



## DD Caseload Estimating Conference

**Monday, April 24**



The DD caseload estimating conference will be held on Monday, April 24. The Revenue and Caseload Estimating Conference is held twice a year to provide for a stable and accurate method of financial planning and budgeting analysis by the state budget officer, Senate fiscal adviser and House fiscal adviser. All of the meeting are livestreamed on [Capitol TV](#). Please refer to the [daily schedule](#) for the exact time.

## The 90-Day Challenge:

### How to Retain Direct Support Professionals from Day One

**Wednesday, May 17, 2023 from 2:00 PM to 3:00 PM**

[Click here to register](#)

The first 90 days are a crucial period when new DSPs are still adjusting to their roles and may be at risk of burnout or turnover. This webinar will explore practical steps that agencies and people who self-direct their services can take to address this challenge and ensure DSPs stay engaged and committed to their work.

First, Barbara Kleist, Program Director at the Institute on Community Integration (ICI), will share her expertise on this topic, drawing from ICI’s interactive online training resources for people who self-direct their services. Next, Andrew Whalen, a person who self-directs his services, and three DSPs (Alicia Cole, Britney Eley, and William Harold) will share their perspectives on best practices to engage and retain DSPs.

By the end of this session, attendees will gain new strategies to boost DSP engagement and support early in their employment—and improve retention in turn.

*Visit the Rhode Island Statewide Workforce Initiative Community Hub to stay informed, access resources, and connect with one another: <https://riswi.org/>*



## **Conflict Free Case Management Update**

RI EOHHS recently posted new and updated materials to its [conflict-free case management \(CFCM\) webpage](#):

1. **Updated CFCM Strategic Plan:** RI EOHHS made several updates including clarifying the HCBS participants that are excluded from the CFCM initiative. All revisions made to the prior CFCM Strategic Plan are summarized on page 1.
2. **CFCM Fact Sheet:** 1-page document that clearly defines CFCM and the impact in Rhode Island. The fact sheet is attached to this newsletter.
3. **Conflict of Interest Fact Sheet:** 1-page document that clearly defines conflict of interest in HCBS. The fact sheet is attached to this newsletter.

**What's Next?** RI EOHHS is currently reviewing results from its CFCM request for information (RFI) which closed in early April 2023. To continue the State's stakeholder engagement efforts, RI EOHHS will schedule a public webinar in late April 2023 to provide a status update and to answer stakeholder questions.

## **Webinar on Supporting Independence and Inclusion** **Using the Temple University Community Participation Measure** **Friday, April 21, 2023 from 1:00-2:30 PM** [Click Here to Register](#)

Join Commit to Connect for a webinar to learn about the Temple University Community Participation Measure. This tool assesses self-directed community participation interests of adults with psychiatric disabilities and autistic adults to guide community inclusion supports planning.

The webinar will discuss the origins of the measure, what it assesses, and research findings. Key staff from the Alliance of Disability Advocates North Carolina, a center for independent living, will also present on their partnership with Temple and their experiences using the tool. They will share how they use the tool to identify client needs and develop plans to support community participation.

The speakers will be available for discussion with webinar participants to explore how agencies can implement similar strategies. The webinar will include closed captioning and ASL interpreting.

If you have any questions, please reach out to [info@committtoconnect.org](mailto:info@committtoconnect.org).

## SIS Changes and New Questions

BHDDH has begun to use an additional questionnaire to be reviewed at the time of the SIS-A meeting. This questionnaire is intended to help capture more information about an individual's support needs. The SIS interviewer will be able to help you during the interview process if you have any questions about the questionnaire. The questions cover seven areas:

1. Criminal involvement/sexualized behaviors/fire setting
2. Co-occurring Alzheimer's/Dementia diagnosis
3. Co-occurring Behavioral Health diagnosis
4. Exceptional behavioral need
5. Exceptional communication need
6. Exceptional medical need
7. Exceptional circumstances (caregiver/ environment)

In addition to the questionnaire, BHDDH is working with AAIDD to prepare for the rollout of the The Supports Intensity Scale - Adult Version® (SIS-A) 2<sup>nd</sup> Edition.

### **The SIS-A 2<sup>nd</sup> Edition**

The SIS first came out in 2004 and was last updated in 2015. The update had goals to make sure that the SIS-A still accurately measures support needs and to find out if new norms were needed. The new edition includes several enhancements.

The project showed that some new items need to be added to the SIS-A. Adding new items will make sure that important support needs are not overlooked. One change is that *Advocacy Activities* will now be included in the SIS-A scale, which broadens the understanding of a person's overall support needs and identifies the supports a person with IDD needs to advocate for themselves.

