



# Ticket To Work Medicaid Infrastructure Grant Report

## Basic Information

<b>Grant Number</b>	11-P-92415-0/03
<b>Lead Agency</b>	Department of Human Services
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<b>Basic Description</b>	The Oregon Competitive Employment Project seeks to enhance the quality of life in Oregon by achieving, maintaining and advancing the competitive and inclusive employment of persons with disabilities. The project is funded by a four-year Medicaid Infrastructure Grant from the Centers for Medicare and Medicaid Services, and is part of the Oregon Department of Human Services, Office of Vocational Rehabilitation Services.

## Major Outcomes

### Outcome 1

#### Workplan outcome

Increase supported employment by 12/31/2007 of: A) Yearly total of people with serious/persistent mental illness entering competitive employment (CE) by 5% from a baseline of 70 to 74. (Baseline data source: 2006 MIG/MH contract fidelity reports). B) Yearly total of people with a developmental disability entering CE by 4% from a baseline of 144 to 150. (Baseline data

	source:VR ORCA data system 2006 report). C) Yearly total of people with acquired/traumatic brain injury entering CE by 2.5% from a baseline of 74 to 76. (Baseline data source: VR ORCA data system 2006 report).
<b>Primary Strategy</b>	Promote development of evidence-based supported employment to the following historically underserved populations: People with serious and persistent mental illness; People with a developmental disability; and People with acquired/traumatic brain injury.
<b>Strategy 1</b>	Continue to contract with a maximum of 7 County Mental Health agencies and 2 private contractors to obtain training/technical assistance through a "center of excellence" developed through MH state and county partnership; develop and sustain collaborative relationships with VR; strengthen infrastructure in provision of SE evidence-based practices in a maximum of 9 Oregon counties; monitor progress of deliverables and performance indicators through quarterly fidelity reports through 12/31/07.
<b>Strategy 2</b>	Participate in DD Supported Employment Leadership Network (SELN) Oregon Workplan initiatives related to: DD Employment Vision and Policy; create formal interagency agreement for partnership between DD and VR; expand local DD SE Teams and provide support for training and technical assistance on revised SE Guideline toolkit as requested by teams; improve data collection for DD/VR participants entering competitive employment by 12/31/07.
<b>Strategy 3</b>	Create infrastructure and workplan for implementation for statewide Job Developer Academy that cross cuts disabilities by 12/31/07.
<b>Strategy 4</b>	Identify and test tools (including Brain Injury Recovery Kit/tm: "BIRK") with VR Counselors and other professional staff that can be used to strengthen employment outcomes for persons with TBI and provide training and technical assistance on chosen tools by 12/31/07.
<b>Strategy 5</b>	Collaborate with agencies and departments to investigate mechanisms to provide SE to people with TBI including DRA SPA and HCBS waiver by 12/31/2007.
<b>Funds Budgeted Annually to Outcome</b>	\$188,252.17
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	Held "Kick-Off" event for evidence-based MHSE; Completed SELN Oregon plan; Convened workgroup to revise DD/VR SE Guideline Toolkit; 1 BIRK purchased/clinical trials begun in one pilot area with VR Clients; Created/began implementation on Job Developer Academy survey.
<b>Problems/Issues</b>	None in this quarter.
<b>Status</b>	On schedule
<b>Actual Completion Date</b>	

**Outcome 2**

<b>Workplan outcome</b>	Increase the yearly total of people with disabilities receiving benefits and work incentives planning services and supports needed to achieve their desired employment outcomes by 5% from a baseline of 661 to 694 by December 31, 2007. (Baseline data source: 2006 Work Incentives Planning and Assistance (WIPA)/Benefits Planning Assistance and Outreach (BPAO) client count) .
<b>Primary Strategy</b>	Develop and promote a statewide comprehensive benefits and work incentives planning system (The Work Incentives Network: WIN) that provides information, services and supports for persons with disabilities who wish to achieve, maintain or advance competitive employment outcomes.
<b>Strategy 1</b>	Hire WIN system coordinator by May 31, 2007.

<b>Strategy 2</b>	Identify regional placement areas; develop contracts that include a quality assurance and management plan with regional Centers for Independent Living (CIL) to hire and complete training for 4 benefits counselors and 6 information and referral specialists by September 28, 2007, provide functional supervision and monitor contracts through random plan sampling, monthly and quarterly reports, scheduled meetings, and other contract deliverables and performance indicators.
<b>Strategy 3</b>	Develop three-tiered training curriculum by July 31, 2007: a 1 day general overview; 2-3 day intensive for professional staff and 5-10 day training for benefits counselors and information and referral specialists; provide intensive 5-10 day training by September 28, 2007; provide ongoing 1 day general overview for general public and 2-3 day intensive for professional staff by October 8, 2007.
<b>Strategy 4</b>	Develop a data collection system by September 28, 2007 to measure employment outcomes of people who receive benefits counseling through both MIG and WIPA systems in partnership with WIPA and offices/divisions within OR Department of Human Services via formal memorandum of understanding/interagency agreement.
<b>Strategy 5</b>	Complete business case and implement revised and sustainable on-line benefits calculator (Workbenefits.org) by May 30, 2008.
<b>Funds Budgeted Annually to Outcome</b>	\$198,032.63
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	MIG staff went to VT for training & to acquire data collection system; presented benefits counseling system concept to: Administrators & Program Mgrs. @ OR Dept. of Human Svcs. Seniors & Persons with Disabilities, Addictions & MH, TANF/Self-Sufficiency, VR; @ 3 VR offices, & 2 new Counselor trainings.
<b>Problems/Issues</b>	None at this time
<b>Status</b>	On schedule
<b>Actual Completion Date</b>	

