

- Section I: Support Needs Scale - 49 life activities in six subscales
 - Home Living
 - Community Living
 - Lifelong Learning
 - Employment
 - Health and Safety
 - Social Activities

SIS Measures Continued

- Section II: Protection and Advocacy Activities
 - Eight advocacy items
 - Protection of self and others
 - Money management
 - Legal issues

SIS Measures Continued

- Section III: Exceptional Medical and Behavioral Support Needs
 - 15 medical conditions
 - 13 problem behaviors associated with disability
 - Assumption that certain medical conditions and challenging behaviors predict need for increased levels of support

SIS Interview

- Introduction
- Exceptional Medical/Behavioral Rating Key
- Medical Supports
 - Example: oxygen – needs help putting on tubing and turning it on
- Behavioral Supports
 - Example: hits others when upset

SIS Interview – Supports Needs Scale

- Rating Key
- Support Needs Scale
 - Home Living Activities
 - Example: bathes on own, needs direction with shaving
 - Employment Activities
 - Example: stay on task, get job done in 8 hours
 - Lifelong Learning Activities
 - Example: can identify problem, can't fix problem

SIS Interview – Supports Needs Scale Continued

– Community Living Activities

- Example: able to ride bus, bus doesn't run in evening

– Health and Safety Activities

- Example: able to take meds if direction provided through each step

– Social Activities

- Example: able to be socially appropriate with reminders

SIS Interview Continued

- Supplemental Protection and Advocacy Scale
 - Eight Protection and Advocacy Activities
 - Example: needs encouragement to advocate for self

Completed SIS Assessment

- Assessor enters data in SISOnline
- Uploads report on IMPA
- Completes milestone in ISIS with note
- TCM accesses report on IMPA
- Copies may include the Family Friendly Form and/or the Long Report Form
- TCM may share with member and member representative

SIS Report – Next Learning Session Series

Section 1. Support Needs Scale, continued

Excel

Circle the appropriate number (0–4) for each measurement. (See rating key.) Complete ALL items, even if the person is not currently performing a listed activity. Add the scores across to get a Raw Score. Add the Raw Scores down to get a Total Raw Score.

Part B: Community Living Activities	Frequency					Daily Support Time					Type of Support					Raw Scores
	0	1	2	3	X	0	1	2	3	4	0	1	2	3	4	
1. Getting from place to place throughout the community (transportation)	0	1	2	3	X	0	1	2	3	4	0	1	2	3	4	
2. Participating in recreation/leisure activities in the community settings	0	1	2	3	X	0	1	2	3	4	0	1	2	3	4	
3. Using public services in the community	0	1	2	3	X	0	1	2	3	4	0	1	2	3	4	
4. Going to visit friends and family	0	1	2	3	X	0	1	2	3	4	0	1	2	3	4	
5. Participating in preferred community activities (church, volunteer, etc.)	0	1	2	3	X	0	1	2	3	4	0	1	2	3	4	

Family Friendly Report

Section 1: Support Needs Ratings

Activity Subscale and Score Results

Part A - Home Living Activities				
Item	Type of Support	Frequency	Daily Support Time	Total Score
3. Preparing food	3 - Partial Physical Assistance	3 - At Least Once a Day, But Not Once an Hour	2 - 30 Minutes to Less Than 2 Hours	8
5. House keeping and cleaning	3 - Partial Physical Assistance	3 - At Least Once a Day, But Not Once an Hour	2 - 30 Minutes to Less Than 2 Hours	8
7. Bathing and taking care of personal hygiene and grooming needs	3 - Partial Physical Assistance	3 - At Least Once a Day, But Not Once an Hour	2 - 30 Minutes to Less Than 2 Hours	8
2. Taking care of clothes (includes laundering)	3 - Partial Physical Assistance	2 - At Least Once a Week, But Not Once a Day	2 - 30 Minutes to Less Than 2 Hours	7
1. Using the toilet	2 - Verbal/Gesture Prompting	3 - At Least Once a Day, But Not Once an Hour	1 - Less Than 30 Minutes	6

Off-year Assessments for Remaining Two-thirds

- Assessor will contact TCM to complete in telephonically
- One year from previous assessment in ISIS
- Completed assessment will be posted on IMPA
- TCM can retrieve for file and use in service planning

