

Archived 03/20/2015

MMDL: Balancing Incentive Program

Report Date

This report provides information regarding the Balancing Incentive Program as of the following date:

12/31/2012

Contacts

Please enter contact information for key individuals responsible for the State's Balancing Incentive Program.
State Medicaid Director

| | |
|----------------------|---|
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Balancing Incentive Program Project Director

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|----------------------|---|
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| Address 1: | <input type="text" value="615 Howerton Court"/> |
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Lead Staff for No Wrong Door / Single Entry Point System (if different from project director)

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Title:

Organization:

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City:

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Zip:

Phone:

Fax:

Email:

Lead Staff for Core Standardized Assessment (if different from project director)

Name:

Title:

Organization:

Address 1:

Address 2:

City:

State:

Zip:

Phone:

Fax:

Email:

Lead Staff for Conflict-Free Case Management (if different from project director)

Name:

Title:

Organization:

Address 1:

Address 2:


City:

State:

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Zip:
 Phone:
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 Report Preparer:

- Balancing Incentive Program Project Director**
- Lead Staff for No Wrong Door / Single Entry Point System (if different from project director)**
- Lead Staff for Core Standardized Assessment (if different from project director)**
- Lead Staff for Conflict-Free Case Management (if different from project director)**
- Other**

Name:
 Title:
 Organization:
 Address 1:
 Address 2:
 City:
 State: 
 Zip:
 Phone:
 Fax:
 Email:

Structural Changes

The Structural Changes section collects the State's progress toward implementing the State's previously submitted Work Plan. This section is organized according to the Work Plan Template, Appendix E of The Balancing Incentive Program: Implementation Manual.

General No Wrong Door/Single Entry Point (NWD/SEP) Structure (page 1 of 2)

1. Develop standardized informational materials that NWD/SEPs provide to individuals:
 - The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables:

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- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.
- This task was completed after the Program application was submitted, and its status remains current.
- This task is not yet complete.

Estimated percentage complete: %

Describe progress for this task during the reporting period:

A single Medicaid eligibility determination already exists in Missouri. No changes are anticipated to the Medicaid eligibility system at this time.

Information regarding community based LTSS is housed within the Department of Mental Health (DMH) and the Department of Health and Senior Services (DHSS) systems. An analysis has been completed to determine the content of the materials, availability either electronically or in paper format and whether material is up to date.

Describe experienced or anticipated challenges to completing this task:

Because information and referral services can be fragmented in Missouri, a major challenge exists in ensuring that individuals accessing services through one of the delivery systems is aware of all LTSS and can make an informed choice that best meets their needs in the community. Funding is limited.

Describe the State's plan to address the challenges described above:

Missouri is creating a Balancing Incentive Program (BIP) website that will be used by each No Wrong Door/Single Entry Point (NWD/SEP) entity to provide consistent, comprehensive information regarding community LTSS. A toll free number will be created to provide information regarding all community LTSS in Missouri. Materials currently being used are being reviewed for accuracy.

A summary of all available LTSS will be highlighted on the BIP Website. Links to the BIP website will be established on the NWD/SEP agency websites. Links on other community websites will be explored.

An informational brochure is being developed and will be placed on the BIP website. The brochure will be available for download/printing by any NWD/SEP entity, service provider, and advocacy groups.

Standardized information will be available to all NWD/SEP entities as well as all stakeholders and providers of services to ensure accessibility by all individuals seeking community based LTSS.

2. Train all participating staff on eligibility determination and enrollment processes:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

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Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.
- This task is not yet complete.

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Missouri is currently identifying staff within each agency to be trained and will begin work on the content of the training material once the standardized information material is developed. A web based training option is being explored to ensure consistency of the message delivered.

Describe experienced or anticipated challenges to completing this task:

Challenges exist in ensuring that all staff receives the same training in a timely manner.

Describe the State's plan to address the challenges described above:

Missouri is exploring the creation of an automated training module that will ensure consistency of training to all DSS/DMH/DHSS staff.

3. Detailed system design for the process to guide a person through assessment and eligibility determination (i.e., single eligibility coordinator, case management system, or otherwise coordinated process):

The State intends to seek CMS approval to change the date this deliverable will be submitted.