**Outcome 3**

<b>Workplan outcome</b>	Increase the number of businesses who have demonstrated their commitment to increasing employment of people with disabilities through their formal affiliation with the Oregon Business Leadership Network (OBLN) by 5% from a baseline of 40 to 42 by December 31, 2007. (Baseline data source: OBLN business affiliates list, www.obln.org)
<b>Primary Strategy</b>	Develop and implement a comprehensive education and marketing strategy to support and promote employment of persons with disabilities based on the business needs of employers and the OBLN business case for competitive and inclusive employment of persons with disabilities.
<b>Strategy 1</b>	Provide fiscal and programmatic support to OBLN for planning and implementation of a Career Exploration/Job Fair day to market to and increase the numbers of businesses educated about the benefits of hiring persons with disabilities ages 16 through 64; and to offer persons with disabilities ages 16 through 64 increased employment opportunities by November 13, 2007.
<b>Strategy 2</b>	Develop on-camera educational video spots designed to educate and market to businesses the benefits of participating in Summer Internship programs by April 30, 2007.
<b>Strategy 3</b>	Develop on-camera marketing video designed to educate and market to businesses the benefits of hiring people with disabilities by July 1, 2007.

<b>Strategy 4</b>	Develop/disseminate 3 brochures by July 1, 2007: Educational/marketing tool to businesses regarding the benefits of OBLN membership; Educational/marketing tool to businesses on the benefits of Universal Design in increasing customer base and for all employees; and Educational/marketing tool to employers on possible national and state specific benefits including Medicaid Buy-In health insurance available to businesses and persons with disabilities when hiring or being hired.
<b>Strategy 5</b>	Research self-sustainable strategies for BLNs nationwide in partnership with Centers for Workers with Disabilities and identify those that could be adopted by OBLN by August 30, 2007.
<b>Funds Budgeted Annually to Outcome</b>	\$143,520.70
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	Completed rough cut of "Are You Ready to Look at Ability" marketing video; Attended networking January event "Celebration of Business" with over 50 business represented; completed rough draft of template for educational/marketing brochure.
<b>Problems/Issues</b>	None in this quarter
<b>Status</b>	On schedule
<b>Actual Completion Date</b>	

**Outcome 4**

<b>Workplan outcome</b>	Increase number of students receiving education/information and referral for employment opportunities by December 31, 2007 by: A) Increasing number of trained IEP Transition Peer Support Partners providing information in transition meetings that lead to employment opportunities for students by 100% from 7 to 14 by 12/31/07. (Baseline data source: 2006 OrPTI contract reports) B) Increasing number of students with person-centered employment plans who gained employment by 200% from 2 to 6 by 12/31/07. (Baseline data source: OCDD & CTCC contract reports).
<b>Primary Strategy</b>	Increase the awareness, understanding and knowledge that youth and adults-in-transition, families, teachers and disability professionals have of transition processes, transition planning and available supports and services after graduation/exiting high school.
<b>Strategy 1</b>	Continue to contract with Oregon Parent Training and Information Center to provide and refine as needed training focusing on employment opportunities and supports and services sources after high school for peer support partners ("IEP Partners"); monitor progress of contractual agreement including deliverables and performance indicators including how many IEP partners provided peer support in transition meetings through 12/31/2007
<b>Strategy 2</b>	Continue to contract with Oregon Council on Developmental Disabilities to provide a train-the-trainer model to 3 interagency collaborative regional groups including DOE, DD, MH, VR and others on effective person-centered employment plans for students in transition; provide training to a minimum of 60 students and family/support members; develop a trainer's manual by 12/10/07; monitor contractual agreement including number gaining employment after completion of training through 12/31/2007.
<b>Strategy 3</b>	Provide Community Center Transition Campus Program (CTCC) with mini-grant to increase marketable work skills of students with severe disabilities in Portland area who have person-centered employment transition plans by 4/31/07; monitor grant progress through number of identified students entering competitive employment after graduation.
	Provide training and technical assistance to regional Voc Rehab offices on

<b>Strategy 4</b>	transitioning students with severe disabilities into competitive employment through 12/31/2007.
<b>Strategy 5</b>	Co-sponsor/planner, facilitate and present at pre-conference "Benefits Planning for High School Youth in Transition" day at statewide Secondary Transition Conference, 5/14/07; co-sponsor statewide Secondary Transition Conference "Building Futures" for students, families, support teams, professional staff and other stakeholders 5/15 and 16/07.
<b>Funds Budgeted Annually to Outcome</b>	\$115,661.60
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	Held initial meeting on 2/8/07 w/ Special Education Administrator, Youth Transition Manager and VR Administrator on providing collaborative supports/services; Presentation for Portland Public Schools Transition Specialists on MIG and High School Transition efforts on 2/13/07.
<b>Problems/Issues</b>	None in this quarter
<b>Status</b>	On schedule
<b>Actual Completion Date</b>	