Another change is to add a *Communication* section to the exceptional supports needs. Just as exceptional medical and behavioral needs are important to consider when assessing the intensity of support people need across multiple life activities, recognizing exceptional supports needed for communication is critical to participating in every domain of life.

### **What are norms?**

A norm-referenced assessment is scored by comparing a person's performance to others who are similar. IQ tests are an example of a normed test. The SIS-A is also based on norms. All norms need to be updated from time to time. New norms ensure that a person's scores remain meaningful in comparison to today's population rather than with people from over 20 years ago. New norms were created for the second edition of the SIS-A based on the people of today, including adults up to age 84.

For more information, please see the ***Frequently Asked Questions About the Upcoming Second Edition of the SIS-A*** attached at the end of this newsletter or visit the [AAIDD website](#).

## April is World Autism Acceptance Month

During Autism Acceptance Month, we celebrate the contributions of persons with autism and renew our resolve to advance their inherent rights. Rhode Island is one of only three states with a prevalence rate of ever-diagnosed autism over 4%.

Despite important progress, persons with autism continue to face social and environmental barriers to full inclusion. We must do better – by promoting inclusive education, equal employment opportunities, self-determination, and an environment where every person is respected. We need to address the disparities people with autism face and to support them with tools that facilitate clearer communication, increased productivity, and greater independence. And as we do so, we also recognize the role of families, caregivers, and support networks in the lives of persons with autism.

Today and every day, let us fully recognize the active and diverse contributions of persons with autism to our State, and let us work together with persons with autism to build more welcoming and inclusive communities.



### **TechACCESS of Rhode Island**

Assistive Technology can support individuals with autism in a variety of ways, from sensory supports to communication devices. [TechACCESS of Rhode Island](#) has shared the following resources and information from neurodiversity-affirming practices and neurodiverse individuals.

#### [Autism Level Up](#)

#### [SPARK](#)

#### [CommunicationFIRST](#)

#### [NeuroClastic](#)

#### [The Nora Project](#)

#### [The AAC Coach](#)

#### [Dr. Barry Prizant](#)

#### [Temple Grandin \(and her new book\)](#)

[PrAACtical AAC](#) (be sure to check here for a list of April AAC App discounts!)



**The Assistive Technology Access Partnership (ATAP)**  
**2nd Annual Assistive Technology Awareness Day Event!**

**Tuesday, April 18th**

**Drop in from 3:00 PM – 6:00 PM**

**Rhode Island College Student Union Ballroom**

**[Click Here to Register](#)**



Join the Assistive Technology Access Partnership (ATAP) to celebrate National Assistive Technology Awareness Day!

ATAP will host an Open House at RI College on Tuesday, April 18th from 3-6 pm. Visit ATAP partners and state agencies that support and promote the AT movement. Gather resources, network, and grab some refreshments.

ATAP will also be inaugurating the ATAP Assistive Technology Champion award!

The first 100 people to [register](#) will receive an AT Swag Bag filled with AT gadgets!

**RIPIN and RI Medicaid Present:**  
**Understanding the Restart of Medicaid Renewals**

**Tuesday, April 18th, at 12:00 PM - 1:00 PM**

**Location: Zoom**

In this session, RIPIN and the RI Medicaid staff will provide detailed information about the impact of the end of pandemic-related Medicaid coverage.

Presenters will share:

- An overview of the renewal timeline including how enrollees can prepare for recertification.
- Guidance on how the Medicaid recertification process works, for people who are still eligible.
- An explanation of coverage options for people losing Medicaid.
- Sources of specialized assistance for completing recertifications.
- Help detecting and escalating individual and systemic problems.

Looking for more information? Visit the [Be Ready. Stay Covered. site](#)



**BE READY.**  
**STAY COVERED.**

## **RI Grant and Alternative Funding Resources for Providers and Individuals**

Below is a list of resources for alternative funding to supplement the funding provided by BHDDH and the Office of Rehabilitation Services (ORS) for Supported Employment.

Resources on this list provide alternative opportunities to increase access to competitive integrated employment for youth and adults with disabilities in support of their desire to live and work in the most integrated setting in their communities. Some are available to individuals and some are open to providers only.

Employment is an important part of anyone's life. Competitive work or Self-Employment gives people a sense of purpose and positive self-worth. Work increases a person's income and improves his/her financial future. Working improves a person's quality of life.