Off-year Assessment Topics

ADLs

- Eating
- Bathing
- Dressing
- Hygiene
- Toileting
- Mobility
- Positioning
- Transferring
- Communicating

IADLs (not required for children)

- Preparing Meals
- Transportation
- Housework
- Managing Money
- Shopping
- Telephone Use
- Managing Medications
- Employment

Off-year Assessment Topics Continued

Medical Conditions/Diagnoses

Cognitive Function & Memory/Learning

- Cognitive Function
- Judgment/Decision-Making
- Memory/Learning

Behavior Concerns

- Injurious Behavior
- Destructive Behavior
- Socially Offensive Behaviors
- Uncooperative Behavior
- Other Serious Behavior

Off-year Assessment Format

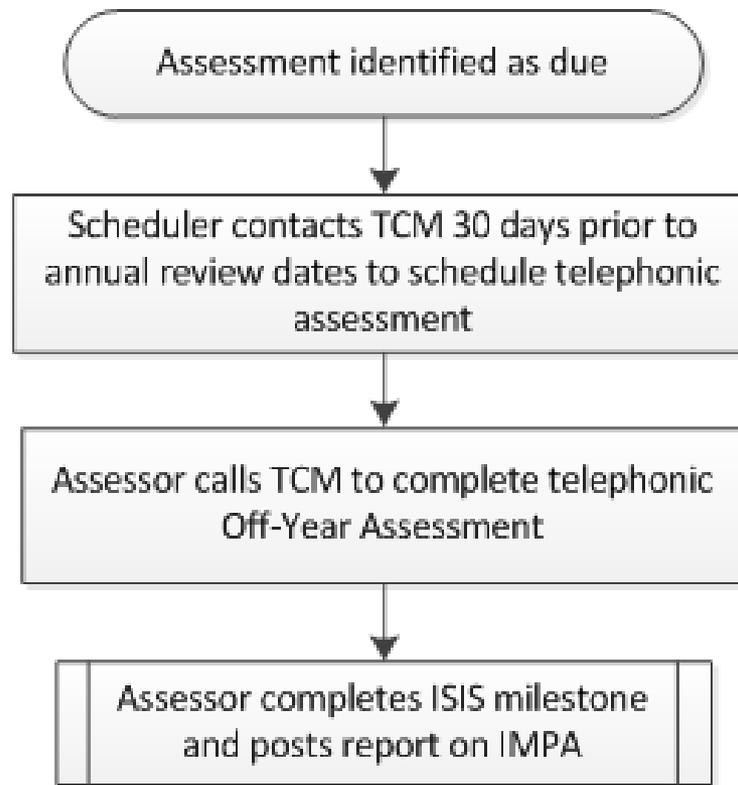
- Focus on any changes member has had since last full assessment
- Has the member's functional abilities improved? Declined? Stayed the same?
- What changes in services are needed and why?

Format Continued

- Key risk factors taken from TCM assessment
 - Sixty-three risk factors
 - All but twenty were covered in assessment
 - These twenty are added below relevant domains

Off-year Assessment Process

Off-Year Assessment



Off-year Assessment Collaboration

- Form will be provided to TCMs
- Review at your quarterly session prior to our call
- Department approved – replaces current annual assessment

Assessment Responsibility

- SIS scheduled after annual comprehensive assessment due
 - TCM completes comprehensive assessment
- SIS scheduled before annual comprehensive assessment due
 - TCM uses completed SIS as annual assessment
 - TCM pursues LOC

Practice Opportunities

- Certification for Assessors in August
 - Need willing participants and respondents to provide practice and/or certification sessions for our Assessors
 - Walmart \$25 gift card for member
 - Experience for TCM or provider
 - TCM may bill if active participant in interview

Additional Training

- Learning Session 2 – August 28 and September 4
- Topics: ISIS, SIS Reports, Emergency Needs Assessments
- Email questions to:
DHSCoreStandardizedAssessments@dhs.state.ia.us
- CSA Toll free number: 1-877-563-6972
- <http://dhs.iowa.gov/ime/about/initiatives/BIPP/CSA>

Questions?

- Submitted questions most frequently asked and answers are presented in the webinar
- These and other questions will be included on the FAQ posted on the BIP/CSA webpage