

## **Formal Agenda**

### **DBHDS SIS-A 4th Edition Advisory Group**

12:00PM-1:30PM – Tuesday November 19, 2023

Online Zoom Meeting (see link below)

#### **AGENDA**

12:00 Welcome and Housekeeping

12:05 Questions and Answers

12:20 Revisiting Where We Are

12:50 Upcoming Analysis

1:15 Record Review

1:25 Next steps, Question/Feedback Form, and Survey

1:30 Adjournment

#### **Zoom Meeting Information**

<https://us06web.zoom.us/j/81441194053>

Or One tap mobile :

+17207072699,,81441194053# US (Denver)

+12532050468,,81441194053# US

Or Telephone:

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Webinar ID: 814 4119 4053

International numbers available: <https://us06web.zoom.us/j/81441194053>



Human Services  
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# Virginia SIS-A 2nd Edition Advisory Group

December 2023

# Housekeeping

Some of the people in this meeting are advisory group members who will participate in the discussion. Everyone else is welcome to type questions in the chat or send your questions to [SIS@dbhds.virginia.gov](mailto:SIS@dbhds.virginia.gov).

Everyone's participation is voluntary. You do not need to participate in any discussion, polls, or chats.

This meeting is hosted by HSRI and may not reflect the views of Virginia Department of Behavioral Health & Developmental Services (DBHDS).

This meeting is being recorded, as a tool for advisory group members to watch later if they had to miss today.

Please mute yourself when you are not talking.

Please allow all advisory group members the opportunity to speak up! Limit comments to about 1 minute.

# Working Collaboratively

- Be solution-focused and provide supportive and constructive feedback. Let's keep focused on the end goal of updating the support levels/rate tiers
- Respect and listen, don't blame
- Assume good intentions
- When sharing verbally, try to keep response brief and wait, so that others have time to speak. If you want to share more, you can always type in the chat, add comments to the form, e-mail, or request a separate meeting to discuss
- This is an interactive meeting! We encourage you to participate!

# Agenda



**Revisiting Where We Are**



**Upcoming Analysis**



**Record Review**



**Next Steps**

# In the Advisory Group:

- You will hear about our upcoming plans for this project
- You will have opportunities to provide ideas and feedback about this project and what we recommend
- You can ask questions
- You will review our analysis and recommendations
- You can help us make sure that our plans work for people receiving services, their families, advocates, support coordinators, and providers

We will meet monthly from September 2023 through April 2024 for 90 minutes to 2 hours per meeting





# Revisiting Where We Are



# Project Activities

1

## Consult people

- Advisory group
- Key informant interviews
- Engagement sessions

2

## Analyze changes to support levels/rate tiers

- Review supplemental questions and verification process
- Analyze the new SIS scoring and the advanced questions
- Analyze the rate tiers
- Test out the proposed changes with a record review

3

## Recommend changes to support levels/rate tiers

- Propose final recommendations
- Develop a transition plan
- Develop a communication plan to help support the implementation

# Consult People – Advisory Group

- Convene an advisory group –That’s you!
- We’ve met 4 times, including this meeting
- We’ll continue to meet monthly through early next year
- We have 4 more meetings left
- We’ve discussed:
  - The current support level/rate tier model and our project (meeting 1)
  - SIS changes, our analysis on the national data set, and potential changes to the rates (meeting 2)
  - Identifying people who have medical and behavioral needs (meeting 3)

**We have a lot left to talk about and are using our time today to look ahead!**

# Consult People – Key Informant Interviews

- We held 8 interviews with:
  - Regional support specialists – Verification, training, reassessment
  - OISS – Assigning support levels/tiers and managing the rate system
  - Customized rates – Managing customized rate exceptions
  - Quality manager – Training, SIS administration, assessment timelines, reassessment
  - RSU Manager – Training, SIS administration, assessment timelines, reassessment
  - Waiver Operations Director – Oversight of waivers
  - DSS Leadership – Trends and goals moving forward
  - Department of Medical Assistance Services leadership – Trends and goals moving forward

# Consult People – Informational Meetings

- We held informational meetings with:
  - Service Recipients & Families on November 16th, 2023, from 2:00-3:45ET
    - There were about 20 participants
  - Support Coordinators on November 16th, 2023, from 10:00-11:45ET
    - There were about 61 participants
  - Providers on November 15th, 2023, from 11:00-12:45ET
    - There were about 63 participants
- We received, and answered, several questions
- Videos will be posted to DBHDS's YouTube:  
<https://www.youtube.com/c/VirginiaDBHDS>

# Analyze Support Levels/Rate Tiers – Review Supplemental Questions and Verification

- In our last meeting we discussed medical and behavioral needs and how best to identify them
- Using your words and ideas, we will review the supplemental questions and propose changes
- We may also propose changes to the level descriptions, that describe people at each support level
- This work is currently under development