### **Program Grants**

[Grant Makers RI](#)

[National Council of Nonprofits](#)

[Grants.Gov](#)

[Candid Foundation Directory](#)

[State of Rhode Island Grants Funding Management](#)

[Rhode Island Foundation](#)

[USA Grant Applications](#)

[Grants Reach](#)

[The John E. Fogarty Foundation](#)

### **Assistive Technology Supports and Resources**

[The Rhode Island Assistive Technology Access Partnership \(ATAP\)](#)

[Adaptive Telephone Equipment Loan Program \(ATEL\)](#)

[I Can Connect](#)

[Rhode Island Relay / Hamilton RCC](#)

[Ocean State Center for Independent Living](#)

### **Employer Resources**

[The Employer Assistance and Resource Network on Disability Inclusion \(EARN\)](#)

[IRS - Tax Benefits for Businesses Who Have Employees with Disabilities](#)

[US Department of Labor – Tax Incentives for Employers](#)

**Mental and Behavioral Health  
Policy Briefing**

**Tuesday, April 25 at 12:00 PM**

**[Click Here to Register](#)**

Join [NAMI Rhode Island](#) and [MHARI](#) for the annual virtual Policy Briefing on Tuesday, April 25th at 12:00 PM via ZOOM.

Grab your lunch and learn about the mental/ behavioral health community’s most pressing legislation and budget articles in 2023.



**May is  
Mental Health Month!**

There will be a series of virtual events and opportunities offered by [NAMI Rhode Island](#), [MHARI](#), and other partners throughout May.

This year will offer advocacy activities, learning opportunities, and NAMI’s flagship Bridging the Gaps event to strengthen RI’s personal and professional networks in the area of mental health starting with the [#mayismentlhealthmonth](#) kick-off at the State House.



## Contacting DD Staff

See the full Division Contact List attached to this newsletter.

Monday-Friday  
8:30 AM - 4:00 PM  
for questions or support  
**(401) 462-3421**  
Para español, llame  
**(401) 462-3014**

Send general questions to the  
AskDD email address.  
[BHDDH.AskDD@bhddh.ri.gov](mailto:BHDDH.AskDD@bhddh.ri.gov)  
Please do not email critical issues.

## Sign Up for Our Email List

If you aren't receiving email updates  
and newsletters from BHDDH, you can  
[sign up here](#) or on our website. Go to



<https://bhddh.ri.gov/developmentaldisabilities/events/newsandupdates/> to sign up or to see  
past quarterly newsletters and issues of DD News.

## **If you are experiencing a mental health crisis, BH Link is here for you**



BH Link's mission is to ensure all Rhode Islanders experiencing mental health  
and substance use crises receive the appropriate services they need as quickly  
as possible in an environment that supports their recovery. Call 911 if there  
is risk of immediate danger. Visit the BH Link website at [www.bhlink.org](http://www.bhlink.org)  
or for confidential support and to get connected to care:

CALL **(401) 414-LINK (5465)** If under 18 CALL: **(855) KID(543)-LINK(5465)**

Visit the 24-HOUR/7-DAY Triage Center at **975 Waterman Avenue, East Providence, RI**

## For Information on the Consent Decree

For information on the Consent Decree and BHDDH, see <https://bhddh.ri.gov/developmental-disabilities/consent-decree>.

## Report Suspected Abuse



To report abuse and serious  
incidents call the QA hotline at  
**(401) 462-2629**

The Quality Assurance (QA) Unit at BHDDH  
operates a 24 hour hotline, seven days per week,  
365 days per year. Staff respond to reported  
incidents of abuse, neglect, mistreatment and  
financial exploitation.



## Division of Developmental Disabilities - All Staff Contacts

**Main Phone #:** (401) 462-3421    **TDD:** (401) 462-3226    **Website:** <https://bhddh.ri.gov/>  
**Fax:** (401) 462-2775    **Spanish Line:** (401) 462-3014    **BH Link:** (401) 414-5465

**To report abuse/neglect:**  
**(401) 462-2629**

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# MEDICAID HCBS: CONFLICT-FREE CASE MANAGEMENT (CFCM) FACT SHEET

## CFCM Fast Facts

**Purpose** CFCM will help Medicaid HCBS participants gain access to services, maintain independence at home, and maximize their well-being.

**Included** CFCM is mandatory for all HCBS participants who receive Medicaid Long-Term Services and Supports (LTSS) or are eligible to receive Medicaid LTSS via fee-for-service at home or in a community setting.

