

Ryan White Part A Central Eligibility Transition Plan

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Comments

GREEN

Goal 1: *To prepare for maximized integration of new Central Eligibility Provider and practices with minimal miscommunications, misunderstandings and gaps.*

GREEN

Objective 1: Develop close communication through initiation of CE process

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Status	Goal. Obj. Action	Activity	Staff &	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			
GREEN	1.1.1	Establish schedule of meetings to include at a minimum every other week meeting until full CE implementation+ 6 weeks w/ timeline	Jen Hawkins	7/1/2011	8/10/2011	100%	-	-	-
GREEN	1.1.2	Establish schedule of meetings to include at a minimum weekly until full CE implementation	Jen Hawkins	7/1/2011	8/10/2011	100%	-	-	-
GREEN	1.1.3	Establish schedule of meeting to include at a minimum monthly from 6 weeks to 6 months.	Jen Hawkins	7/1/2011	8/10/2011	100%	-	-	-
GREEN	1.1.4	Review contract requirements. Billing/capacity building	Jen Hawkins	7/1/2011	8/10/2011	100%	-	-	-
GREEN	1.1.5	Review all agencies for CE challenges/exceptions	Carmen Batista	7/1/2011	8/10/2011	100%	-	-	-
GREEN	1.1.6	Solicit input from CEP on Transition Work Plan	Jen Hawkins	7/1/2011	8/10/2011	100%	-	-	-
GREEN	1.1.7	Solicit input from CEP on Eligibility Policies, Forms and model	Carmen Batista	7/1/2011	8/10/2011	0%	-	-	-
GREEN	1.1.8	Develop protocol for reporting QM indicators	Erica TeKampe	7/1/2011	9/1/2011	0%	-	-	-

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Objective 2: Develop plan for CEP monitoring

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Status	Goal. Obj. Action	Activity	Staff &	Timeline			Desired Outcome	Performance Metric	Comments
			Allocation (FTE)	Lead(s)	Start Date	End Date			
GREEN	1.2.1	Train new MA on CE reports	Deanna Feintuch	7/1/2011	8/19/2011	0%	New MA will be able to run and understand CE reports.	New MA demonstrates ability to run all reports under Dee Feintuch's supervision.	-

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GREEN	1.2.2	Review CE changes with TriYoung and request any needed changes to CE reports	Carmen Batista & Jen Hawkins???	7/1/2011	9/9/2011	0%	Julie will leave meeting with concise list of requests and timelines.	List of questions and timelines	Need to adapt for new non-eligible policy. Is some of this already being done at the weekly Julie meetings?
GREEN	1.2.3	Determine protocol for running CE Packet Processing Report	Jen Hawkins	7/1/2011	9/1/2011	0%	New MA will be able to run the report and submit to the staff member in charge of monitoring.	Draft of procedure including submission in the MA desk manual.	-

GREEN Objective 3: Prepare Part A office for CE transition

Status	Goal. Obj. Action	Activity	Staff & Allocation (FTE)	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			
GREEN	1.3.1	Review new CE model with the Part A office	Carmen Batista	7/1/2011	8/25/2011	50%	Identify gaps and address	Meeting to present information to Part A office	-
GREEN	1.3.2	Discuss impact of CE on Fiscal, Admin, QM and site visit responsibilities	Jen Hawkins	7/1/2011	9/1/2011	10%	Identify gaps and address	Full staff meeting to discuss impact.	-
GREEN	1.3.3	Finalize eligibility policy, forms	Carmen Batista	7/1/2011	9/9/2011	75%	Final, approved forms to be released with 2011 Clarification	Final approved forms	Spanish translations are going to be difficult to turn around
GREEN	1.3.4	Review eligibility policy, forms and model with Part A office	Carmen Batista	7/1/2011	9/15/2011	0%	Technical Review of documents	Final, approved forms.	Ideally done at same time as the CE model review? 3 hour meeting.
GREEN	1.3.5	Determine other payer screening requirements for non CEP	Rose Conner	7/1/2011	9/1/2011	0%	Clear multi-service category guidance regarding the 3rd Party screening expectations.	Table included in CE policy	-
GREEN	1.3.6	Develop Part A protocol for monitoring QM indicators	Carmen Batista	7/1/2011	9/22/2011	0%	Plan how the various QM indicators will be collected, reviewed and addressed.	Protocol to be added to Job Manual of applicable parties	-
GREEN	1.3.7	Review CAREWare billing requirements for CE, during capacity building and after full implementation	Jen Hawkins	7/1/2011	9/1/2011	0%	Determine CE Billing philosophy. Identify gaps and address.	Billing team is notified. Determined codes are entered into CAREWare.	Need to be in place for partial implementation phase