**Outcome 5**

<b>Workplan outcome</b>	Increase total average annual number of rides for persons with disabilities by 50% from 8 to 12 in targeted rural communities through the increased availability of transportation services and supports such as coordinated rideshare programs, enhanced transportation brokerages and/or expansions in voucher programs, thereby increasing opportunities to achieve, maintain and advance competitive employment opportunities by 12/31/2008. (Baseline data source: Oregon Department of Transportation (ODOT) 2006 Public Transit Division Transportation Provider report).
<b>Primary Strategy</b>	Assist and support Oregon Department of Transportation (ODOT) and 3 rural communities in implementing and sustaining one or more initiatives from their Safe, Accountable, Flexible Efficient Transportation Equity Act-A Legacy for Users' (SAFETEA-LU) Human Service Coordinated Transportation Plans to expand transportation capacity to promote competitive employment for people with disabilities.
<b>Strategy 1</b>	Contract with ODOT to provide assistance to 5 rural Oregon counties to develop SAFETEA-LU plans with enhanced sections on provision of transportation to people with disabilities seeking, attempting to maintain or advance employment through 5/31/2007.
<b>Strategy 2</b>	In collaboration with United We Ride workgroup review all 5 plans and choose 3 for continued support to implement sections on provision of transportation to people with disabilities seeking, attempting to maintain or advance employment; write specific contract deliverables that address development of increased availability of transportation services and supports by July 1, 2007.
<b>Strategy 3</b>	In collaboration with United We Ride workgroup monitor progress of implementation through contract deliverables and other performance indicators through December 31, 2008.
<b>Strategy 4</b>	
<b>Strategy 5</b>	
<b>Funds Budgeted Annually to Outcome</b>	\$59,544.07
<b>Planned Completion Date</b>	12/31/2008
	Coordinated to revise initial MIG/ODOT contracts (there was delay in ODOT

<b>Accomplishments</b>	start of project) and were able to stay on schedule for implementation of 2nd phase 7/1/2007.
<b>Problems/Issues</b>	None in this quarter
<b>Status</b>	On schedule
<b>Actual Completion Date</b>	

**Outcome 6**

<b>Workplan outcome</b>	Increase use of following work incentives by 12/31/2007: A) Ticket to Work by VR, TANF, DD and MH clients by 25% from 234 to 293 by 12/31/07 (Baseline data source: Maximus SSA Assignment Detail report 2007). B) Plans for Achieving Self-Support (PASS) and Impairment Related Work Expense (IRWE) by 10% from 67 to 74 (Baseline data source: SSA SSI Disabled Recipients Who Work 2006 report). C) Increase accuracy/timeliness of EPD premium payments to reach the 88.6% benchmark established in pilot area from 59.3% statewide average by 12/31/2007. (Baseline data source: EPD Monthly Premium report)
<b>Primary Strategy</b>	Develop and promote policies and practices that increase the usefulness, effectiveness and availability of work incentives and work incentive programs, and that lessen or eliminate disincentives to work.
<b>Strategy 1</b>	Provide technical assistance to Seniors and Persons with Disabilities staff for graduated phase-in of EPD premium payment pilot program through 12/31/2007.
<b>Strategy 2</b>	Provide technical assistance and programmatic support to VR in creation of standardized TTW program through 12/31/2007.
<b>Strategy 3</b>	Provide training to participants, professional staff and other stakeholders on work incentives including TTW, EPD, PASS and IRWEs through 12/31/2007.
<b>Strategy 4</b>	Provide assistance to participants receiving benefits counseling through MIG system with writing PASS and IRWE plans through 12/31/2007.
<b>Strategy 5</b>	Continue participation on EPD policy revision workgroup through 12/31/2007.
<b>Funds Budgeted Annually to Outcome</b>	\$35,230.83
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	Facilitated the provision of information and training from John Halliday, CESSI consultant on TTW to VR, DD, TANF and MH staff 2/26/2007; continued participation on EPD policy revision workgroup; generated premium tracking letters for all individual EPD participants in pilot area on monthly basis.
<b>Problems/Issues</b>	None in this quarter.
<b>Status</b>	On schedule
<b>Actual Completion Date</b>	

**Outcome 7**

<b>Workplan outcome</b>	Create outcome tracking system
<b>Primary Strategy</b>	Compile and analyze data and information from medicaid, vocational rehabilitation, office of mental health and addiction services, worker's compensation, and the employment department to track grant outcomes.
<b>Strategy 1</b>	
<b>Strategy 2</b>	

<b>Strategy 3</b>	
<b>Strategy 4</b>	
<b>Strategy 5</b>	
<b>Funds Budgeted Annually to Outcome</b>	\$0.00
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	N/A
<b>Problems/Issues</b>	This Outcome has been moved to Research and Evaluation
<b>Status</b>	Abandoned
<b>Actual Completion Date</b>	

