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Summary of report edit checks

Project Officer Name (PO)	<input type="text" value="Joe Razes"/>
PO Phone Number	<input type="text" value="410-786-6126"/>
PO e-Mail	<input type="text" value="joseph.razes@cms.hhs.gov"/>
Approve Date	<input type="text" value="6/5/2009"/>

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Ticket To Work Medicaid Infrastructure Grant Report

Basic Information

Grant Number	1QACMS030315/01
Lead Agency	Oregon Department of Human Services
Agency Mailing Address	500 Summer Street NE Salem, OR 97301-1076
Grantee Signatory	Jim Scherzinger
Grantee Title	Deputy Director of Finance
Grantee Telephone Number	503-945-5865
Grantee Email Address	jim.scherzinger@state.or.us
Grantee Fax Number	503-378-2857
Project director (PD)	Sara Kendall
PD Telephone Number	502-945-5857
PD Email Address	sara.kendall@state.or.us
PD Mailing Address 1	500 Summer Street NE
PD Mailing Address 2	
PD City	Salem
PD State	OR
PD Zipcode	97301-1120
Name of Report Preparer	Sara Kendall
Preparer Telephone Number	503-945-5857
Preparer Email Address	sara.kendall@state.or.us
Project Website	http://www.oregon.gov/DHS/vr/cep/
Basic Description	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.

Major Outcomes

Outcome 1

Workplan outcome	Increase yearly total of people w/disabilities receiving benefits & work incentives services through Work Incentives Network (WIN) & WIPA by minimum of 25% by 12/31/2009 from WIN-WIPA 2008 baseline of 2,263; Establish baseline by 6/30/2009 of numbers served who choose to obtain, maintain or advance in employment after receipt of benefits & work incentives services through WIN only & increase that # by a minimum of 5% by 12/31/2009; obtain a minimum of 1 grant in partnership w/Centers for Independent Living, WIPA & other partners by 12/31/2009 to assist in WIN sustainability at MIG end in 2011.
Core Outcome Area	Benefits Counseling and Work Incentive Programs
	Establish baseline of people who obtain, maintain or advance in employment

Strategy 1	after receipt of WIN services by 6/30/2009 using ETO software system.
Strategy 2	Contract with professional grant writer for assistance and collaborate on a minimum of 3 grants with Centers for Independent Living, Brain Injury Association of Oregon, Oregon's WIPA, Oregon Parent Training and Information Center/Department of Education to raise funds to maintain and expand WIN by 12/31/2009.
Strategy 3	Provide QA/QM committee with specified data from ETO software system for review by 06/11/2009; distribute consumer and partner surveys and tabulate results for QA/QM committee by 09/10/2009.
Strategy 4	Conduct a minimum of 6 WIN regional and/or statewide outreach events including outreach and establish a working relationship and do outreach to a minimum of 1 organization in each of the 6 WIN catchment areas of the state not yet included in community contacts, such as a hospital or high school (for a grand total of 12 outreach events) by 12/31/2009.
Strategy 5	Conduct monthly trainings for WIN and WIPA staff on various subjects related to benefits and work incentives supports and services; hold 1 WIN staff retreat that is comprised of 2 days of intensive trainings; provide re-certification training and re-certify all WIN Work Incentives Coordinators by 12/31/2009.
Funds Budgeted Annually to Outcome	\$514,577.00
Planned Completion Date	12/31/2009
Accomplishments	Workplan Outcome Q1: 208 people served through WIN. Strategy 1: All fields needed to establish baseline incorporated into software database system. Strategy 3: Met with committee 3/12 to share list of outcomes and performance measures they will be reviewing; developed evaluation checklist for site monitoring visits. Strategy 4: 18 regional outreach and 2 state presentations to over 200 people. Strategy 5: Monthly trainings: 1/09: Food Stamps; 2/09: Quality Service Delivery; 3/09: Special Needs Trusts.
Problems/Issues	None in this quarter
Status	On schedule
Actual Completion Date	

Outcome 2

Workplan outcome	Increase by a minimum of 5% the number of Oregon 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 12/31/2009 using OBLN 2008 Business Affiliates baseline of 46.
Core Outcome Area	Employment Networking
Strategy 1	Participate in national marketing campaign via leadership and MIG states work groups to roll out multi-media national campaign by 12/31/2009.
Strategy 2	Provide support to OBLN for re-design of website by 10/01/2009 to include Employment Department I-Match Skills or similar tool for Oregonians with disabilities to post resumes within specific business sectors in order to ensure state fulfillment of national marketing campaign.
Strategy 3	Provide MIG staff support as requested at various OBLN events and trainings, including Live Resume events through 12/31/2009.
Strategy 4	Provide support to OBLN with their marketing plan and implementation, including brochures and FlexAbility toolkit by 6/1/2009.
Strategy 5	Assist in enhancement of Live Resume events by connecting a minimum of 2 businesses for 2 scheduled Salem events by 12/31/2009.