**Excluded** HCBS participants who are excluded from the CFCM services system are generally receiving case management and care planning services through an entity that meets or is not subject to the federal conflict of interest provisions. HCBS participants not included in this initiative include:

- 1) PACE participants
- 2) Katie Beckett eligible children
- 3) Other Medicaid income eligible children who receive Medicaid services at home or in the community under the Medicaid State Plan EPSDT provision
- 4) Medicare-Medicaid Plan (MMP) for Elders and Adults with Disabilities (EAD) participants who decide to receive HCBS from their MCO
- 5) Nursing Home Transition Program (NHTP) including Money Follows the Person (MFP)
- 6) Integrated Health Home
- 7) The Office of Healthy Aging's At Home Cost Share program



### What Is Changing:

- Current delivery and standards of Medicaid HCBS case management



### What Is Not Changing:

- Access to services
- Medicaid eligibility process
- Local knowledge and expertise

## WHAT IS CONFLICT-FREE CASE MANAGEMENT?

Conflict-free case management (CFCM) means that the entity assisting a participant to gain access to services is different and separate from the entity providing those services (e.g., a home and community-based (HCBS) provider agency), as a potential conflict may exist if the same entity is providing both case management and the referred service(s). The Centers for Medicare and Medicaid (CMS) established CFCM to promote participant choice and independence by limiting conscious or unconscious bias by a case manager when assisting a participant to access services.

CFCM is a service system that includes the following four core components:

1. *Information Gathering*: A comprehensive review of a HCBS participant's goals, needs, and preferences
2. *Person-Centered Plan Development*: A written person-centered plan that articulates a HCBS participant's care needs, wants, and supports (paid and unpaid) that will assist an HCBS participant in achieving their goals
3. *Connecting to Services & Supports*: Connect the HCBS participant to paid and unpaid supports
4. *Plan Monitoring & Follow-up*: Regular contact to review goal progress & effectiveness of services

## WHY NOW?

In 2014, CMS released the HCBS Final Rule requirements. These new requirements were driven by and developed to increase person-centeredness. Part of the HCBS Final Rule (after multiple extensions) required states to have a compliance plan by March 2023.

## WHO WILL PROVIDE CFCM?

The State anticipates contracting with one or more CFCM entities to create a network of providers through a competitive request for proposal (RFP).

## WHEN WILL THIS HAPPEN?

**Beginning January 1, 2024, RI EOHHS estimates that approximately 11,387 HCBS participants are targeted to receive CFCM under this initiative.** RI EOHHS will transition HCBS participants into CFCM throughout CY 2024 based on a HCBS Participant Transition Plan.



# CONFLICT OF INTEREST UNDER MEDICAID HCBS FACT SHEET

## Conflict of Interest Fast Facts

**Definition** Conflict of interest is when a person has competing influences that could affect a decision or action.

### Federal Requirements

42 CFR 431.301(c)(1)(vi): Providers of HCBS for the individual, or those who have an interest in or are employed by a provider of HCBS for the individual must not provide case management or develop the person-centered service plan.

42 CFR 441.730(b): Requires that case management activities, including the development of the person-centered plan, must not be performed by any individual or entity who is employed by or has an interest in a provider of services included in the person-centered plan.

42 CFR 431.10: Eligibility determinations can only be conducted by a government agency.

### Conflict of Interest in Rhode Island

Approximately 7,500 of RI's Medicaid HCBS participants, who fall under CMS's HCBS Final Rule, receive case management that is not conflict-free.

## WHAT IS CONFLICT OF INTEREST?

Conflict of interest refers to a real or seeming incompatibility between the private interests and the official responsibilities of a person in trust. In other words, a conflict of interest is when a person has competing influences that could affect a decision or action.

## HOW DOES CONFLICT OF INTEREST APPLY TO MEDICAID HCBS?

CMS requires that providers of Medicaid home and community-based services (HCBS), or those who have an interest in or are employed by a provider of Medicaid HCBS, may not provide case management to or develop the person-centered plan for participants receiving services. CMS requires that states have conflict-free case management (CFCM) which means that case management is delivered conflict free (i.e., the case manager does not provide direct services to the same participant).

Conflict of interest does not apply to:

1. State agency staff (unless the state agency staff member is related to or married to the participant).
2. Medicaid programs that have authorized restrictions (such as managed care).

## CMS EXAMPLES OF CONFLICT OF INTEREST

1. **Self-Referral:** An organization provides both case management and direct services to the same participant when there are other organizations that could also serve the participant. The case manager has a potential incentive to refer participants to services within his/her own organization as opposed to an outside agency that could be a better fit for the participant in terms of services provided or location.
2. **Quality Oversight:** In the same situation as above, due to the case manager needing to assess the performance of coworkers, there is also potential for conflict of interest for the case manager in ensuring that supports and services are being provided in a high-quality manner in accordance with the person-centered plan.
3. **Steering:** A case manager may, due to their conscious or unconscious opinion in the best interest of a participant, steer towards or away from certain providers or services, which could artificially limit the available pool of providers or set of available services.