**Outcome 8**

<b>Workplan outcome</b>	A) Identify the strengths, weaknesses, and gaps in Oregon's system of employment services in serving and supporting Oregonians with disabilities who are ethnic or cultural minorities. B) Develop and promote policies and practices that increase access to and the availability of needed, appropriate and competent services. C) Fund one or more replicable initiative that increases accessibility to and availability of needed culturally appropriate and competent employment services and supports.
<b>Primary Strategy</b>	Increase the accessibility and availability of culturally appropriate and competent employment services and supports to Oregonians with disabilities who are ethnic or culturally minorities.
<b>Strategy 1</b>	After discussion with Ascellon, OR determined that this Outcome was not quantifiable as currently stated. MIG staff are in discussion with Leadership Council members on how to restructure this Outcome. Due to the fact that the Outcome as stated is so broad the MIG has been unable to locate someone with the background and credentials who could author a comprehensive white paper on this subject.
<b>Strategy 2</b>	
<b>Strategy 3</b>	
<b>Strategy 4</b>	
<b>Strategy 5</b>	
<b>Funds Budgeted Annually to Outcome</b>	\$0.00
<b>Planned Completion Date</b>	12/31/2008
<b>Accomplishments</b>	N/A
<b>Problems/Issues</b>	The MIG and Leadership Council members still wish this to be a separate Outcome and not built in as a part of the other outcomes in this report. Once we have determined how to address this issue in a quantifiable manner we will re-add it to Outcome list.
<b>Status</b>	Abandoned
<b>Actual Completion Date</b>	

**Consumer Involvement**

**Consumer 1**

<b>Name of Group</b>	Leadership Council
<b>Role</b>	Exists solely to interact with and on behalf of the Project
<b>Relationship to Grant</b>	Provide the Project with advice and direction
<b>Percent of Members with a Disability</b>	40.00%
<b>Hours Spent Last Quarter (Approximate)</b>	70

**Consumer 2**

<b>Name of Group</b>	People with Disabilities Advisory Council
<b>Role</b>	Consumer council responsible for advising state Seniors and Persons with Disabilities agency
<b>Relationship to Grant</b>	Partners and stakeholders
<b>Percent of Members with a Disability</b>	100.00%
<b>Hours Spent Last Quarter (Approximate)</b>	3

**Consumer 3**

<b>Name of Group</b>	CORIL, DASIL, EOCIL, ILR, LILA, State Independent Living Council
<b>Role</b>	Centers for Independent Living
<b>Relationship to Grant</b>	Partners and stakeholders
<b>Percent of Members with a Disability</b>	75.00%
<b>Hours Spent Last Quarter (Approximate)</b>	5

**Consumer 4**

<b>Name of Group</b>	Adult Services Advisory Committee
<b>Role</b>	Advise Office of Mental Health and Addiction Services
<b>Relationship to Grant</b>	Partners and stakeholders
<b>Percent of Members with a Disability</b>	50.00%
<b>Hours Spent Last Quarter (Approximate)</b>	0

**Consumer 5**

<b>Name of Group</b>	Developmental Disabilities Supported Employment Committee
<b>Role</b>	Independent committee comprised of various developmental disability advocacy, consumer, professional and provider groups seeking to revitalize state's DDSE efforts
<b>Relationship to Grant</b>	Serving as project workgroup
<b>Percent of Members with a Disability</b>	8.00%



**Hours Spent Last Quarter  
(Approximate)**

80

**Consumer 6**

**Name of Group**

Oregon Dept of Transportation United We Ride Committee

**Role**

Advises ODOT about transportation issues related to persons with disabilities

**Relationship to Grant**

Serving as Project workgroup on transportation strategy and activities

**Percent of Members with a  
Disability**

5.00%

**Hours Spent Last Quarter  
(Approximate)**

0

**Consumer 7**

**Name of Group**

Benefits Planning Workgroup &amp; Design Team

**Role**

Assisting Project plan and implement BP strategy and activities. Project-established group and team (includes Project Leadership Council members and others)

**Relationship to Grant**

Project workgroup

**Percent of Members with a  
Disability**

33.00%

**Hours Spent Last Quarter  
(Approximate)**

66

**Consumer 8**

**Name of Group**

Employed Persons with Disabilities: EPD (Oregon's Medicaid Buy-In) WorkGroup

**Role**

Advises Department of Human Services Seniors and Persons with Disabilities on revisions to EPD policy and procedures; group that includes Project Leadership Council members and MIG staff.