# Analyze Support Levels/Rate Tiers – Analyze New SIS Scoring/Advanced Questions

- We have over 20,000 SIS-A assessments available for analysis
- We are analyzing these assessments to determine:
  - The impact of the renorming
  - How to best update the model using this new assessment
- Nearly 1900 of these assessments have responses to the advance questions
- We are analyzing the advance questions to determine
  - How people have responded to these questions
  - How best to update the medical and behavioral levels using the additional items

# Analyze Support Levels/Rate Tiers – Analyze the Rate Tiers

- We are not evaluating rate model cost assumptions
- After we complete the development of the support levels, we will review rate tiers to determine:
  - How rate tiers align to the support levels
  - Whether changes to the staffing assumptions are needed in the rate models
- We may or may not propose changes to the existing reimbursement rates

# Analyze Support Levels/Rate Tiers – Test Out Proposed Changes with Record Review

- We will conduct a record review to determine whether the proposed changes will adequately support people's needs
- We will determine a sample of individuals, up to 200 people, to review their records to determine whether the support levels match their needs and whether the rate tiers are adequate to meet their needs
- We'll talk about record review more in a bit!



# Recommend Changes to Support Levels/Rate Tiers

- We will propose final recommendations in a written report
  - We will share that information with the advisory group over the next four meetings
- We'll propose a transition plan
- We'll propose a communications plan

# Timeline



## April-June 2023

- Begin Contract Work
- Background research

## July-Sept. 2023

- Establish Advisory Group
- Key Informant Interviews
- Begin data analysis

## Oct.-December

- Continue Advisory Group meetings
- 1<sup>st</sup> Engagement Sessions
- Complete data analysis

## Jan.-April 2023

- Continue Advisory Group meetings
- 2<sup>nd</sup> Engagement Sessions
- Test proposed changes
- Recommend final changes
- Complete implementation & communication plan

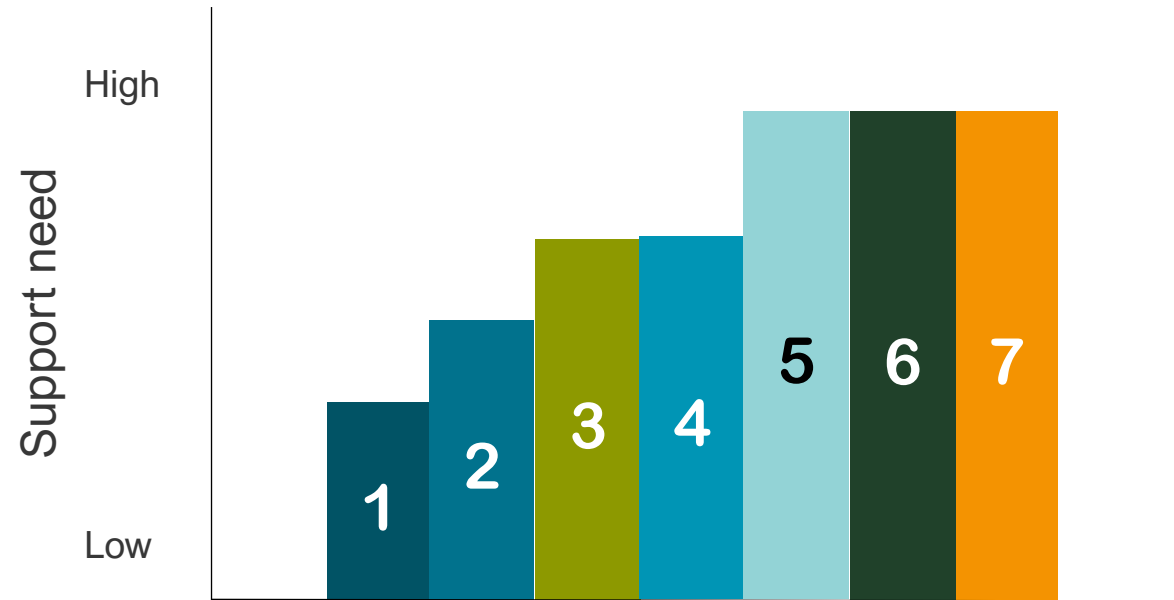


# Upcoming Analysis

# Current Use of the SIS

- SIS scores are used to assign everyone who takes a SIS assessment a support level, along with the supplemental questions, and document review verification for some people
- Currently, people are assigned to support levels using sections:
  - 2A. Home Living Activities
  - 2B. Community Living Activities
  - 2E. Health and Safety Activities (future 2C)
  - 1A: Exceptional Medical Support Needs (25 future items)
  - 1B: Exceptional Behavioral Support Needs (14 future items)
- In the future, DBHDS may continue to use these sections, may use additional sections, or may use Supports Needs Index (SNI) – a score of all seven subsections of section 2 of the SIS

# Current Support Levels



# Explore the Impact of Changes to SIS-A

- We are exploring how renorming impacts the current model, and where and how people will move if there are no updates made
- We are doing this by applying the new scoring to the existing assessments to see how support levels/rate tiers will change
- We will also review impacts by different tiered services and other characteristics
- This exploration will help us determine the best path forward