## WHAT WILL RHODE ISLAND DO TO PREVENT CONFLICT OF INTEREST?

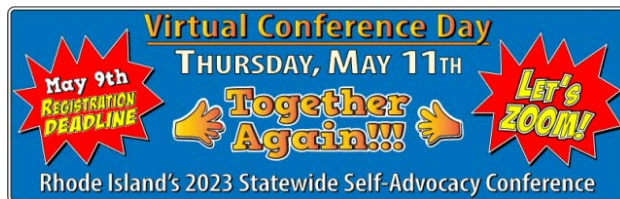
1. Implement conflict-free case management for Medicaid HCBS participants starting January 2024.
2. Create uniform assessment and referral tools to ensure equal treatment across HCBS providers.
3. Provide ongoing quality monitoring and oversight by state staff.
4. Continue to conduct all Medicaid HCBS eligibility determinations by state staff.



## RI's 2023 Statewide Self-Advocacy Conference

Thursday, May 11th on Zoom/ Friday, May 12th at the Providence Marriott

Check out our Conference Page for more info: [www.advocatesinaction.org/togetheragain](http://www.advocatesinaction.org/togetheragain)



Day 1 of "Together Again" will take place virtually over Zoom on Thursday, May 11th, from 10:00 am to 2:30 pm. (There will be a one-hour lunch break from 12:00 pm to 1:00 pm.)

There's NO COST to attend the first day of the conference, thanks to support from the RI DDD. Your free registration includes Workshop Presentations, General Sessions, Music, Contests, and more!

The Registration Deadline for the Virtual Conference Day is Tuesday, May 9th. Go to [advocatesinaction.org/togetheragain\\_day](http://advocatesinaction.org/togetheragain_day) to complete the Registration Form and reserve your spot to join us on Zoom!

Day 2 of "Together Again" will held IN-PERSON at the Providence Marriott Downtown on Friday, May 12th, from 6:30 pm to 11:00 pm!

Tickets for the Dinner Dance cost a reduced price of \$30 Per Person, thanks to support from the RI DDD. Your ticket will include a banquet dinner, and an evening of dancing, games and fun, featuring live music from *Mark Cutler and the Men of Great Courage!*

The Registration Deadline for the Dinner Dance is Friday, May 5th, but space is limited. Go to [advocatesinaction.org/togetheragain\\_dinnerdance](http://advocatesinaction.org/togetheragain_dinnerdance) to purchase your ticket(s).



Contact us with any with any questions, comments or requests for information about RI's 2023 Statewide Self-Advocacy Conference.

Email Us at: [AinA@advocatesinaction.org](mailto:AinA@advocatesinaction.org)

Call Us at : 1-877-532-5543

# WORK INCENTIVES CONNECTION

News and resources for Social Security Beneficiaries in RI

April 3, 2023

## Tax Season is Here!

Tuesday, April 18, 2023 is the deadline for filing your federal and Rhode Island tax return. Filing taxes does not need to be stressful. Explore the resources in this newsletter to get help and answers to your questions.

## Free Tax Preparation Services

The VITA (Volunteer Income Tax Assistance) program offers free tax preparation and e-filing services to individuals and families with an annual household income at or below \$54,000.

To find a site near you, call 211 or visit <https://unitedwayswi.org/supported-programs/vita-program/>.

## Earned Income Tax Credit

If you are working, you might be eligible for the Earned Income Tax Credit!

The Earned Income Tax Credit, as known as EITC or EIC, is a benefit for working people with low to moderate income. To qualify, you must meet certain requirements and file a tax return, even if you do not owe any tax or are not required to file. EITC reduces the amount of tax you owe and may give you a refund. Visit the IRS website to learn more: <https://www.irs.gov/credits-deductions/individuals/earned-income-tax-credit-eitc>.

## Work Incentives Webinars

<http://www.ric.edu/sherlockcenter/wi.html>

If you receive SSI or SSDI, or support someone who does, consider attending a webinar to learn how work incentives can help make it easier to reach your employment goals. Work Incentives Information Webinars are offered free monthly. The webinar calendar is available on the Sherlock Center website. Use the link above to learn about upcoming sessions.

## Upcoming Sessions

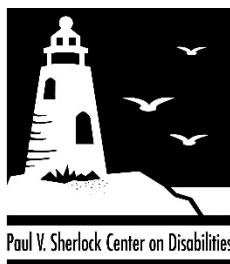
**April 20**, 6:00 – 7:00 PM: Work Pays! An Introduction to Youth Work Incentives

**April 26**, 12:00 – 1:00 PM: SSI Overview

## Join Our Mailing List

<http://bit.ly/2xvYGtL>

For more information, join our mailing list or contact the Sherlock Center.