**Relationship to Grant**

Partners and stakeholders

**Percent of Members with a  
Disability**

14.00%

**Hours Spent Last Quarter  
(Approximate)**

6

**Consumer 9**

**Name of Group**

Employer Engagement Workgroup

**Role**

Assisting Project plan and implement employer engagement and education strategy

**Relationship to Grant**

Project Workgroup

**Percent of Members with a  
Disability**

25.00%

**Hours Spent Last Quarter  
(Approximate)**

40

## Research and Evaluation

### Research 1

<b>Report/Study Name</b>	Centers for Workers with Disabilities (CWD) Report: Florida's Freedom Initiative
<b>Brief Description</b>	CWD in-depth study of FLA's Freedom Initiative and SSA 2 for 1 demonstration states in order for Oregon to weigh viability for utilization
<b>Status</b>	Completed
<b>Report Location</b>	<a href="http://cwd.aphsa.org/Home/docs/CWD_Florida_Freedom_Initiative.pdf">http://cwd.aphsa.org/Home/docs/CWD_Florida_Freedom_Initiative.pdf</a>
<b>Brief Summary of Findings</b>	The Florida Freedom Initiative combined SSI waivers w/ Florida's Cash and Counseling Medicaid waiver. Enrollment was lower than initially projected. States looking to implement similar programs might consider a smaller pilot project and/or integrating with a broader range of additional supports.

### Research 2

<b>Report/Study Name</b>	EPD Monthly Enrollment Report
<b>Brief Description</b>	Report using monthly pulls from the mainframe system to track Buy-in enrollment
<b>Status</b>	Ongoing
<b>Report Location</b>	Not posted publically due to confidentiality. Contact <a href="mailto:damon.terzaghi@state.or.us">damon.terzaghi@state.or.us</a> for more information.
<b>Brief Summary of Findings</b>	80% of EPD population remains on the program for 1+ year. Program enrollment fluctuates monthly by less than 3%.

### Research 3

<b>Report/Study Name</b>	EPD Monthly Eligibility Report
<b>Brief Description</b>	Identifies people enrolled in EPD who might be better served by other eligibility categories
<b>Status</b>	Ongoing
<b>Report Location</b>	Not posted publically due to confidentiality. Contact <a href="mailto:damon.terzaghi@state.or.us">damon.terzaghi@state.or.us</a> for more information
<b>Brief Summary of Findings</b>	Persons categorically eligible for Medicaid with no liability (eg: SSI recipients) should not be charged an EPD client contribution. This report identifies individuals who meet categorical eligibility.

### Research 4

<b>Report/Study Name</b>	EPD Monthly Premium/Report
<b>Brief Description</b>	Tracks owed premiums/paid premiums by participants in the Buy-in. Tracks results of targeted outreach regarding client contributions owed.
<b>Status</b>	Ongoing
<b>Report Location</b>	Not posted publically due to confidentiality. Contact <a href="mailto:damon.terzaghi@state.or.us">damon.terzaghi@state.or.us</a> for more information
<b>Brief Summary of Findings</b>	Targeted outreach increased timeliness and accuracy of client contributions.

**Research 5**

<b>Report/Study Name</b>	Medicaid Employment Rates for Enrollees with Serious Mental Illness
<b>Brief Description</b>	Used Medicaid and Unemployment Insurance Data to track employment of individuals with mental illness from 2000-2005
<b>Status</b>	Ongoing
<b>Report Location</b>	Report is currently in Draft form. Contact <a href="mailto:damon.terzaghi@state.or.us">damon.terzaghi@state.or.us</a> for more information
<b>Brief Summary of Findings</b>	Employment rate of individuals with serious mental illness decreased from 2001-2003 during recession. Employment rates in counties implementing Evidence-Based Supported Employment projects indicate a positive upward trend as projects develop. More analysis of EBSE and employment rates is necessary.

**Research 6**

<b>Report/Study Name</b>	Outcome tracking system
<b>Brief Description</b>	A fully integrated data system containing information from Medicaid, VR, DD, MH and the employment department relevant created to provide quality tracking of grant outcomes.
<b>Status</b>	Ongoing
<b>Report Location</b>	N/A
<b>Brief Summary of Findings</b>	In progress

**Research 7**

<b>Report/Study Name</b>	Oregon DHS Ofc. of Information Technology & MIG Business Case for Benefits Planning Technology Investment
<b>Brief Description</b>	Business case will outline need for & purpose of revision of Oregon's current online benefits calculator, <a href="http://Workbenefits.org">Workbenefits.org</a> ; provide alternatives for revision of calculator to make it more accessible to users including professional benefits counselors & cost projections for sustainability of system.
<b>Status</b>	Ongoing
<b>Report Location</b>	N/A
<b>Brief Summary of Findings</b>	In progress

**State Plan PAS**

<b>State Plan PAS for Adults with Disabilities</b>	Yes
<b>Location</b>	Outside, including job site
<b>Hours Allowed Per Month</b>	Less than 40
<b>Population Limited To (List)</b>	OSIPM, OHP, GA
<b>Included Services (List)</b>	Provide assistance in eating, dressing, bathing/personal hygiene, mobility, bowel/bladder, contract RN svcs.
<b>Are PAS Consumer Directed</b>	Yes
<b>Number Served with Mental Illness</b>	593

**Number Served with Developmental Disabilities**  
**Number Served with Physical Disabilities**  
**PAS by Waiver(s) for Adults with Disabilities**

