

QUALITY COUNCIL MEETING MINUTES

9:00 a.m. – 4:00 p.m.

Thursday March 17, 2022

Type of meeting:

Quality Council Meeting

Facilitator(s):

Theresa Skidmore

Members:

Courtney Swilley, FARF

Theresa Wyres, Small Agency Provider

Patty Houghland, Disability Rights Florida

Jill MacAlister, CDC Consultant

John Collins, Self-Advocate

Sandy Dayton, Agency Provider

Mary Jo Pirone, Self-Advocate

Latosha Obry, Self-Advocate

Veronica Gomez, Agency WSC

Dina Justice, Family Care Council Florida

Adrienne Dissis, Family Member

Absent Members:

None

APD Attendees:

Kimberly Quinn

Tom Rice

Lukas Tubeck

Caroline Shorter

JP Bell

Sheila Mott

Robin Garland

AHCA Attendees:

Cathy Cross

Qlarant Attendees:

Bob Foley
Theresa Skidmore
Charlene Henry
Katy Glasgow
Robyn Turlakis
Kristin Allen
Christie Gentry
Janet Tynes

Other Attendees:

Valerie Bradley, HSRI
Stephanie Giordano, HSRI

Scribes:

Charlene Henry, Qlarant

Acronyms:

ABC- Allocation, Budget and Control System
ADT- Adult Day Training
AHCA- Agency for Health Care Administration
ANE- Abuse, Neglect, and Exploitation
APD- Agency for Persons with Disabilities
CDC+-Consumer Directed Care
CMS- Centers for Medicare and Medicaid Services
CMS- Consumable Medical Supplies
DD- Developmental Disability
EVV-Electronic Visit Verification
FARF- Florida Association of Rehabilitation Facilities
FBI-Federal Bureau of Investigations
FCCF- Family Care Council Florida
FDDC- Florida Development Disabilities Council
FDLE- Florida Department of Law Enforcement
FSQAP - Florida Statewide Quality Assurance Program

HHS – Health and Human Services
HCBS-Home and Community Based Services
HSRI- Human Services Research Institute
iBudget- Individual Budget
I/DD- Intellectual and Developmental Disabilities
ICA – Individual Comprehensive Assessment
II- Individual Interview
LSD- Life Skills Development
LOC- Level of Care
MWEW – Medicaid Waiver Eligibility Worksheet
NASDDS - National Association of State Directors of Developmental Disabilities Services
NCI- National Core Indicators
NGQSI – Next Generation Questionnaire for Situational Information
PCR - Person Centered Review
PDR - Provider Discovery Review
QQS - Qlarant Quality Solutions
QA-Quality Assurance
QAR-Quality Assurance Reviewer
QC-Quality Council
QI-Quality Improvement
QO- Qualified Organization
SAN – Significant Additional Needs
SSRR -Service Specific Record Reviews
SC – Support Coordination
TRAIN-Training Finder Real-time Affiliate Integrated Network
WSC- Waiver Support Coordinator

Welcome & Introductions

Theresa Skidmore, Florida Director – Qlarant

Beginning at approximately 9:00 a.m., Theresa Skidmore opened the meeting. Theresa welcomed all members, guests; also provided introductions and housekeeping comments.

October 2021 Refresher with Approval of Minutes

Theresa Skidmore, Florida Director – Qlarant

Theresa Skidmore provided a refresher from the October 2021 meeting held via Zoom. Please see the October minutes for details. A motion to approve the minutes was made by Patty Houghland and seconded by Mary Jo Pirone.