Vicki Ferrara, [vferrara@ric.edu](mailto:vferrara@ric.edu)

Jeanne Fay, [jfay@ric.edu](mailto:jfay@ric.edu)

**Paul V. Sherlock Center on Disabilities / RI College**

600 Mt. Pleasant Avenue, Providence RI 02908

Website: [www.sherlockcenter.org](http://www.sherlockcenter.org)

Phone: 401-456-8072

TTY or Spanish via RI Relay: 711

# SELF-DIRECTED SUPPORTS NETWORK

A NETWORK OF INDIVIDUALS AND FAMILY MEMBERS USING SELF-DIRECTED  
SUPPORTS IN RHODE ISLAND

## ONLINE MEETING

Wednesday, **April 19, 2023**

7:00 – 8:30 PM

**Dialogue with: Susan Raposo, Shelia Coyne, Claudia Lowe, Sue Babin**

**Learn about what organizations are doing with the  
Transformation Funds**

(Invite your Direct Support Professionals to join)

This meeting will take place online using Zoom. When you RSVP, you will receive an email with the directions and a password to join the meeting. You can connect by computer, mobile device, or listen using your telephone. You may be prompted to download an app depending on the device you plan to use.

The Self-Directed Supports Network is a resource for individuals and families using self-directed supports through the Division of Developmental Disabilities. Meetings provide an opportunity to share experiences and learn from others.

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## AGENDA

**7:00 – 7:30 – Dialogue with Susan Raposo – BestlifeRI**

**7:30 – 8:00 – Shelia Coyne & Claudia Lowe – RI Self Directed Coalition**

**8:00 – 8:30 – Dialogue with Sub Babin – RI Developmental Disabilities Council**

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RSVP LINK: <https://bit.ly/2YUamqz>

Please RSVP using the link above. Click the link or cut and paste it into your browser. If you need a reasonable accommodation (e.g., ASL Interpreter, large print) or information in a language other than English, please make your needs known when you RSVP.



For questions, call or email Crystal Cerullo, Sherlock Center on Disabilities:

Email: [ccerullo@ric.edu](mailto:ccerullo@ric.edu)

Voice: 401-456-8915 TTY: 711



# A Quest for Independence!



August 7-11, 2023

***A Summer Camp Program  
for Teens and Young Adults with Disabilities (Ages 16-23)  
at Camp Canonicus in Exeter, RI***

This is a one-week residential program that provides teens and young adults with disabilities ages 16-23, an opportunity to develop employment and independent living skills in a supportive environment.

Well-defined instruction, in small groups and individually, will provide training in the areas of employment and job skills, social skills, including maintaining positive mental health, and independent living skills. There will be recreational opportunities as well!



## **Eligibility Criteria:**

**To qualify for this program applicants must:**

- have a disability
- be between 16 and 23 years old
- be self-directed and able to make their own choices
- be a Rhode Island resident

***APPLICATION DUE:***

***May 19th***

***To apply, visit [oscil.org](http://oscil.org) or contact:***

***Josh Conti***

***[josh.conti@oscil.org](mailto:josh.conti@oscil.org)***

***401-738-1013***

There is no cost to students or their families. Lodging, food, activities, transportation, interpreters for the Deaf, and personal care attendants for students with physical disabilities will be provided.

Funding authorization for this program may be obtained from your Vocational Rehabilitation Counselor from the Office of Rehabilitation Services or Services for the Blind and Visually Impaired.

***Brought to you by:***

**Ocean State Center for Independent Living**

# Frequently Asked Questions

## About the Upcoming Second Edition of the SIS-A

This list of frequently asked questions (FAQs) is intended to compliment the AAIDD February 2022 memo on the upcoming second edition of the Supports Intensity Scale-Adult Version® (SIS-A®). A plain text summary of the memo is also available.

### SIS-A Purpose

#### 1. How does the SIS-A benefit people with IDD and their families?

The SIS-A provides a picture of the overall pattern, type, and intensity of the support needs of a person with intellectual and developmental disabilities (IDD). This important information can be used in developing a person-centered support plan and targeting supports to where they are most needed by the person to have their best life.

#### 2. How does the SIS-A benefit service providers and governmental entities?

Service providers and governmental entities can use aggregated SIS-A data to get an overall picture of the needs of the population they serve and to inform the development of strategies to best meet people's needs. The possible utility of SIS-A data to inform organizational and jurisdictional decision-making was described in the tool's original 2004 manual and since then, numerous jurisdictions have transitioned to more equitable resource distribution strategies informed in part by their SIS-A data. In addition, current data can be used to inform planning to meet the future needs of those supported.

### SIS-A interviews

#### 3. Will these enhancements to the SIS-A increase the time it takes to do the assessment?

No. The time needed to complete the assessment is not affected by the enhancements.

#### 4. Will respondent's interview experience be about the same with the second edition of the SIS-A?

Yes. While interviews will flow more smoothly and efficiently with the second edition, the areas assessed are consistent between the editions. AAIDD expects that improved flow and efficiency will result in an improved interview experience for respondents.