840
953
Yes

## PAS by Waiver

### PAS Waiver 1

**Brief Description of State Plan**  
**State Plan Number**  
**Is Waiver Statewide**  
**Does Waiver Include Buy-In**  
**Is This an Independence Plus Waiver**  
**Location**  
**Hours Allowed Per Month**  
**Population limited To (List)**  
**Included Services (List)**  
**Are PAS Consumer Directed**  
**Number Served with Mental Illness**  
**Number Served with Developmental Disabilities**  
**Number Served with Physical Disabilities**

Support Services (643)
0375
Yes
Yes
No
Outside, including job site
Unlimited, based on need
ICF/MR Population
(PAS limited by dollar amount NOT hours) Provide assistance in eating, dressing, bathing/personal hygiene, mobility, bowel/bladder, cognition, medications/oxygen. 24-hr care availability, contract RN svcs.
Yes
3478

### PAS Waiver 2

**Brief Description of State Plan**  
**State Plan Number**  
**Is Waiver Statewide**  
**Does Waiver Include Buy-In**  
**Is This an Independence Plus Waiver**  
**Location**  
**Hours Allowed Per Month**  
**Population limited To (List)**  
**Included Services (List)**  
**Are PAS Consumer Directed**  
**Number Served with Mental**

Aged and Physically Disabled Waiver
0185.90 R2
Yes
Yes
No
Outside, including job site
Unlimited, based on need
Seniors and persons with physical disabilities
Provide assistance in eating, dressing, bathing/personal hygiene, mobility, bowel/bladder, cognition, medications/oxygen. 24-hr care availability, contract RN svcs.
Yes

**Illness**

**Number Served with  
Developmental Disabilities**  
**Number Served with Physical  
Disabilities**

28222

**PAS Waiver 3**

**Brief Description of State Plan**

ICF/MR 1915C Waiver--Comprehensive Waiver (640)

**State Plan Number**

0117.90.R7

**Is Waiver Statewide**

Yes

**Does Waiver Include Buy-In**

Yes

**Is This an Independence Plus  
Waiver**

No

**Location**

Outside, including job site

**Hours Allowed Per Month**

Unlimited, based on need

**Population limited To (List)**

ICF/MR Population

**Included Services (List)**

(PAS limited by dollar amount NOT hours) Provide assistance in eating, dressing, bathing/personal hygiene, mobility, bowel/bladder, cognition, medications/oxygen. 24-hr care availability, contract RN svcs.

**Are PAS Consumer Directed**

Yes

**Number Served with Mental  
Illness**

**Number Served with  
Developmental Disabilities**

5733

**Number Served with Physical  
Disabilities**

**Buy-In**

**Buy-In Status**

Adopted the buy-in

**Program Name**

Employed Persons with Disabilities (EPD)

**Implementation Date**

2/1/1999

**State Legislative Authority**

N/A

**Federal Authority**

Balanced budget act of 1997

**Income Eligibility**

Up to 250% FPL

**Income Eligibility (Other)**

N/A

**Countable Income for  
Eligibility**

Gross (before taxes)

**Does Countable Income for  
Eligibility Include Spousal  
Income**

No

**Method for Counting Earned  
Income**

Other (specify below)

**Method for Counting Earned  
Income (Other)**

Use SSI methodology + allow Empl & Indep expenses

**Method for Counting**

<b>Unearned Income</b>	Other (specify below)
<b>Method for Counting Unearned Income (Other)</b>	Excluded for eligibility; counted for contribution
<b>Web Site for Additional Information</b>	http://egov.oregon.gov/DHS/spwpd/empserv.shtml#epd
<b>Work Requirement</b>	Must be attached to the workforce (defined as earning at least \$1000 per calendar quarter)
<b>Resource (Asset) for Individual Limit - Enter 2000, or Other Amount</b>	5000
<b>Resource Limit Includes Spousal Resources</b>	No
<b>Additional Savings Accounts are excluded</b>	Yes
<b>Additional Savings Accounts are Portable (After Leaving the Buy-In)</b>	No
<b>Cost-Sharing Policy</b>	Other (specify)
<b>Cost-Sharing Policy (Other)</b>	Unearned \$ above maintenance standard paid monthly
<b>Premium Payments Begin At</b>	Other (specify)
<b>Premium Payments Begin At (Other)</b>	After 6 months, above \$2200
<b>Method to Calculate Monthly Premiums, Co-Pays, or Other Cost Sharing</b>	Gross income plus any unearned income remaining after cost-share is paid, subtract: 1) mandatory taxes for an allowance of one; 2) approved employment and independence expenses; and, 3) 200% of the federal poverty level. Multiply remainder by 2% to 10%
<b>Medicaid Eligibility Review</b>	Other (specify)
<b>Medicaid Eligibility Review (Other)</b>	Based on stability of emp. not to exceed 12 mos
<b>Enrollees at Beginning of Year</b>	593
<b>Enrollees at Beginning of Year MI</b>	
<b>Enrollees at End of Quarter</b>	605
<b>Enrollees at End of Quarter MI</b>	
<b>Major Outreach Activities (Up to 3)</b>	case managers at local level; local benefits planners; supported employment specialists