Funds Budgeted Annually to Outcome	\$150,268.00
Planned Completion Date	12/31/2009
Accomplishments	Q1: Strategy 1: Ad agency hired; draft of initial branding/logo developed. Strategy 3: Salem Live Resume event staffed by MIG 3/12/09 with 6 job seekers and 2 employers in attendance. Strategy 4: Brochure completed and printed by MIG 3/26/09.
Problems/Issues	None in this quarter
Status	On schedule
Actual Completion Date	

Outcome 3

Workplan outcome	Increase employment by 12/31/2009 of: A) Yearly total of people diagnosed with serious mental illness entering competitive employment (CE) by a minimum 25% from 2008 OR Supported Employment Center for Excellence baseline of 306; B) Yearly total of people with a developmental disability entering CE by a minimum of 5% from 2008 VR ORCA database baseline of 596; C) Yearly total of people with TBI/ABI entering CE by a minimum of 5% from 2008 VR ORCA database baseline of 183.
Core Outcome Area	Employment Supports: Supported Employment
Strategy 1	Facilitate 14 county mental health providers' participation in OR DHS as EN project, including creating satellite agreements between DHS/providers and coordinating communication about project and materials between OVRs-MH-Providers-DHS by 12/31/2009.
Strategy 2	Expand MHSE peer mentoring groups to 10 via OR SE Center for Excellence, track and participate in DHS' planning to provide peer support through Medicaid by 12/31/2009.
Strategy 3	Provide support for OR SE Center for Excellence (OSECE) for staff expansion; continue to participate on OSECE quarterly advisory council meetings; Monitor implementation of activities and quarterly fidelity reports; ensure that WIN staff participate as requested in all fidelity reviews; ensure that WIN staff do regular outreach (a minimum of 1X per quarter) to all OSECE providers by 12/31/2009.
Strategy 4	Continue participation in DD Employment Task Force; Oregon Rehabilitation Association's Customized Employment work group; Supported Employment Leadership Network; Seniors and People with Disabilities Division's internal Employment First work group; provide training and outreach to DD providers on benefits and work incentives by 12/31/2009.
Strategy 5	Partner with Brain Injury Association of Oregon (BIAOR) to sponsor annual Pacific Northwest Brain Injury Conference; provide support for BIAOR and partners to attend conferences related to TBI/ABI and employment; partner with BIAOR on departmental work group; provide support to BIAOR and University of Oregon grant program in all efforts to promote SE for this population; provide support and research assistance if a TBI/ABI waiver is proposed by 12/31/2009.
Funds Budgeted Annually to Outcome	\$183,155.00
Planned Completion Date	12/31/2009
	Q1: Numbers served for SE: A) 2,462 B) 634, C) 200. Strategy 3: Additional full time staff hired; participated in quarterly advisory board meeting. Strategy 4: Participated in strategic planning meeting for DD Employment Task Force. Strategy 5: Co-sponsor of 7th annual Pacific NW Brain Injury Conference

Accomplishments	2/09; participated in Western Oregon University Teaching Research Institute's TBI Interagency Workgroup through Maternal Child Health grant and planned framework for Brian Injury Association of Oregon's part of that grant.
Problems/Issues	Strategy 1: Progress has been delayed by one quarter due to VR going into Order of Selection and going into legislative session.
Status	On schedule
Actual Completion Date	