APD Updates

Kimberly Quinn, Chief, Program Development, Compliance & Policy

Kimberly Quinn gave the APD Update. She has been in this role for about 4 months. JP Bell, APD Legislative Affairs Director gave the legislative update. The 2022 session ended Monday, \$112 Billion approved for the State. \$2.14 Billion will go to APD, this will include provider rate increases, waiting list, statewide dental services and support for employment services for those on the waiting list. John asked how many individuals will come off the waiting list and will it be all at once or staggered. JP said 1100 individuals will be able to come off the waitlist and it'll be staggered enrollment. The legislature used an Actuary Study Report to approve increases to get provider pay to \$15 an hour; this will be those services that are currently under \$15 an hour. Patty asked which category our provider staff fit into since we do not call them Direct Service Professionals (DSPs) and how do agencies cover the cost for bringing their staff to \$15 if rates do not increase from the AHCA (Medicaid) side. JP said AHCA and APD would have to work together on this once the Governor signs the changes into law. There was a question about stipends, retention payments and delayed egress funds. Kimberly said they are working with AHCA on sending The American Rescue Plan funds; there are no timelines on when these funds will come to providers. Any communication would come from AHCA. Sandy asked about denial and approval letters for either process. Kimberly said the delayed egress has a two-step process. She talked about billing discrepancies and how APD worked with AHCA and Qlarant on this issue with flexibility given from 1/1/22 – 6/30/22 and after additional discussion they decided to backdate that to 7/1/21. Providers will not have to payback for discrepancies related to iConnect access as long as documentation is being kept on paper. There was also an issue with Personal Supports being billed a certain way in iConnect see advisories 22-005 & 22-006 (these are on the APD website under Provider Advisories). Theresa said Qlarant would continue to cite billing discrepancies related to documentation not being completed as required in iConnect but the provider will not have to contact AHCA during the APD Remediation Process regarding the payback. Kimberly confirmed this is the case. Hillary Jackson from the Southern Region APD asked about documentation that is not present at all. Theresa said providers required to use the iConnect system who are not using it but who do have paper

documents can send them but need to be able to show their attempts to access iConnect with ongoing Zendesk/helpdesk tickets as well. Hillary asked if Supported Living Coaches and Support Coordinators are included, as the advisories only mention Personal Supports and Respite providers. Kimberly said yes, this does include those service providers. John asked have WSC rates been considered for an increase. Kimberly said she is not sure if they are being included in what the legislature approved and she would have to check on that. Patty asked are the Zendesk/helpdesks located in each region or is there a main one? Kimberly said she was not sure of that.

Jill MacAlister said she thinks the Zendesk/helpdesk is located in Tallahassee and has become more efficient over time as it concerns iConnect.

Carolyn Shorter, iConnect Training Manager, provided the iConnect Update. To date, there are 12,000 iConnect users, 775,000 provider documentation records in the system and over 500,000 are EVV activities. Supported Living providers were trained on the system last summer and went live in the system November 5, 2021. APD put 16 self-paced iConnect courses in TRAIN FL. 2,300 people have taken those courses. Personal Supports, Respite, WSC, SLC providers, APD and Qlarant staff are using the system. Billing claims are not connected to APD iConnect yet. Carolyn said keep an eye out for any advisories to stay up to date on iConnect and continue to follow the Handbook regarding requirement for services. Email iConnect@apdcares.org your questions. Kristin acknowledged recent improvements Qlarant staff noticed when using the iConnect system. Veronica said the best browser she has noticed for her is Firefox; she also asked if there is a report to check WSC notes within the system without opening each entry. Carolyn said the iConnect team is working on this report. There was also a question about administrative staff having the QA role to help review documents in the system; right now only QO supervisors can review their staff in the system. Shelia Mott said they are working on an enhancement in ID Pass to give that role to QO admin staff; no timeline for this yet.

Is there a date for Residential providers being enrolled in iConnect; Carolyn said there are no future enrollment dates right now. There was a question about QSI and iConnect functionality, as it is not working, as it should. Adrienne Dissis indicated it is not consistently copying in the text and/or filling in the bubbles on the iConnect Support Plan. Shelia Mott suggested submitting a Zendesk/helpdesk ticket with screenshots for this issue.

ICA (Individual Comprehensive Assessment) – APD continues to work through the process. John asked when it would be the official tool. The Validation Study is to begin in the next few months with 1500 people with the stated purpose to ensure the tool is valid and reliable. This is expected to start late Spring/early Summer. The tool is more in-depth, detailed and intuitive than the current QSI. Question – who trains the assessors? There will be master trainers from State Office and they will train the assessors in person statewide. APD staff must have been with the agency 6 months before they are eligible to be assessors. John asked how are you getting the people to take part in the study; is it a random

sample? Kimberly said people involved in the study will have been on the waiver at least 3yrs and it is going to be a percentage per region. Question – can the tool be shared? Tom Rice, APD said they were advised against sharing the tool at this point while it is in validation testing.