## Technical Assistance Outcomes

### TA Outcome 1

<b>TA Outcomes</b>	General Technical Assistance
<b>Strategy</b>	Provide TA, review and analysis, share promising practices, facilitate state-to-state partnerships, assist with identification/evaluation of opportunities to maximize a coordinated employment infrastructure.
<b>Provider</b>	NCHSD, CWD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007

<b>Accomplishments</b>	NCHSD provided on-site TA for 1/07 VT visit; NCHSD and CWD provided detailed TTW info from other states; NCHSD facilitated/hosted Employer Engagement mtg & hosted Florida BLN presentation at CMS conference; CWD provided information on new and upcoming Medicaid programs/regulations and DRA.
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 2**

<b>TA Outcomes</b>	Resource Mapping
<b>Strategy</b>	Develop customized process and tools to identify gap and strengths in state and local systems; assist with product development and stakeholder support.
<b>Provider</b>	NCHSD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007
<b>Accomplishments</b>	NCHSD provided technical/design assistance w/ matrix showing challenges/opportunities in providing services in OR/ how benefits planning could help; provided TA in design and content of OBLN universal access brochure for employers; provided TA and tool "Approaches to Resource Mapping".
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 3**

<b>TA Outcomes</b>	Implementing Federal and Employment Policy
<b>Strategy</b>	Provide information and resources on impact on workers of DRA, new TTW regs and Part D; support successful implementation of policy changes.
<b>Provider</b>	NCHSD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007
<b>Accomplishments</b>	Health and Disability Advocates/NSCHD staff chosen to coordinate ODEP State Policy Exchange; nominated OR to participate in this effort; OR participated in NCHSD teleconference 2/07 on Working with One-Stops detailing innovative ways that CT and MD have changed policy to improve systems.
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 4**

<b>TA Outcomes</b>	Employer Education and Marketing
<b>Strategy</b>	Review current processes in place to identify and measure employer/business needs; facilitate CMS/state partnerships.
<b>Provider</b>	NCHSD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007

**Accomplishments**

NCHSD provided technical/design assistance/content for OBLN/VR brochure; facilitated 3/7/07 state-to-state initial/follow-up task force meetings w/ 7 state MIGs on employer engagement strategies; hosted/facilitated presentation by Florida BLN on successful strategies at CMS 3/07 national conference.

**Problems**

None in this quarter.

**Status**

On schedule

**TA Outcome 5****TA Outcomes**

Employer Strategies for People with Mental Illness

**Strategy**

Share info on evidence-based national best practices; on NASMD's Medicaid & MH Center; strategize opportunities for increased funding for MH Voc Services; assist in efforts to transition from day treatment to SE and new laws/federal regulations affecting MH-Medicaid programming and policy.

**Provider**

NCHSD, CWD

**Planned Completion Date**

12/31/2007

**Actual Completion Date**

12/31/2007

**Accomplishments**

Information shared to date: MH integration in schools; various SAMSHA initiatives and grants including new Evidence-Based Practice Database; MH Parity Act of 2007; CMS Biennial Report: MH US 2004.

**Problems**

None in this quarter.

**Status**

On schedule

**TA Outcome 6****TA Outcomes**

Research and Evaluation Initiatives

**Strategy**

Assist w/research & eval planning; support cross-state sharing/comparisons; provide examples of data collection tools; assist with MIG reporting obligations; collaborate w/ MIGRATS

**Provider**

NCHSD, CWD

**Planned Completion Date**

12/31/2007

**Actual Completion Date**

12/31/2007

**Accomplishments**

CWD doing research on sustainability of BLNs; provided Buy-In info; completed paper SSI 2/1 for OR/shared w/other states; CWD & NCHSD provided TA on OR CMS quarterly report; NCHSD provided strategies for data sharing w/WIPA for BP system; NCHSD participated in 2/07 MIGRATS call/Benefits Planning.

**Problems**

None in this quarter.

**Status**

Completed

**TA Outcome 7****TA Outcomes**

Collaborating with Vocational Rehabilitation

**Strategy**

Identify opportunities for collaboration, outreach, training & increased funding; support efforts to access & utilize RSA-911 data in research activities.

**Provider**

NCHSD

**Planned Completion Date**

12/31/2007

**Actual Completion Date**



	12/31/2007
<b>Accomplishments</b>	NCHSD provided strategies to utilize RSA-911 data in research/reporting; provided TA on planning strategies for VR to increase use of TTW in collaboration with other agencies/divisions within OR Dept. of Human Services.
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 8**

<b>TA Outcomes</b>	Integrating Universal Design Concepts
<b>Strategy</b>	Facilitate dialogue and understanding of Universal Design (UD) principles; identify opportunities to apply UD concepts to employment programs; share info about use of assistive & other technology to create inclusive work environments.
<b>Provider</b>	NCHSD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007
<b>Accomplishments</b>	NCHSD provided comprehensive information via 1/07 teleconference: Universal Design & the Inclusive Workplace; provided TA in design & content of OBLN/VR brochure focused on UD; kept OR up on newest technology available that enhances people's ability to achieve, maintain or advance employment.
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 9**