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GREEN Objective 4: Integrate the CEP into the Phoenix EMA Continuum

Status	Goal. Obj. Action	Activity	Staff & Allocation (FTE)	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			
GREEN	1.4.1	Develop regular, monthly calendar of visits or accomodations for all provider sites.	Erica TeKampe	7/1/2011	10/1/2011	0%	Providers requesting on site CE services will have them.	Visitation schedule implemented on 10/1	Schedule is a 3 month pilot. Will review for utilization after.
GREEN	1.4.2	CEP to meet with each Ryan White Part A provider and introduce, discuss agency services, agency strengths, logistics/needs of onsite CE	Carmen Batista/Deanna Feintuch	7/1/2011	8/15/2011	100%	Enhance provider involvement in CE while assessing possible challenges	Collection of survey from ALL providers	-
GREEN	1.4.3	Gather structured input from providers regarding brochure	Carmen Batista/Deanna Feintuch	7/1/2011	8/15/2011	100%	Collect logistical information.	Collection of survey from ALL providers	-
GREEN	1.4.4	Draft brochure and submit for Phoenix EMA review and revision	Deanna Feintuch	7/1/2011	9/1/2011	100%	Develop tool to be used for referrals	Completion of draft brochure	-
GREEN	1.4.5	Finalize brochure	Carmen Batista	7/1/2011	9/9/2011	75%	Develop tool to be used for referrals	Complete brochure	-
GREEN	1.4.6	Develop script for referral process	Carmen Batista	7/1/2011	9/9/2011	0%	REMOVE???	REMOVE???	Not applicable if using the brochure?
GREEN	1.4.7	Introduce CEP to Planning Council	Rose Conner	7/1/2011	10/1/2011	0%	Formal introduction of CE Provider	Presentation of CE leadership at Planning Council	-
GREEN	1.4.8	Introduce CEP to All Provider Meeting	Rose Conner	7/1/2011	9/27/2011	0%	Formal introduction of CE Provider	Presentation of CE leadership at All Provider Meeting	-
GREEN	1.4.8	Review Eligibility policy and forms with Part A program	Carmen Batista	7/1/2011	9/22/2011	0%	Provide orientation to the Part A providers on CE responsibilities, non-CE responsibilities and client responsibilities	Present forms at All Provider Meeting	-

GREEN Objective 5: Complete Part A Technical Assistance

Status	Goal. Obj. Action	Activity	Staff & Allocation (FTE)	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			