Adult Day Training – APD will be unbundling this service. This means there will be two separate services in the future; a habilitation service (Life Skills Development -LSD3) and a pre-vocational service (LSD4). As Florida is required to be in compliance with the Home and Community Based Settings rule, APD has 1 year to comply and there will be no further extensions of this rule from Centers for Medicaid and Medicaid Services (CMS). Pre-vocational service will be time limited to 36 months; no rate changes at present. There will be comment/feedback periods as the March 2023 date approaches. AHCA and APD will make the handbook changes effective October 2022. Patty noted talking with ADT providers about how they are planning to come into compliance with the rule and asked should she expect them to have an answer. Kimberly said they should be able to provide some information on this if asked. Patty asked what will/can the habilitation service look like in the future. Kent Carroll, APD staff, he said the ADT will still be a day support service and help people maintain life skills, but the wages/earnings portion will be eliminated. The new proposed service LSD4 (pre-vocational service) will be a feeder into VR and Supported Employment services. Patty said people are concerned about the sub-minimum wage portion of the day program being removed with nothing to be added in its place. Kent said they have heard that concern, and they are hoping the individuals will be able to transition into the pre-vocational service. APD knows they all will not be able to. Patty said if APD would continue to share information as this moves forward it will be very helpful for individuals and families to be able to understand. John asked is there a way APD can make other entities like Center for Independent Living (CIL) known to the individuals receiving services as opposed to just making the large paid providers known. John also asked about the negative impact of agencies closing their doors due to this change. Kimberly said APD is working through these concerns as well.

Kimberly talked about provider training. Last fall and winter, APD worked on a provider matrix. This will become included into Training Rule language. They will get stakeholder feedback as they move forward with change. APD is creating and updating training to be put into TRAIN FL. Kimberly reminded people they should not create a new TRAIN FL account if a prior cannot be accessed. The provider should contact the TRAIN FL helpdesk for assistance. Sandy Dayton asked about an actual iConnect handbook to address navigating every aspect of the system. Carolyn said there are separate guides for providers and Support Coordinators; at this time, there are no plans to merge the two into one. Question – which HIPAA should providers be taking? Kimberly said the Attain HIPAA on the Attain site is okay to take through June 30 2022. Is HIV in the News still acceptable through TRAIN FL? Kimberly did not have an answer. Where is the roster of all an agencies employees enrolled in TRAIN FL? Kimberly said to submit a request to

Gordon Brown through the TRAIN LMS and they will provide it to the agency. Some training was taken online due to Covid19 concerns, are those trainings okay until they expire? Please consult the advisories in place during the pandemic for the flexibilities in place at that time and contact Gordon Brown with additional questions.

Kimberly addressed concerns regarding 30-day notice and providers. She referenced the Rule 65 G-3.005; provider cannot terminate service until 30 days after the individual and/or guardian receive the notice. WSCs are being made aware of notices providers send to end services and coordinators must notify providers of negative changes to their service authorizations. What about residential providers who are closing, do they have to stay open for 30 days? Kimberly said she would have to speak with Lorena for more information. Patty said some people with behavioral challenges are getting notices and they cannot find another residence which is causing a lot of anxiety and concern for families. This is happening in the Baker Act facility scenario more often. Lynne Daw, APD acknowledged APD is aware of the concerns and are licensing new homes monthly. APD is aware part of the issue is provider staffing barriers. There will be a provider development workgroup to discuss serving individuals who are having a hard time finding placement. Some of the organizations in the group are from out-of-state. Tom mentioned they are also looking at successful models in the NE Region right now, as these models provide a smaller setting with 24-hour supervision to help people be supported and successful. Patty suggested we officially make provider staff, DSPs to attract a different caliber of employee since we are losing staff to employers with less stress. Veronica noted having a hard time finding placement for someone with behavior challenges; nothing has been found to date and the person is at home with his mother in a dangerous situation. Courtney Swilley said FL ARF has been working with the Alliance of Direct Support Professionals to advocate getting a standard of classification for DSPs through the legislature. The Legislature only votes on this once every 10 years. FL ARF has developed and conducts a Direct Support Professionals Apprenticeship Program. However due to staff shortages and those in the program needing to pull extra shifts it was paused. Tom noted the ICA would help APD see where the greatest provider needs are. Adrienne spoke about the need for providers/staff as it relates to CDC+ program and the need for more education in this area.

