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| OISP External Workgroup  |

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| 10/21/20 |  | Zoom Meeting  |

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| Type of meeting | *External – OISP workgroup*  |
| Facilitator | *Kelly F, Heidi D, Lisa A, Beth C, Ashley M,*  |
| Note taker | *Cassietta Smith* |
| Attendees |  |

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| Agenda Topic 1:  |

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| Time allotted | Presenter:  |
| Discussion | WelcomeThe external workgroup has accomplished a lot since last July (5 minutes)* Assessment and ISP template developed
* Full testing completed
* IT solution identified

Group will continue to get feedback, continue to give guidance on the next phases of this project, a lot will be around training. **Where we’ve been, where we’re going:**Started with Standardized assessment and standardizing service plan template. Need to go back to the beginning – basics/foundation. Training –* Foundational/philosophy
* Modules for each role by topic

Testing Data (10 minutes)* 100 individuals and their teams
* No training/little instruction or guidance (purposefully)
* Technology issues with forms IO
* Feedback varied greatly
* Identified themes of training needs
* Identified minimal needed changes to the template

Review of the testing data (45 minutes that will include Q&A)* PP presentation to share data

High level overview of themes/patterns* Differences in feedback from ICF testers
* Language challenge /Culture shift (philosophical approach to person centered planning)
* How to change the mindset when assessing and planning for people with intensive needs

**Reminders – responses to data**\*Training (testers received none)\*Use scenarios (lots of examples needed in training)\*Focus on all sorts of needs (training)\*1 or 2 pages for DSP \*Need to define the words – connect language to ICF languageNext Steps\*Meet one on one with the testers, ask more questions, collect more detail\*Look closely at intensive need/ICF feedback\*Look closely at potential redundancy/missing places (ex: place for medical info)10 Minute breakLogo Introduction (5 minutes)***Logo Introduction:***IT Solution (15 minutes that will include Q&A)**Ohio ISP – An Online Solution*****Questions related to OISP Online:******Q. Are doc sheets being generated from the platform?****A. Yes, doc sheets being generated is definitely part of this, people being able to electronically document is not part of this current piece of work.****Q. When will third-party vendors have access to information?****A. Third party vendor, soon as next week.****Q. Will CB/ICF’s be able to try Salesforce once Sense Corp has ISP/built?****A. Earliest time to try it is during the user acceptance.****Four Known Third-party vendors from Ed Carr:****\*Primary Solutions**\*Brittco**\*Medisked**\*iData*Sales Force-IT PlatformSense Corp-IT vendor developing IT solution within Sales Force* Shared requirements given to Sense Corp related to how assessment informs ISP, for example:
* Outcomes, risks, important to/for, skills and abilities.
* If you check the box at the end of each section – the system will prompt that you had indicated this area might be an outcome
* if you selected someone needed a service – the system will prompt that you’d indicated that services are needed
* Keep in mind this is where we are at today with salesforce and things can/may change.
* Additional requirements shared:
	+ the ability to upload additional assessments
	+ the ability to add additional information
* Shared the phone a friend experience – representatives from waiver & ICF to provide quick answers to “blockers” that would have delayed Sales Force and Sense Corp
	+ not everyone needs a full plan – working on criteria for a condensed plan that would only require the introduction page and possibly limited basic information
* Daily meetings were held to ensure requirements are met and OSSAS team and Sense Corp team are on the same page so they understand the wants and needs of the field.

Tester feedback Delaware CBDD (10 minutes) **Delaware CB experience with testing – Cheryl Smart & Heidi Hackworth.***Doing the assessment and/or starting the plan and having it in, was a noticeably short amount of time, for most people, plans that were due in Sept, Oct, Nov were already completed.**Q. Explain who you worked with, how you made the selection, information provided to the team?**A. 19-year-old in high school, who was transitioning, Mom who is the Guardian (not yet due to Covid-19), and provider meet on Zoom and was able to complete the first part in one day. Flowed nice, once entered onto web form then information auto populated.**Q. Testers stated duplication in form, your thoughts?**A. Repetitive at first but after going through it and seeing “what is important to and important for”, it made sense for the duplication. Flowed well.*Next Steps * High- level overview (Part 1 and Part 2) (15 minutes)
	+ Recordings/live chats/future role specific trainings
	+ *Part One – Philosophical Changes* and why we are here, why we needed to develop some standardization and simplification. Required for SSA’s & QIDP’s.
	+ Part Two – High level review of the actual assessment and plan template and standardization a little bit about the IT solution. Required for SSA’s & QIDP’s.
	+ Live chats in November and December (with an OSSAS Manager and a Reviewer) to ask questions related to high level overview parts 1 & 2.
* Don’t plan on making changes within the 1st year
* DODD plans to do presentations at OACB/OPRA to support streamlining and consistency
* No November meeting will reconvene in December, any important communications will be via email.

**Summary of Next Steps:*** *Scheduling some time to get more people to talk about their testing experiences.*
* *Spend time in the communication area of the assessment.*
* *Sending out two-part recorded webinar high level overview to external OISP group as soon as its available.*
* *Will be including members in training development as needed.*

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