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Detailed technical specifications of system

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.
- This task was completed after the Program application was submitted, and its status remains current.
- This task is not yet complete.

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Data is shared between agencies both electronically and in a paper format. All NWD/SEP agencies have access to Medicaid eligibility information through the MMIS system. Participant service information is available to all agencies through MHD's Cyber Access system. Communication between the operating agencies and FSD regarding Medicaid applications is conducted using a paper IM-54 referral form which is stored in the participant individual records maintained by each agency.

Progress in the last quarter on the Missouri Health Information Network include:

- DSS and Missouri Health Connection (MHC) drafted a participation agreement to govern State Agency participation in the HIN. This agreement is being sent to DMH and DHSS for review.

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- MO HealthNet and MHC held technical meetings between the MMIS vendor and the HIN vendor to develop a strategy for connecting the MMIS to the HIN for the purpose of sharing Medicaid claims data.
- MO HealthNet met with the State's Information Technology Services Division to work on an overall State strategy for sharing information between the State Agencies and connecting those agencies to the HIN. After a strategy has been ascertained, funding required to implement the strategy will be secured.
- MO HealthNet received approval for an updated IAPD for the HITECH programs. MO HealthNet submitted an updated SMHP for approval.
- MHC has deployed Direct Secure Messaging for some Missouri Health Systems. MHC will deploy for the State Agencies after the participation agreement is finalized.
- MHC has received approval from the ONC to start implementation of Phase II – patient query function.

Describe experienced or anticipated challenges to completing this task:

No single automated system exists that will capture functional assessment data which can be shared electronically across agencies.

Challenges with the Missouri Health Information Network include:

- Reaching an agreement on a consent policy and what data Medicaid will share has been a challenge that has delayed the participation agreement.
- From a technical perspective, reaching an agreement between the MMIS and HIN vendors on the strategy for connecting the MMIS to the HIN.

Describe the State's plan to address the challenges described above:

Missouri is creating an automated Level I assessment and referral process, accessible on the Website and through a toll free number.

The Missouri Health Information Network (MHIN) contracted InterSystems to establish a statewide HIN to facilitate the exchange of health information between State Departments and connect to the statewide HIE to facilitate the exchange of health information with providers. The MHIN should improve communication between the operating agencies and FSD.

Challenges are being addressed as follows:

- MHD and MHC have sought advice from attorneys and consultants and queried other States for their policies.
- MHD and MHC have facilitated technical sessions to resolve the technical issues.

Structural Changes

General No Wrong Door/Single Entry Point (NWD/SEP) Structure (page 2 of 2)

4. Selection of vendor to develop the automated system for the process to guide a person through assessment and eligibility determination (i.e., single eligibility coordinator, case management system, or otherwise coordinated process):

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- The task is not applicable because the system will not be automated or state staff will develop the system.**
- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

5. Pilot implementation and testing of the process to guide a person through assessment and eligibility determination (i.e., single eligibility coordinator, case management system, or otherwise coordinated process):

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

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Missouri will roll out the NWD/SEP system upon completion of the Level I screening tool. The Level I screening tool will be incorporated into the BIP website and the toll free phone line. All SEP's will test the system prior to roll out to ensure referrals are made appropriately for the Level II assessments.

Describe experienced or anticipated challenges to completing this task:

Integration of the Level I screening tool into both the BIP website and the toll free number has proved to be more complicated than expected.

Describe the State's plan to address the challenges described above:

Missouri is working with ITSD staff to ensure that the integration of the screening tool is seamless and the individuals are referred to the most appropriate SEP to meet their needs. The screening tool will be piloted prior to adding to the BIP website. Additional time is being requested to ensure systems operate correctly.

6. Process to guide a person through assessment and eligibility determination (i.e., single eligibility coordinator, case management system, or otherwise coordinated process) is implemented statewide:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Missouri will submit a memo to CMS indicating the system is fully operational and describe any major system changes from the original design.