Scorecards – Kimberly asked for feedback from WSC on how to improve. Veronica said she'd like to access those scorecards and to be send them to the individuals to ensure they are getting the invite and be able to follow-up on these. She said a more user friendly version would be helpful such as a paper version or similar. Patty said she gets a lot of information during the Support Plan meeting and she recalls getting the invite, but by the time she went to do it the link expired. She said a reminder a week after the meeting might help. Adrienne said sending the invite from the QO owner and not the specific WSC might reduce some of the coaching from coordinators to the individuals to

provide a good rating. Tom said one of the plans for the WSC scorecard is to include QIarant review scores and expand to all provider types.

Human Services Research Institute (HSRI) Presentation

Valerie J. Bradley, President Emerita & Stefanie Giordano, NCI Co-Director

Valerie Bradley presented information on *What NCI Data Tell Us About The Experiences of Florida Families During the Pandemic* by first reviewing the basics of the Adult Family Survey (AFS). She touched on the demographics, levels of support need, preferred language, age and health of respondents. Valerie then talked about income, financial challenges, emergency planning and natural supports. She discussed data gathered on additional services needed, reductions in service, overall feeling about services and key takeaways. Florida will do the mail-out survey July 2022-June 2023. She has noticed self-directed services experienced an uptick in enrollment during the pandemic. Theresa said the same has been true for Florida. Theresa asked Valerie about the HCBS Settings rule. Valerie said states need to continue to look at how to provide more tailored services for competitive employment or other meaningful activities to assist people to work including family members.

Please see presentation slides for more details.

APD Critical Incident Reporting and Management

Robin Garland, Incident Report Manager

Robin Garland covered Critical Incident Reporting and Management. Robin highlighted the number of critical incidents reported by APD region for 10/1/21–12/31/21. 329 critical reports were submitted for this timeframe. She discussed what has been reported for the first half of the fiscal year: 723 reported from 7/1/21 – 12/31/21. Robin talked through the types of critical incidents and provided the individual numbers for each. Theresa asked if trends were running higher or lower. The most reported incidents by region were:

- Central's 17 unexpected death,
- Northeast's 20 life threatening,
- Northwest had two categories - 8 verified finding and unexpected death,
- Southeast's 15 life threatening,
- Southern's 19 life threatening, and
- Suncoast's 19 life threatening.

She said some of the unexpected deaths include death from Covid19. These numbers are higher as compared to the 2019 and numbers are on par with 2020. Robin talked about the 2019 year, prior to Covid19 pandemic and how life threatening, unexpected death and sexual misconduct categories were the highest critical incidents reported. She reviewed the 3494 reportable incidents for the period 10/1/21 – 12/31/21. Most reported reportable events were ER/Hospital, Baker Acts and Client injury. By regions, NW 291, NE 608, Central 817, Suncoast 894, SE 655 and Southern 228. Theresa asked do they look at the proportion of reports based upon the number served by region. Robin said they do look at it. She also noted they keep information about client on client, provider on client, and client on provider sexual misconduct and assault.