#### 5. Does extending the norms to people up to age 84 change how the SIS-A is conducted?

No. The SIS-A is a standardized assessment conducted using a uniform procedure to identify the unique support needs of the person being assessed. The norming sample for the second edition of the SIS-A included adults with IDD aged 16–84, but the SIS-A assessment procedures does not change.

It is important to assess a person's support needs for each life activity in the SIS-A, even those life activities for which the person or their culture, family, community, or age group may not place a lot of importance. Certain items in the SIS-A may not be particularly relevant for every person being assessed, but completing all items in the assessment is essential. Comparison of a person's complete assessment with the norming sample of other complete assessments is the foundation for standard scores. Standard scores cannot be produced if any item on the standardized portion of the scale is skipped.

#### 6. Are virtual SIS-A assessments as reliable and valid as in-person assessments?

Yes, virtual SIS-A assessments are as reliable and valid as in-person assessments. A research brief is available on AAIDD's website that describes an analysis of data from virtual and in-person assessments. Its findings show that the two interview formats produce results of equivalent reliability and validity.



### **7. Should respondents be concerned about which edition of the SIS-A is used in an assessment?**

No. Both editions of the SIS-A accurately measure the support needs of adults with IDD. AAIDD will work with each state or jurisdiction to transition their users to the second edition. The current SIS-A and SISOnline will be supported for approximately 18 months following the release of the second edition in early 2023. AAIDD will maintain two editions of the SIS-A and SISOnline until mid-2024 or until all jurisdictions have transitioned, whichever comes first.

## **SIS-A Scores**

### **8. In general, how much will a person's standard scores change when shifting from the current to the new norms?**

For most people, the difference in their standard scores using the old and new norms will be minimal. However, for some people, the difference in standard scores will be notable, even if the types of supports they need on a daily basis and their raw scores have not changed. Their standard scores may go up or down because their support needs are being compared with those of a different sample of peers than they were before and because of the inclusion of an additional scale that contributes to the composite Support Needs Index (SNI) score.

### **9. How will a change in a standard score translate into funding or service changes?**

AAIDD's focus is on the valid and reliable assessment of the individual support needs of adults with IDD using the SIS-A. Strategies to apply assessment results in individual budget allocations or to assign rate reimbursement tiers for service levels are developed independently by each jurisdiction or governing entity. Jurisdictional or governing entities are encouraged to analyze their own data to determine the extent to which changing scores (if any) might affect their approaches to allocating resources.

## **Enhancements to the SIS-A Assessment**

### **10. What are the major benefits of the enhancements to the second edition of the SIS-A?**

The changes for the second edition of the SIS-A have several benefits for stakeholders:

- New norms ensure that a person's scores remain meaningful in comparison to today's population rather than with people from over 20 years ago.
- New items added to the exceptional support needs section will provide finer distinctions in support need and ensure that important support needs are not overlooked.
- The supplemental *Protection and Advocacy (P&A) Activities* scale is renamed *Advocacy Activities* scale to better reflect the agency of the individual assessed.
- The *Advocacy Activities* scale is incorporated into the SIS-A as a normed scale which broadens the understanding of a person's overall support needs and identifies the supports a person with IDD needs to advocate for themselves.
- Data analysis confirms that the SIS-A remains a valid assessment of support needs among adults with IDD up to age 84.
- The *Employment Activities* scale is renamed *Work Activities* to clarify that its focus is on support needed to engage in meaningful work activities across the adulthood and is applicable to older adults who may have retired from the workforce.
- The reorganization of some sections, scales, and items makes the interview more efficient and flow more smoothly.
- Minor edits in the wording and phrasing of headings and instructions provide greater clarity for users.

### **11. Do these enhancements change the normed items in the SIS-A?**

No. These edits have no impact on how any of the normed items themselves are worded, described, or scored.

### **12. Does changing the order of scales or items with a scale affect the validity of the SIS-A?**

No. Each scale in the SIS-A focuses on one life activity area. While interviewers must conduct the assessment one scale at a time, the order in which the scales—or the items within a scale—are conducted does not affect the validity of the SIS-A.

**13. Do these enhancements make any sections of the SIS-A optional?**

No. All sections of the SIS-A are required. The SIS-A is a standardized assessment conducted using a uniform procedure to identify the unique support needs of the person being assessed.

In standardized assessment items cannot be skipped. During the SIS-A respondents are asked to envision the type, frequency, and daily support time a person would need for various life activities. The items cannot be skipped just because the person does not regularly engage in a particular activity (and may have no intention of becoming regularly engaged) in the activity. The SIS-A examines the pattern and intensity of the individual's support needs. An individual support plan addresses the supports provided to help the person achieve their personal goals.