Describe experienced or anticipated challenges to completing this task:

No challenges anticipated

Describe the State's plan to address the challenges described above:

n/a

7. System updates for the process to guide a person through assessment and eligibility determination (i.e., single eligibility coordinator, case management system, or otherwise coordinated process).

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- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Describe changes to the system that were implemented:

Describe experienced or anticipated challenges:

Work on Level I assessment tool progressing slower than anticipated.

Describe the State's plan to address the challenges described above:

Extension requested to timeline for adding Level I to the BIP website.

Structural Changes

General No Wrong Door/Single Entry Point (NWD/SEP) Agencies

- Develop and implement a Memorandum of Understanding (MOU) across the Medicaid Agency, Operating agencies, and the NWD/SEPs:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Copy of completed MOU's included with this quarterly submission.

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

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Describe the State's plan to address the challenges described above:

2. Identify service shed coverage of all NWD/SEPs:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Percentage of state population covered by NWD/SEP

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

3. Ensure NWD/SEPs are accessible to older adults and individuals with disabilities:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

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- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)
Description of NWD/SEP features that promote accessibility

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

Structural Changes

NWD/SEP System Website

1. Register a domain name, which provides the right to link content to a Uniform Resource Locator (URL):
 - The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)
The URL for the website will be www.dss.mo.gov/BIP

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Archived 03/20/2015Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

2. Develop and incorporate content:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted? (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Enter the web site address (a.k.a. URL):

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

The URL for the website will be www.dss.mo.gov/BIP. A workgroup is determining the website content, linkages to existing information, creating materials to fill identified gaps, and ensuring website is 508 compliant. The Level I assessment tool will be available on the website at a later date.

Describe experienced or anticipated challenges to completing this task:

The scope of the website content has grown as a result of the analysis of the work group and will not be operational until May 1, 2013.

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Describe the State's plan to address the challenges described above:
Continue working on expanded website content.

3. Incorporate the Level I screen (recommended, not required):

The task is in the Work Plan.

The State intends to seek CMS approval to change the date this deliverable will be submitted.

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.

Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

A workgroup has created the workflow for the Level I assessment tool. Missouri's ITSD will assist in completing a decision tree for the automated Level I screen which will be housed on the BIP website. Once the assessment tool has been developed, the specific URL for the Level I screening will be provided to CMS.

Describe experienced or anticipated challenges to completing this task:

The major challenge has been ensuring that the questions contained in the Level I screen are concise and referrals to the operating agencies occur as planned.

Describe the State's plan to address the challenges described above:

Level I screens used by other states have been reviewed for content and decision tree processes. The automated Level I screen will be tested prior to live implementation and monitored thereafter to ensure participants are linked to the most appropriate BIP functional assessment entity. Due to the complexity of automating the Level I screen, the assessment should be operational by September 27, 2013.

Structural Changes

NWD/SEP System 1-800 Number

1. Contract 1-800 number service:

The State intends to seek CMS approval to change the date this deliverable will be submitted.

Archived 03/20/2015**When does the State anticipate deliverables for this task will be submitted?**

11/15/2013 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Enter the 1-800 number:

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Missouri's ITSD is assisting in the creation of an automated toll free number for the BIP with TTY access. The automated script will mirror the Level I assessment and ensure referral to the most appropriate operating agency for a functional assessment. Missouri's ITSD is assisting in the creation of an automated toll free number for the BIP. The automated script will mirror the Level I assessment and ensure referral to the most appropriate operating agency for a functional assessment. TTY access for the hearing impaired and translation services for non-English speaking individuals will be available. If the caller is unable to navigate the automated script, the call will be directed to an operator for assistance. If the operator is unavailable, the individual will have the option to leave a voice message and the operator will return their call. Stakeholders are also available to assist individuals who have accessibility issues.

Describe experienced or anticipated challenges to completing this task:

The only anticipated challenge will be lack of funding to operate a call center. Funding has been identified for 1.5 FTE to respond to inquiries through the toll free number.

Describe the State's plan to address the challenges described above:

Missouri plans to automate the toll free number to include the Level I assessment and make automated referrals directly to the NWD/SEP agencies. For inquiries for information outside of the automated Level I assessment there will be 1.5 FTE's to handle the call volume with a voicemail option. Due to automation of the toll free number, the projected date for implementation is September 28, 2013.