Outcome 4

Workplan outcome	Increase the number of Employment Specialists and Job Coaches trained in Employment Outcomes Professional series by a minimum of 5% by 12/31/2009 from a baseline to be established by 06/30/2009, thereby increasing the progress of individuals diagnosed with serious mental illness; developmental disabilities and acquired/traumatic brain injury reaching successful employment closures through Oregon Office of Vocational Rehabilitation Services.
Core Outcome Area	Employment Training and Education
Strategy 1	Provide support for 38 Oregon Supported Employment Center for Excellence provider Employment Specialists to complete Employment Outcome Professional training by 12/31/2009.
Strategy 2	Provide support for managers from Seniors and People with Disabilities Division staff to complete Employment Outcome Professional training by 12/31/2009.
Strategy 3	Provide support for a minimum of 5 providers serving people with developmental disabilities to complete Employment Outcome Professional training by 12/31/2009.
Strategy 4	Coordinate with OVRs' Job Development Community Coordinator staff to promote and implement Employment Outcome Professional training as the preferred standard for Community Rehabilitation Providers by 12/31/2009.
Strategy 5	
Funds Budgeted Annually to Outcome	\$12,000.00
Planned Completion Date	12/31/2009
Accomplishments	Q1: Planning for Employment Outcome Professional EOP II training for MH and DD job developers and staff in Spring 2009 completed.
Problems/Issues	None in this quarter.
Status	On schedule
Actual Completion Date	

Consumer Involvement

Consumer 1

Name of Group	MIG Leadership Council
Role	Exists solely to interact with and on behalf of the MIG
Relationship to Grant	Provide the MIG with advice and direction; act as QA/QM oversight committee to WIN; participate in all MIG initiatives' sustainability efforts.

Percent of Members with a Disability

25.00%

Hours Spent Last Quarter (Approximate)

72

Consumer 2**Name of Group**

Supported Employment Developmental Disabilities Task Force

Role

Independent committee comprised of consumers; developmental disability advocacy, professional and provider groups seeking to revitalize state's DDSE efforts.

Relationship to Grant

Partners in initiatives related to SE for people with DD.

Percent of Members with a Disability

16.00%

Hours Spent Last Quarter (Approximate)

80

Consumer 3**Name of Group**

CORIL, HASL, EOCIL, ILR, LILA, SPOKES and SILC

Role

Centers for Independent Living holding WIN contracts and State Independent Living Council.

Relationship to Grant

Partners in WIN and stakeholders

Percent of Members with a Disability

75.00%

Hours Spent Last Quarter (Approximate)

250

Consumer 4**Name of Group**

Work Incentives Network Work Group

Role

Assist WIN by acting as QA/QM oversight committee; make recommendations for system changes and provide input on infrastructure; assist in sustainability efforts.

Relationship to Grant

MIG work group

Percent of Members with a Disability

43.00%

Hours Spent Last Quarter (Approximate)

18

Consumer 5**Name of Group**

Oregon Disabilities Commission Employed Persons with Disabilities Subcommittee

Role

Partner with Seniors and People with Disabilities (SPD) to improve EPD program and ensure quality services; advise SPD on revisions to EPD policy and procedures; educate public about EPD.

Relationship to Grant

Partners and stakeholders

Percent of Members with a Disability

45.00%

**Hours Spent Last Quarter
(Approximate)**

75

Consumer 6

Name of Group

Employer Engagement Work Group

Role

Assist in planning and implementing state employer engagement and education strategy tied to national marketing campaign.

Relationship to Grant

MIG work group

**Percent of Members with a
Disability**

17.00%

**Hours Spent Last Quarter
(Approximate)**

5

Consumer 7

Name of Group

Oregon Supported Employment Center for Excellence Advisory Board

Role

Provide recommendations and guidance on Center activities.

Relationship to Grant

Partners and stakeholders

**Percent of Members with a
Disability**

12.00%

**Hours Spent Last Quarter
(Approximate)**

50

Consumer 8

Name of Group

Supported Employment Work Group

Role

Participate in job academy concept development and implementation of other SE strategies.

Relationship to Grant

MIG work group

**Percent of Members with a
Disability**

11.00%

**Hours Spent Last Quarter
(Approximate)**

30

Research and Evaluation

Research 1

Report/Study Name

Work Incentives Network Key Performance Indicator Monthly Report

Brief Description

Evaluation of fiscal and programmatic impacts of WIN services on consumers on Medicaid state plan usage; adult service system (including MH, VR, DD, Long-Term Care) services; and amounts of tax revenue generated to state in part as result of WIN

Status

Ongoing

Report Location

Reports will be published on OR MIG website; date for 1st report June 11, 2009.