Qlarant Updates

Theresa Skidmore, Program Director

Dr. Katy Glasgow, Scientist

Theresa talked about staff role changes, retired and new staff, as well as open positions in Suncoast, Southeast and Northeast regions. Changes to the Operations Manual, took effect January 2022. Theresa discussed the criteria for the two review formats in place now, and how these processes work. CDC+ Reps have the option to complete the review as a Desk Review or have an Onsite Review. See the Qlarant Policies and Procedure manual online for more details. Observations for day programs and residential settings have resumed (interviews can be done in these setting now). Theresa discussed individual interviews for PCRs, PDRs and NCI survey. A PowerPoint presentation will be posted to highlight the updates. Qlarant will be conducting a training in every region. This will include a session for Support Coordinators and one for Providers. Dates and venues to be announced on the Qlarant website. The Quality Council currently has vacancies for members of day programs and residential providers. Interested provider should email, johnsonch@qlarant.com to request membership and AHCA approval. QC will return to in person meetings in July 2022.

Qlarant conducted a Pilot with an Exceeds Record Review Tool for Support Coordinator Standards. Theresa discussed the scoring methodology and provided the history regarding the decision for the pilot. Theresa explained the Exceeds Standards would show where the Support Coordinator excelled within the 11 proposed standards. These 11 Standards had 53 exceeds reasons. Jill asked how providers have been doing with their Qlarant review since moving to the electronic documentation system. Theresa said there has been a noticeable drop in scores with Support Coordinator record reviews for the period, late October 2021 – February 2022. Average scores are approximately 89%. Theresa said trends include “canned” notes, apparent cut-n-paste and plans with generic language without the names of individuals. Jill and Veronica s feel there is a

negative tone coming across from APD. Veronica said she also feels there is a systemic problem with the implementation of the QO, since requirements are being put on the organization as a whole. She provided an example about people choosing a new coordinator and how extra work is being generated because of the system when it used to just be a phone call to the APD Region to get another coordinator. She suggested a workgroup to improve support coordinator systems to improve the quality of services to the individuals. Theresa presented a brief overview of the Exceed Tool and noted how the tool language is written in the positive statements as opposed to how not met reasons are written. Katy Glasgow talked in depth about the proposed scoring, breaking it down into Compliance (85%) and Quality (15%) and the resulting data from the pilot. Katy ran the scoring as Compliance 90% & Quality 10% as well to see the variations. There were 11 QOs included in the pilot from across the state resulting in 84 records scored using the Exceeds Tool. John said he feels there are too many things being pressed upon Support Coordinators right now and it is impacting service quality. His coordinator is threatening to quit frequently and he has been in business a long time. Patty is concerned the current state of Support Coordinators duties is at a point coordinators feel crushed. Veronica and Adrienne echoed the same sentiment. They like the concept of the Exceeds tool but it is not the right time to implement. Jill said the difference between providers and support coordinators appears to be coordinators' livelihood are being put on the line for not completing documentation and system tasks more often than other provider types. Adrienne said she and other coordinators used to feel supported by APD to work with the individuals and she feels the team concept has been lost. APD and AHCA will be meeting to determine the next steps for the Exceeds Tool. She said there is still a lot to be decided. Patty noted the Support Coordinators appear to be in a fragile state emotionally and mentally right now and stakeholders need to figure out how to support the system.

Qlarant Data Presentation

Dr. Katy Glasgow, Scientist

Katy talked about the PCR and PDR reviews. She noted PCR data goes from October 2021 – December 2021, PDR data goes from July 2021 – December 2021. Katy started out reviewing the PCR data (Waiver and CDC+) highlighting the demographics and the interview data noting Outcomes vs. Supports with the lowest scoring Outcomes. She reviewed the Health Summary, focusing in on the medications, which have increased over the last 3 years and significant health events. John asked if reactive strategies automatically means restraints. Kristin noted reactive strategies are use of some form of behavioral emergency intervention. Katy talked about PDR data noting scores by Region in each review component. She discussed changes to the setup of the Administrative Tool. Katy reviewed the General Administrative standards and scores by Region and

Provider Type. She discussed the Qualifications & Training standards and scores by Region and Provider Type. Katy went over the service specific record review scores, percentage of providers with billing discrepancies and rounded out the presentation with Alerts cited during reviews.

Please see presentation slides for more details.

Quality Council Follow-Up & Next Steps

Theresa Skidmore, Florida Director – Qlarant

Possible workgroups related to DSP classification and Support Coordination system improvements.

Attachments:

October 2021 Minutes

Qlarant Data Presentation

HSRI Presentation