# Explore Updates to the Model

- We shared information about how we conducted the analysis on the national data set in our 2<sup>nd</sup> meeting
- We are in the process of conducting similar analysis on Virginia's data
- This analysis is called latent class analysis
- Latent class analysis:
  - Is a statistical analysis that can be used to find homogenous groups
  - Can be used to test different models
  - Is used for answering questions like:
    - How many levels should there be for general support needs
    - What should the criteria be

# After we Complete Analysis

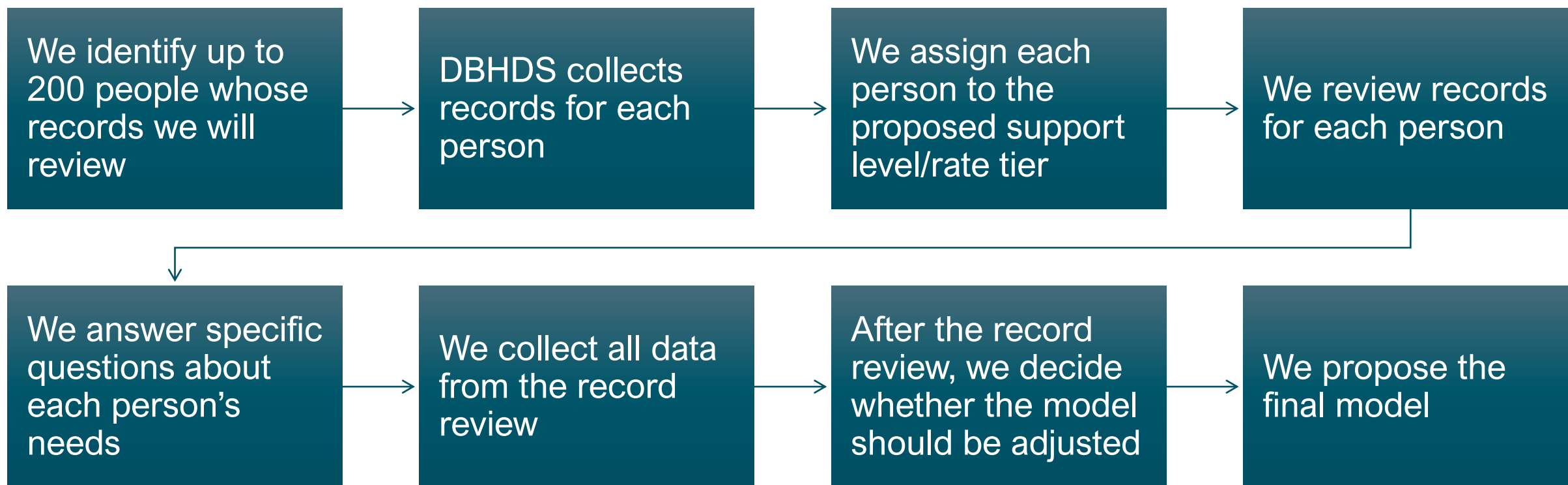
- We will be able to propose new support levels and new criteria for the support levels
- Then we will review rates for potential changes
- We will test our proposal with a record review
- We will finalize this model after the record review





# Record Review

# Record Review Steps



# Record Review Asks



## Support Levels

- Do general support needs increase from low to high?
- Do people assigned to medical and behavioral levels have extraordinary needs?
- Do people in the same support level have similar support needs?



## Support Level Descriptions

- Do descriptions accurately reflect support needs?
- How can descriptions be improved?



## Rate Tiers

- Do rate tiers match the needs of people assigned to tier?
- Are rate tiers adequate to meet the needs of people assigned to tier?

# Record Review may Result in Adjustments

- To the support levels
- To the rate tiers or staffing ratios
- To policies and practices related to the model

Record review is the last step to ensure that model works for people receiving services and their families



# Next Steps

# Timeline



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- Begin Contract Work
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- Continue Advisory Group meetings
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- Test proposed changes
- Recommend final changes
- Complete implementation & communication plan

# What's Next?



- If you're listening in and have used your e-mail for this meeting, we'll add your e-mail to the next meeting invite (optional, of course)
- If you want to ask a question or share feedback, please use this link:  
[https://docs.google.com/forms/d/e/1FAIpQLSc21y4XpMleJZ9AGWtPuiR8c1PeZr5r-luU8raVtq3JYmwsug/viewform?usp=sf\\_link](https://docs.google.com/forms/d/e/1FAIpQLSc21y4XpMleJZ9AGWtPuiR8c1PeZr5r-luU8raVtq3JYmwsug/viewform?usp=sf_link) or scan for the form.



**Questions/Comments**





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# Thank you!

Please use our form for questions/feedback. If you need help related to these meetings reach out Jodi Franck [jfranck@hsri.org](mailto:jfranck@hsri.org)

If you need help from DBHDS, please e-mail [SIS@dbhds.virginia.gov](mailto:SIS@dbhds.virginia.gov)