Brief Summary of Findings

None to date

State Plan PAS

State Plan PAS for Adults with Disabilities

Yes
Outside, including job site
Less than 40
OHP, GA, OSIPM
Provide assistance in ADLs, contract RN services
Yes
647
576
918
Yes

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

PAS by Waiver(s) for Adults with Disabilities

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
Persons diagnosed with DD who meet ICF/MR LOC
Assistance with ADLS, cognition, medications, oxygen, 24 hour care availability, contract RN services
Yes
0
4053
0

PAS Waiver 2

Brief Description of State Plan

State Plan Number

Is Waiver Statewide

Does Waiver Include Buy-In

Comprehensive Waiver (640)
OR0117.RO4.00
Yes
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)

Persons diagnosed with DD who meet ICF/MR LOC

Included Services (List)

Assistance with ADLS, cognition, medications, oxygen, 24 hour care availability, contract RN services

Are PAS Consumer Directed

Yes

Number Served with Mental Illness

0

Number Served with Developmental Disabilities

6041

Number Served with Physical Disabilities

0

PAS Waiver 3

Brief Description of State Plan

Aged and Physically Disabled Waiver

State Plan Number

0185.90R2

Is Waiver Statewide

Yes

Does Waiver Include Buy-In

Yes

Is This an Independence Plus Waiver

No

Location

In home and medical appointments only

Hours Allowed Per Month

Unlimited, based on need

Population limited To (List)

Seniors and people with physical disabilities

Included Services (List)

Assistance with ADLS, cognition, medications, oxygen, 24 hour care availability, contract RN services

Are PAS Consumer Directed

Yes

Number Served with Mental Illness

0

Number Served with Developmental Disabilities

0

Number Served with Physical Disabilities

25932

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)	SSI methodology, IRWEs, BWEs, EIE, Approved acctns
Method for Counting Unearned Income	Other (specify below)
Method for Counting Unearned Income (Other)	Excluded for eligibility, counted for liability
Web Site for Additional Information	http://egov.oregon.gov/DHS/spwpd/empserv.shtml#epd
Work Requirement	Show proof of filing/paying FICA or SECA. If self-employed clear and convincing evidence: If have not paid/filed SECA documents can include: written business plan reviewed/approved by neutral recognized 3rd party such as SBA, SCORE, VR, Micro-Enterprise Network.
Resource (Asset) for Individual Limit - Enter 2000, or Other Amount	5000
Resource Limit Includes Spousal Resources	No
Additional Savings Accounts are excluded	Yes
Additional Savings Accounts are Portable (After Leaving the Buy-In)	No
Cost-Sharing Policy	Premium
Cost-Sharing Policy (Other)	
Premium Payments Begin At	Other (specify)
Premium Payments Begin At (Other)	\$651
Method to Calculate Monthly Premiums, Co-Pays, or Other Cost Sharing	<\$651:0; \$651-866.99= \$50; \$867-2167.99= \$100; >\$2,168 = \$150
Medicaid Eligibility Review	Other (specify)
Medicaid Eligibility Review (Other)	3-12 mos: stability of employment, income, other
Enrollees at Beginning of Year	1069
Enrollees at Beginning of Year MI	
Enrollees at End of Quarter	1117
Enrollees at End of Quarter MI	
Major Outreach Activities (Up to 3)	Q1: Began development of EPD handout for Oregon Disabilities Commission to educate legislators; co-trained on quarterly EPD training for professional staff; Information on EPD included in 20 WIN outreach events.

Technical Assistance Outcomes

TA Outcome 1

TA Outcomes	10 Work Incentives Network and 3 MIG staff will complete training needed to provide quality benefits and work incentives planning supports and services as evidenced by successful completion of field assignment and a score of 80% or above on core competency test.
Strategy	Provide SSI/SSDI training to OR MIG and WIN staff.
Provider	NCHSD
Planned Completion Date	3/31/2009
Actual Completion Date	
Accomplishments	Q1: NCHSD staff provided training in Chicago on SSI/SSDI benefits and work incentives planning to 3 WIN staff and 1 MIG staff; all 4 received a score of 90 or above on the Oregon core competency test.
Problems	None in this quarter
Status	On schedule

TA Outcome 2

TA Outcomes	10 Work Incentives Network and 3 MIG staff will provide quality benefits and work incentives planning supports and services as evidenced by a minimum of 55% positive responses from consumer and partner surveys.
Strategy	Provide TA to OR MIG and WIN staff to ensure quality services
Provider	NCHSD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	Q1: Ongoing TA provided by NCHSD to MIG staff responsible for coordinating WIN program. Consumer surveys created and will be sent out in Q2.
Problems	None in this quarter
Status	On schedule