2. Train staff on answering phones, providing information, and conducting the Level I screen:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

11/15/2013 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

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Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.
- This task is not yet complete.

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Missouri is working on creation of a Level I screen and standardized information materials. Once the materials are available a training package can be developed and staff trained. Web based training is being explored to ensure consistency of message across NWD/SEP agencies.

Describe experienced or anticipated challenges to completing this task:

Challenges exist in ensuring that all staff receives the same training in a timely manner.

Describe the State's plan to address the challenges described above:

Missouri is exploring the creation of an automated training module that will ensure consistency of training to all DSS/DMH/DHSS staff.

Structural Changes

NWD/SEP System Advertising

1. Develop advertising plan:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.

When does the State anticipate deliverables for this task will be submitted?

 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Detailed advertising plan is being submitted with this quarterly report.

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.
- This task was completed after the Program application was submitted, and its status remains current.
- This task is not yet complete.

Estimated percentage complete: %

Archived 03/20/2015

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

2. Implement advertising plan:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

A workgroup is developing advertising materials that will be ready for distribution in coordination with the BIP website debut May 1, 2013. Copies of materials will be provided to CMS upon completion.

Describe experienced or anticipated challenges to completing this task:

Funding for advertising materials is a major challenge.

Describe the State's plan to address the challenges described above:

Missouri is exploring no-cost advertising options including the Missouri Website Homepage, Medicaid provider bulletins, DMH division directives, and DHSS provider memorandums. FSD offices as well as stakeholders, such as grass roots organizations and provider associations, will be encouraged to advertise through their local channels.

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Structural Changes

Core Standardized Assessment

1. Develop questions for the Level I screen:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

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Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Missouri is committed to creating an initial Level I standardized assessment tool, used across disability populations, for determining eligibility for Medicaid and non-institutionally based long-term services and supports. The initial assessment tool will be used in a uniform manner throughout the State to determine a beneficiary's needs for training, support services, medical care, transportation, and other services. Missouri's ITSD will assist in completing a decision tree for the automated Level I screen which will be housed on the BIP website. A workgroup has made significant process in designing the Level I assessment tool.

Describe experienced or anticipated challenges to completing this task:

Ensuring the automation process for the Level I screen on the BIP website and the toll free number results in an accurate referral to the most appropriate NWD/SEP entity is more complicated than originally anticipated.

Describe the State's plan to address the challenges described above:

Additional time is being requested to achieve goal.

2. Incorporate additional domains and topics into assessments if necessary:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

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Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

3. Train staff members at NWD/SEPs to coordinate the CSA:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

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Describe progress for this task during the reporting period:

Training is conducted on an ongoing basis within each operating agency to ensure timeliness of assessment and coordination of data collected. Training materials for the BIP are being developed to include all aspects of the eligibility determination and enrollment processes. The Level II initiation and coordination process will be included in this training material. Training materials and schedules will be provided to CMS upon completion.

Describe experienced or anticipated challenges to completing this task:

Challenges exist in ensuring that all staff receives the same training in a timely manner.

Describe the State's plan to address the challenges described above:

Missouri is exploring the creation of an automated training module that will ensure consistency of training to all DSS/DMH/DHSS staff.

4. Identify qualified personnel to conduct the CSA:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

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- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

5. Updates to Core Standardized Assessment:

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- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Describe changes to the Core Standardized Assessment that were implemented:

Describe experienced or anticipated challenges:

Describe the State's plan to address the challenges described above:

Structural Changes

Conflict-Free Case Management

Establish protocol for removing conflict of interest:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

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Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

Structural Changes

Sustainability

Develop sustainability plan:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

(mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Funding sources and estimated annual budget necessary to maintain structural changes after award period ends

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Missouri is committed to maintaining the BIP infrastructure throughout the project and beyond 2015 with the use of state administrative dollars and grant funding wherever possible to enhance the community LTSS system. The ongoing costs will include maintenance of the BIP website, the toll free number, updating program materials, and staffing as needed. Once the HITECH grant expires, the HIN will become self-sustaining by charging a subscription fee.