**14. Why was *Communication* added to the section on exceptional medical and behavioral support needs?**

The open-ended item was added to identify what additional exceptional supports are needed to enable a person to communicate. Just as exceptional medical and behavioral needs are important to consider when assessing the intensity of support people need across multiple life activities, recognizing exceptional supports needed for communication is critical to participating in every domain of life.

**15. Why is the *P&A* scale being incorporated into the SNI, and why is the name of the scale changing?**

The supplemental *P&A* scale did not contribute to the SNI in the first edition because it was not normed. Today, not only are norming data available, but analysis confirms that this scale measures people's support needs in a valid and reliable way and contributes unique information to the overall SNI score. The scale is renamed the *Advocacy Activities* scale to better reflect the agency of the individual assessed.

## Training and Materials

**16. Will these updates change AAIDD's SIS-A training or quality-assurance activities?**

AAIDD is constantly updating and improving its training and quality-assurance activities. As the second edition of the SIS-A is launched in early 2023, AAIDD's training and quality-assurance activities will continue to address the contents of the assessment.

**17. Will there be an updated User's Manual and Interview Profile Form?**

Yes. The second edition of the SIS-A will consist of both print and electronic materials that reflect the enhancements described in this memo. AAIDD expects to launch the second edition of the SIS-A in early 2023. AAIDD plans to continue to support the current (first edition) SIS-A assessment and SISOnline for approximately 18 months after the release of the second edition and will assist users in transitioning to the new SISOnline during that period.

**18. Will there be an updated SISOnline?**

Yes. An updated version of the SISOnline will be launched along with the second edition of the SIS-A. This version of the SISOnline will calculate standard scores and generate reports that reflect the new norms.

AAIDD plans to continue to support the current (first edition) SIS-A assessment and SISOnline for approximately 18 months after the release of the second edition and will assist users in transitioning to the new SISOnline during that period. During this 18-month period, AAIDD will maintain two versions of the SISOnline so users can continue to use the SIS-A's current norms as they prepare to transition to the second edition.

## Norming

**19. Why is the SIS-A being re-normed?**

All standardized norm-referenced assessments must be periodically re-normed to make sure that a person's scores are compared against those of a group of their present-day peers. It is simply time for the SIS-A to be re-normed, as it was originally normed on a sample from over 20 years ago.

**20. Did the decision to re-norm the SIS-A have anything to do with virtual assessments?**

No, the decision to re-norm was made and the analysis begun before the start of the pandemic. The use of the virtual interview format began after the start of the pandemic.

**21. Does updating the norms mean that the current norms are wrong or that the assessment is no longer valid?**

No. The SIS-A and its current norms still provide a valid means to measure support needs, but norms lose precision over time, so they must be updated periodically. The updated norms allow a meaningful comparison between a person and the IDD population of today. Re-norming is an important part of keeping an assessment current, and currency is important to maintaining construct validity.

**22. What is norming (or re-norming)?**

Norming is the process of collecting a representative sample of a target population’s support needs, determining the range and average support needs of the sample, and creating a way to compare a single person’s support needs against those of the sample.

Norming helps us understand a person’s support needs in comparison with those of others who are similar to them. For example, a third grader’s math achievement is reported as a percentile when it is compared to the math skills of other third grade students. Periodically, the norming process must be repeated with new samples to make sure that assessments continue to compare a person’s scores against those of their peers today and not against those of an earlier generation.

**23. How was the SIS-A re-normed?**

Data from a large sample of actual SIS-A assessments conducted by trained assessors between 2017 and 2020 were analyzed. The sample consisted of over 100,000 assessment records of people with IDD from 19 states or jurisdictions. This sample included assessment data of people with IDD who participated in HCBS waiver services. In accordance with best practices in psychological testing and measurement, sophisticated statistical techniques associated with modern test theory, factor analysis, structural equation modeling, and multivariate analysis were used to analyze data and develop the norms for the second edition of the SIS-A.

**24. Does the SIS-A provide different norms for different age groups?**

No. The SIS-A is an assessment designed for use with adults, and a single set of norms is used to generate standard scores for adults. In contrast, the Supports Intensity Scale-Children’s Version® (SIS-C®) has norms for different age groups.

<b>Acronyms</b>	
AAIDD	American Association on Intellectual and Developmental Disabilities
HCBS	Home and Community Based Services
IDD	Intellectual and Developmental Disabilities
FAQ	Frequently Asked Questions
P&A	Protection and Advocacy
SIS	Supports Intensity Scale
SIS-A	Supports Intensity Scale-Adult Version
SIS-C	Supports Intensity Scale-Children’s Version
SISOnline	SIS online scoring platform
SNI	Support Needs Index