TA Outcome 3

TA Outcomes	Work Incentives Network curriculum will include 1 module on financial literacy.
Strategy	Provide TA and guidance on development and implementation of financial literacy training for WIN curriculum.
Provider	NCHSD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	None in this quarter
Problems	None in this quarter
Status	On schedule

TA Outcome 4

TA Outcomes	Work Incentives Network will have 1 additional source of funding to assist in sustainability
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Strategy	Provide TA and guidance on sustainability and funding issues for WIN; best legislative approaches for 09-11 biennium.
Provider	NCHSD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	Q1: WIN gained Oregon legislative champion who introduced Bill to legislature with fiscal attached to support WIN, funding is not expected due to economic climate but WIN Bill will be heard before committee. WIN staff attending town hall and Ways and Means Committee meetings across the state with WIN clients to promote WIN Bill and gain support.
Problems	United Way grant done in partnership with Oregon WIPA for WIN/WIPA joint funding not funded, will continue to apply for other appropriate grants.
Status	On schedule

TA Outcome 5

TA Outcomes	DHS will be functioning EN under TTW with a minimum of 10 providers participating in pilot program through 2009.
Strategy	Provide TA on development and implementation of DHS as EN under TTW.
Provider	NCHSD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	Q1: NCHSD wrote 10 minute overview of TTW program and impact of DHS being EN on Oregon for Vocational Rehabilitation Administrator to use in talking to DHS upper management. TTW Workgroup began meeting again 3/09 to resume work on model.
Problems	Progress on this has been delayed due to OR VR going into Order of Selection and legislative session beginning.
Status	Behind schedule

TA Outcome 6

TA Outcomes	Enrollees in Employed Persons with Disabilities (EPD, Oregon's Medicaid Buy-In) program will increase by a minimum of 5% from 2008 baseline of 1,069.
Strategy	Provide TA and guidance on EPD program and policy development.
Provider	CWD, NCHSD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	Q1: Enrollment is 1,117, an increase of 4.5%. CWD participated in EPD work groups and provided technical assistance on re-design of system and database; NCHSD provided TA and ideas on possible ways portability could work for Oregon.
Problems	None in this quarter
Status	On schedule

TA Outcome 7

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TA Outcomes	A multi-media national marketing campaign will roll out in at least 1 national media outlet; Oregon will have system in place to guarantee fulfillment and a one-year plan for a multi-media state campaign through the Oregon Business Leadership Network.
Strategy	Facilitate national marketing campaign; assist with development of state specific fulfillment strategy.
Provider	NCHSD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	Q1: Advertising agency hired; draft of initial branding and logo released to MIG national leadership group; NCHSD has raised close to 1 million dollars for campaign through MIG states to date; work on Oregon fulfillment continuing.
Problems	None in this quarter
Status	On schedule

TA Outcome 8

TA Outcomes	Ongoing TA on all initiatives to ensure successful completion of workplan outcomes
Strategy	Provide technical policy and evaluation expertise; share promising practices; facilitate state to state partnerships and information sharing; provide information and updates on federal Medicaid policies, regulations and laws that affect programming and policy on the local level.
Provider	NCHSD, CWD
Planned Completion Date	12/31/2009
Actual Completion Date	
Accomplishments	Q1: NCHSD and CWD provided ongoing TA on ARRA and ideas on how to utilize funding; NCHSD facilitated monthly calls with members of NW MIG Alliance resulting in Washington State and Oregon planning a Summer Train the Trainer in benefits and work incentives SSI/SSDI 5 day basic course. A minimum of 1 individual from each state will be trained and certified to provide this training; WA and OR will then provide free training on an ongoing basis to work incentives staff in both states; other NW MIG Alliance states who have a benefits planning system in addition to WIPA will also be invited to attend; Oregon participated in CWD NTAR Leadership webinars and business calls.
Problems	None in this quarter
Status	On schedule

Outcome Data

Unduplicated Count of Individuals Supported by MIG Activities (If Available)	
Percentage Increase From the Prior Year in the Number of Title II Beneficiaries Who Returned to Work (Annual Report Only)	
Percentage Increase From the Prior Year in the Number of	

Title XVI Beneficiaries Who Returned to Work (Annual Report Only)

Roles of Participating Partners (including consumers)

Resource Utilization

Grant Funds Expended this Quarter

\$230,811.22

Carry-Over Funds Actual (Annual Report Only)

PMS expenditures end of period

PMS expenditures end date

Award Amount