Describe experienced or anticipated challenges to completing this task:

Unknown at this time.

Describe the State's plan to address the challenges described above:

Challenges will be addressed as they are identified and reported on the quarterly reports.

Structural Changes

Coordination with Health Information Exchange Information Technology (IT) System

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1. Describe plans to coordinate the NWD/SEP system with the Health Information Exchange IT system:

- The State intends to seek CMS approval to change the date this deliverable will be submitted.**

When does the State anticipate deliverables for this task will be submitted?

 (mm/dd/yyyy)

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)
Description of plan of coordination

- This task was completed by the time the Program application was submitted. Supporting information can be found in the application and/or Work Plan.**
- This task was completed after the Program application was submitted, and its status remains current.**
- This task is not yet complete.**

Estimated percentage complete: %

Describe progress for this task during the reporting period:

Describe experienced or anticipated challenges to completing this task:

Describe the State's plan to address the challenges described above:

2. Updates on coordination with the Health Information Exchange IT system, including the technological infrastructure.

- The State intends to seek CMS approval to amend what will be submitted as deliverables for this task.**

Deliverables: (Please note any variance from Deliverables in the Work Plan)

Describe changes to coordination between the NWD/SEP system and the HIE IT system that occurred:

Progress Last Quarter:

- DSS and Missouri Health Connection (MHC) drafted a participation agreement to govern State Agency participation in the HIN. This agreement will be sent to DMH and DHSS for review.
- MO HealthNet and MHC help technical meetings between the MMIS vendor and the HIN vendor to develop a strategy for connecting the MMIS to the HIN for the purpose of sharing Medicaid claims data.
- MO HealthNet met with the State's Information Technology Services Division to work on an overall State strategy for sharing information between the State Agencies and connecting those agencies to the HIN. After a strategy has been ascertained, funding required to implement the strategy will be secured.

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- MO HealthNet received approval for an updated IAPD for the HITECH programs. MO HealthNet submitted an updated SMHP for approval.
- MHC has deployed Direct Secure Messaging for some Missouri Health Systems. MHC will deploy for the State Agencies after the participation agreement is finalized.
- MHC has received approval from the ONC to start implementation of Phase II – patient query function.

Describe experienced or anticipated challenges:

Challenges experienced during this quarter include:

- Reaching an agreement on a consent policy and what data Medicaid will share has been a challenge that has delayed the participation agreement.
- From a technical perspective, reaching an agreement between the MMIS and HIN vendors on the strategy for connecting the MMIS to the HIN.

Describe the State's plan to address the challenges described above:

Challenges addressed as follows:

- MHD and MHC have sought advice from attorneys and consultants and queried other States for their policies.
- MHD and MHC have facilitated technical sessions to resolve the technical issues.

Data Collection - List of Measures

The Data Collection section documents the State's progress toward collecting the Service, Quality, and Outcome data the State agreed to collect as part of the State's Balancing Incentive Program application.
Service Measures:

| Measure Name | Start of Measure Description | Implementation | Withdrawn |
|----------------------|--|----------------|-----------|
| CMS 64 | Quarterly statement of actual program costs and administrative expenditures for which States are ent | Complete | No |
| BIP Participant Data | Gather participant LTSS data including: •Total expenditures for community LTSS •Total expenditures f | Complete | No |

Quality Measures:

| Measure Name | Start of Measure Description | Implementation | Withdrawn |
|------------------------|--|----------------|-----------|
| Adult Quality Measures | Missouri has been approved for an Adult Quality Grant that will allow MHD to further develop its ana | Not Complete | No |

Outcome Measures:

| Measure Name | Start of Measure Description | Implementation | Withdrawn |
|-----------------------------|---|----------------|-----------|
| Customer Services Postcards | Measures outcomes related to Medicaid eligibility determination. | Complete | No |
| Adult Consumer Survey | The Adult Consumer Survey obtains responses to questions related to the following Core Indicators: | Complete | No |
| Adult/Family Survey | Consumer satisfaction with services delivered to individuals with Developmental Disabilities. Respo | Complete | No |
| Family/Guardian Survey | Consumer satisfaction with services delivered to individuals | Complete | No |