<b>TA Outcomes</b>	Developing Effective Benefits Planning Resources
<b>Strategy</b>	Share info: Expansion strategies; networks; sustainable funding; provide on-site assistance to MIG Coordinator when hired; facilitate partnerships; assist w/outreach planning; provide instruction/training support for new system; TA on how to integrate financial literacy/asset development into system
<b>Provider</b>	NCHSD, CWD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007
<b>Accomplishments</b>	NCHSD provided on-site support during VT benefits planning (BP) visit; provided TA & content info on BP presentation to DHS upper mgmt; provided TA, tools & curricula examples for design of training; NCHSD & CWD shared detailed info & documents from other states' who have/are setting up BP system.
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 10**

<b>TA Outcomes</b>	Transportation
<b>Strategy</b>	Provide support to analyze and develop transportation programs.
<b>Provider</b>	NCHSD

<b>Planned Completion Date</b>	12/31/2008
<b>Actual Completion Date</b>	12/31/2007
<b>Accomplishments</b>	Participated in 1/07 NSCHD teleconference "Trends and Opportunities in Accessible Transportation"; NCHSD provided additional information on other state's efforts, particularly around transportation voucher systems.
<b>Problems</b>	ODOT plans that will be reviewed by NCHSD have been delayed.
<b>Status</b>	Completed

**TA Outcome 11**

<b>TA Outcomes</b>	Task Forces
<b>Strategy</b>	Facilitate state to state partnerships
<b>Provider</b>	CWD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	12/31/2007
<b>Accomplishments</b>	OR MIG active participant in monthly Behavioral Health; Working w/Business; Youth in Transition; and Asset Development task forces; presented with OBLN at 3/1/07 Working w/Business on collaborative efforts in employer engagement.
<b>Problems</b>	None in this quarter.
<b>Status</b>	Completed

**TA Outcome 12**

<b>TA Outcomes</b>	Advisory Council
<b>Strategy</b>	On-site visit
<b>Provider</b>	CWD
<b>Planned Completion Date</b>	12/31/2007
<b>Actual Completion Date</b>	3/15/2007
<b>Accomplishments</b>	CWD Director & consultant presented at 3/15/07 Leadership Council mtg, gave info on SSA 2/1, Medicaid including Buy-In, Employer engagement, Research/Eval projects. Met w/ DD, MIG & Director of DHS on EPD (Oregon Buy-In); met w/ MIG staff on issues in all Major Outcome areas.
<b>Problems</b>	None
<b>Status</b>	Completed

**TA Outcome 13**

<b>TA Outcomes</b>	Monthly Check In Teleconferences
<b>Strategy</b>	Schedule and facilitate monthly check in calls with OR MIG staff to share resources, updates and develop priorities for the coming month(s)
<b>Provider</b>	NCHSD, CWD
<b>Planned Completion Date</b>	12/31/2008
<b>Actual Completion Date</b>	
<b>Accomplishments</b>	N/A

<b>Problems</b>	Monthly calls are required and happen on a regular basis, but OR MIG does not consider them an outcome.
<b>Status</b>	Abandoned

**TA Outcome 14**

<b>TA Outcomes</b>	Medicaid Buy In/Other Work Incentives
<b>Strategy</b>	Provide information on intent of the Medicaid Buy In program and CMS' expectations for states. Conduct national teleconferences and develop a capacity building paper on the new Ticket to Work program regulations.
<b>Provider</b>	NCHSD, CWD
<b>Planned Completion Date</b>	12/31/2008
<b>Actual Completion Date</b>	
<b>Accomplishments</b>	N/A
<b>Problems</b>	This outcome has been folded into the larger outcome area of Research and Evaluation Initiatives and Developing Effective Benefits Planning Resources
<b>Status</b>	Abandoned

**TA Outcome 15**

<b>TA Outcomes</b>	Cultural Competency
<b>Strategy</b>	Assist in sharing materials and ideas with the CA MIG and other projects that are focusing on cultural diversity and sensitivity in services for people with disabilities.
<b>Provider</b>	NCHSD
<b>Planned Completion Date</b>	12/31/2008
<b>Actual Completion Date</b>	
<b>Accomplishments</b>	N/A
<b>Problems</b>	Please see Major Goals, Number 8. NCHSD and CWD are working with OR MIG to redefine this outcome in a quantifiable manner that will satisfy Leadership Council members and lead to increased employment opportunities for people with disabilities.
<b>Status</b>	Abandoned

**Outcome Data**

<b>Unduplicated Count of individuals Supported by MIG Activities (If Available)</b>	1350
<b>Percentage Increase From the Prior Year in the Number of Title II Beneficiaries Who Returned to Work (Annual Report Only)</b>	0.00%
<b>Percentage Increase From the Prior Year in the Number of Title XVI Beneficiaries Who Returned to Work (Annual Report Only)</b>	0.20%

**Roles of Participating  
Partners (including  
consumers)**

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## Resource Utilization

**Grant Funds Expended this  
Quarter**

\$146,289.00

**Carry-Over Funds Actual  
(Annual Report Only)**

\$250,000.00

**PMS expenditures end of  
period**

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**PMS expenditures end date**

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**Award Amount**

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