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| Measure Name | Start of Measure Description | Implementation | Withdrawn |
|---------------------|---|----------------|-----------|
| | with Developmental Disabilities. Respo | | |
| Child/Family Survey | Consumer satisfaction with services delivered to individuals with Developmental Disabilities. Respo | Complete | No |

Measure Detail

- The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

CMS 64

Describe the measure:(Please note any variance from a similar measure submitted with the Work Plan)

Quarterly statement of actual program costs and administrative expenditures for which States are entitled to Federal reimbursement under the authority of Title XIX of the Act

Type of measure:

- Service
 Quality
 Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

Describe how frequently the State calculates the measure for internal use and/or external reporting:

Quarterly

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- The State calculated the measure for internal use and/or external reporting during the reporting period.**

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)**
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

Describe the State's sampling approach:

- 100%**
 Representative sample
 Stratified sample
 Other

If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

What data source(s) does the State use to collect the data (e.g., information system or survey):

MMIS

Measure Detail

- The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

BIP Participant Data

Describe the measure:(Please note any variance from a similar measure submitted with the Work Plan)

Gather participant LTSS data including:•Total expenditures for community LTSS •Total expenditures for institutional LTSS •Total participants accessing community LTSS •Total participants accessing institutional LTSS •Breakdown of community LTSS delivered during the quarter and number of participants served

Type of measure:

- Service**
 Quality
 Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)**
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure**

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Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

Describe how frequently the State calculates the measure for internal use and/or external reporting:

Data is collected quarterly

The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)**
- People with developmental disabilities**
- People with a serious mental illness or severe emotional disturbance**
- People with physical disabilities**
- Other**

Please specify:

Describe the State's sampling approach:

- 100%**
- Representative sample**
- Stratified sample**
- Other**

If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

What data source(s) does the State use to collect the data (e.g., information system or survey):

MMIS

Measure Detail

The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

Adult Quality Measures

Describe the measure:(Please note any variance from a similar measure submitted with the Work Plan)

Missouri has been approved for an Adult Quality Grant that will allow MHD to further develop its analytic capacity to collect and analyze data on a comprehensive set of HEDIS measures for the

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community LTSS population. MHD is developing the capacity to produce HEDIS data, analyze data in-house through a known standardized method across providers, conduct ad hoc analysis of claims data for a variety of quality-related purposes by augmenting its information technology infrastructure, acquire dual eligible data from CMS for the purpose of care coordination at the state and provider levels, and expand educational interventions and data sharing with service providers. Focus will be on development of process measures over time, collection and evaluation of at least fifteen (15) core measures over time, implementation and evaluation of the quality improvement initiatives for the community LTSS population, and evaluation and root cause analysis of goals not met with an emphasis on lessons learned. The core set of measures are currently under development and will be reported separately as measures when identified.

Type of measure:

- Service
 Quality
 Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Adult Quality Grant awarded December 21, 2012. A core set of quality measures are currently under development and will be reported separately on the quarterly report as measures when identified.

Describe experienced or anticipated challenges to implementing this measure:

A challenge exists with quickly identifying Medicaid participants accessing community LTSS so HEDIS measures specific to this population can be gathered and analyzed.

Describe the State's plan to address the challenges described above:

Missouri is exploring adding a BIP indicator to identify Medicaid participants accessing community LTSS for ease of reporting.

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

Describe how frequently the State calculates the measure for internal use and/or external reporting:

- The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

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Describe the State's sampling approach:

- 100%
- Representative sample
- Stratified sample
- Other

If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

What data source(s) does the State use to collect the data (e.g., information system or survey):

Measure Detail

- The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

Describe the measure:(Please note any variance from a similar measure submitted with the Work Plan)

Measures outcomes related to Medicaid eligibility determination.

Type of measure:

- Service
- Quality
- Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)
- People with developmental disabilities
- People with a serious mental illness or severe emotional disturbance
- People with physical disabilities
- Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

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Describe how frequently the State calculates the measure for internal use and/or external reporting:

Customer Services Postcards are received by the local county Family Support Division (FSD) office on a monthly basis and action taken immediately by local staff. The FSD Income Maintenance Quality Assurance/Quality Control Unit (IM-QA/QC) receives the Customer Services Postcards, records the information from the card onto a spreadsheet, then compiles a summary report of the information at the Federal Fiscal Year-end. All cards received are reviewed and recorded as they are received.

The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)**
- People with developmental disabilities**
- People with a serious mental illness or severe emotional disturbance**
- People with physical disabilities**
- Other**

Please specify:

Describe the State's sampling approach:

- 100%**
- Representative sample**
- Stratified sample**
- Other**

If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

What data source(s) does the State use to collect the data (e.g., information system or survey):

Customer Services Postcards

Measure Detail

- The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

Adult Consumer Survey

Describe the measure: (Please note any variance from a similar measure submitted with the Work Plan)

The Adult Consumer Survey obtains responses to questions related to the following Core Indicators:

- Community Inclusion
- Choice and Decision-Making
- Relationships
- Satisfaction
- Service Coordination
- Access
- Safety
- Health
- Wellness

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- Medications
- Respect and Rights
- Self-Determination
- Work

Type of measure:

- Service
 Quality
 Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

Describe how frequently the State calculates the measure for internal use and/or external reporting:

Annually - Last survey year 2011/2012

- The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

Describe the State's sampling approach:

- 100%
 Representative sample
 Stratified sample
 Other

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If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

Sample size of 400 allows a 95% confidence interval with +/- 5% margin of error

What data source(s) does the State use to collect the data (e.g., information system or survey):

Adult Consumer Survey

Measure Detail

- The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

Adult/Family Survey

Describe the measure:(Please note any variance from a similar measure submitted with the Work Plan)

Consumer satisfaction with services delivered to individuals with Developmental Disabilities. Responses to questions relate to the following Core Indicators:

- Information and Planning
- Choices and Control
- Access and Support Delivery
- Community Connections
- Family Involvement
- Satisfaction
- Outcomes

Type of measure:

- Service
 Quality
 Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)
 People with developmental disabilities
 People with a serious mental illness or severe emotional disturbance
 People with physical disabilities
 Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

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Describe how frequently the State calculates the measure for internal use and/or external reporting:

Minimum of every 3 years - Last survey year 2008/2009

The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)**
- People with developmental disabilities**
- People with a serious mental illness or severe emotional disturbance**
- People with physical disabilities**
- Other**

Please specify:

Describe the State's sampling approach:

- 100%**
- Representative sample**
- Stratified sample**
- Other**

If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

Sample size of 400 allows a 95% confidence interval with +/- 5% margin of error

What data source(s) does the State use to collect the data (e.g., information system or survey):

Adult/Family Survey

Measure Detail

The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

Family/Guardian Survey

Describe the measure:(Please note any variance from a similar measure submitted with the Work Plan)

Consumer satisfaction with services delivered to individuals with Developmental Disabilities. Responses to questions relate to the following Core Indicators:

- Information and Planning
- Choices and Control
- Access and Support Delivery
- Community Connections
- Family Involvement
- Satisfaction
- Outcomes

Type of measure:

- Service**
- Quality**
- Outcome**

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)**
- People with developmental disabilities**

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- People with a serious mental illness or severe emotional disturbance
- People with physical disabilities
- Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

Describe how frequently the State calculates the measure for internal use and/or external reporting:

Minimum of every 3 years - last survey year 2010/2011

- The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)
- People with developmental disabilities
- People with a serious mental illness or severe emotional disturbance
- People with physical disabilities
- Other

Please specify:

Describe the State's sampling approach:

- 100%
- Representative sample
- Stratified sample
- Other

If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable:

Sample size of 400 allows a 95% confidence interval with +/- 5% margin of error

What data source(s) does the State use to collect the data (e.g., information system or survey):

Family/Guardian Survey

Measure Detail

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- The State intends to seek CMS approval to amend the name, description, or type of measure, or the applicable populations.

Name of the measure:

Child/Family Survey

Describe the measure: (Please note any variance from a similar measure submitted with the Work Plan)

Consumer satisfaction with services delivered to individuals with Developmental Disabilities. Responses to questions relate to the following Core Indicators:

- Information and Planning
- Choices and Control
- Access and Support Delivery
- Community Connections
- Family Involvement
- Satisfaction
- Outcomes

Type of measure:

- Service
- Quality
- Outcome

Applicable populations: (select all populations for whom the measure is or will be used.)

- Elderly individuals (age 65 or older)
- People with developmental disabilities
- People with a serious mental illness or severe emotional disturbance
- People with physical disabilities
- Other

Please specify:

- The State implemented the measure, i.e., it has the ability to report data for the measure

Estimated implementation percentage complete: %

Describe progress toward implementing this measure during the reporting period:

Describe experienced or anticipated challenges to implementing this measure:

Describe the State's plan to address the challenges described above:

- The State no longer plans to implement this measure.

Explain the reason(s) the State no longer plans to implement this measure:

Describe how frequently the State calculates the measure for internal use and/or external reporting:

Minimum of every 3 years - Last survey conducted 2009/2010

- The State calculated the measure for internal use and/or external reporting during the reporting period.

Populations for which the measure was calculated (select all that apply):

- Elderly individuals (age 65 or older)
- People with developmental disabilities
- People with a serious mental illness or severe emotional disturbance

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| |
|---|
| <input type="checkbox"/> People with physical disabilities <input type="checkbox"/> Other Please specify: <div style="border: 1px solid black; height: 20px; width: 100%;"></div> |
| Describe the State's sampling approach: <input type="radio"/> 100% <input checked="" type="radio"/> Representative sample <input type="radio"/> Stratified sample <input type="radio"/> Other If the sampling approach is not 100%, explain the sampling approach below. Include information such as confidence interval, margin of error, and variables used for sample stratification, if applicable: Sample size of 400 allows a 95% confidence interval with +/- 5% margin of error What data source(s) does the State use to collect the data (e.g., information system or survey): Child/Family Survey |

Expenditures Reporting, Current Reporting Period

- The State is using the methodology from Attachment C of the Balancing Incentive Program Application Announcement to report expenditures during this reporting period:**

Enter the following information based on data the State will enter in the CMS 64 report for this reporting period. If this is a State's first report, the reporting period for purposes of the following fields includes all completed quarters for which the State has received Balancing Incentive Program payments.

| | |
|---|---------------------------|
| Total non-institutional LTSS reported on the CMS 64 report: | \$393954710.00 |
| Total institutional LTSS reported on the CMS 64 report: | \$327381039.00 |
| Total qualified HCBS expenditures, demonstration services, and supplemental services funded by the Money Follows the Person demonstration: | \$2499670.00 |
| Total LTSS: | \$723,835,419.00 |
| Percentage of LTSS for non-institutional services and supports: | 54.77% |
| Change in percentage of LTSS for non-institutional services and supports from previous quarter (assuming no prior period adjustments): | N/A (first report) |

Expenditures Reporting,

Adjustments to Prior Reporting Periods

The State reports prior period adjustments to previously submitted reports for the following reporting periods:

| | | |
|----------------------------------|--|--|
| Reporting Period End Date | | |
|----------------------------------|--|--|

Assurances

Explain how the State used the additional Federal funds paid to the State under the Balancing Incentive Program during the reporting period for purposes of providing new or expanded offerings of non-institutionally-based LTSS, as required in Section 10202(c)(4) of the Affordable Care Act.

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Missouri will use the enhanced funds to expand access to the Partnership for Hope Waiver and the Missouri Children with Developmental Disabilities Waiver. An additional 1,100 Medicaid participants will be eligible for community long term services and supports and an additional 150 children will become Medicaid eligible and remain in their homes as a result of receipt of community based long term services and supports. Both waiver amendments to add the additional slots have been approved by CMS. In addition, an amendment to the Comprehensive Waiver to serve an additional 166 participants is under development and should be submitted to CMS during November.

- The State attests it has not restricted eligibility standards, methodologies, or procedures for LTSS during the reporting period.**