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GREEN	1.5.1	Provide technical assistance on implementation of eligibility policy, forms and model with CE transition team	Carmen Batista	7/1/2011	10/1/2011	0%	Create shared understanding on the CE model and related forms	Complete all provider presentation and review of new policy and forms	CE leadership may disseminate information to staff
GREEN	1.5.2	Provide technical assistance on implementation of Risk Acuity Assessment to include at minimum: purpose of document, expected time to complete, interviewing tips, associated referral requirements	Ken Leighton-Boster	7/1/2011	10/1/2011	45%	Create shared understanding of the implementation of the Risk Acuity Assessment	Complete training on Risk Acuity Assessment	DISCUSS W/ KEN: Can leadership disseminate information?
GREEN	1.5.3	Develop PowerPoint for use with Planning Council and non-CEPs	Carmen Batista	7/1/2011	9/27/2011	60%	Develop presentation outlining model and implementation	Completed PowerPoint	Waiting on some policy clarifications.
GREEN	1.5.4	Provide technical assistance to providers regarding: new model, referral expectations, non CEP requirements, how non CEP can help	Carmen Batista	7/1/2011	9/27/2011	0%	Create shared understanding of non CE Provider expectations and responsibilities related to eligibility	Deliver CE Presentation at all provider meeting	-
GREEN	1.5.5	Provide technical assistance to CEP regarding new CE practice (uploading documents, etc)	Julie Young	7/1/2011	9/27/2011	0%	Provider will be able to upload CE documents into CAREWare	Provision of directions for uploading documents to CAREWare	-

GREEN Objective 6: Update CAREWare to reflect new CE practices

Status	Goal. Obj. Action	Activity	Staff & Allocation (FTE)	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			
GREEN	1.6.1	Request TriYoung to import the new CE f	Carmen Batista	7/1/2011	9/27/2011	0%	CE forms are updated in CAREWare	Updated forms	Forms should be functioning by 10/1/2011
GREEN	1.6.2	Determine CAREWare billing requiremen	Jen Hawkins	7/1/2011	9/1/2011	50%	Finalize CE billing policy	Case Management policy reflects CE billing	-
GREEN	1.6.3	Update CE, Case Management policies v	Jen Hawkins	7/1/2011	9/1/2011	0%	P and P distributed at all provider meeting will contain current information .	Case Management policy reflects CE billing	-
GREEN	1.6.4	Review CE changes with TriYoung and request TriYoung to implement any needed changes to the CE reports	Carmen Batista	7/1/2011	9/9/2011	0%	TriYoung receives information on what system changes are needed.	Meet with TriYoung to review model/needed changes	Schedule meeting

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GREEN	1.6.5	Add any new CE codes to CAREWare (ICI service, billing codes, etc.)	Carmen Batista	7/1/2011	9/1/2011	50%	CE Provider will be able to use CAREWare to bill appropriately.	Updated codes in CAREWare	Waiting on final determination from Rose and Jen	
GREEN	1.6.6	Upload all existing HIV documents to CAREWare	Jen Hawkins	7/1/2011	10/31/2011	0%	All documents will be uploaded and viewable by all providers in CAREWare	HIV document upload is complete	Is this from the S Drive?	
GREEN	1.6.7	Collect CAREWare User Agreements from CEP and add to CE domain	Deanna Feintuch	7/1/2011	8/15/2011	50%	Ensure proper permissions and access	All CE leadership and staff have appropriate access to CE domain	Leadership complete.	
GREEN	1.6.8	Review new referral process	Julie Young	7/1/2011	10/31/2011	0%	Part A office to understand new referral system	Julie presentation to part A staff	-	
GREEN	1.6.9	Open utilization to all case management agencies	Julie Young	7/1/2011	10/1/2011	0%	Case Managers will be able to review client services for Part A funded activities	Open utilization in CAREWare	-	

GREEN Objective 7: Contract Compliance

Status	Goal. Obj. Action	Activity	Staff & Allocation (FTE)	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			
GREEN	1.7.1	Desk Top Manual (DTM): Addresses 2 way communication with other providers	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	Need draft by due date
GREEN	1.7.2	DTM: Tracking and date all inquiries w/ dates and response and nature of communication	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.3	DTM: Data mismatch and resolution. Must be completed within 10 days and utilize a log	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.4	DTM: Application/renewals any eligibility materials are available to any individual or agency requesting them	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.5	DTM: Returned mail must be resolved within 7 days	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-

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GREEN	1.7.6	DTM: Procedure for printing and mailing application and renewal forms. Contractors' mailing address must be on envelopes contractor distributes.	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.7	DTM: Materials distributed must be at 8th grade level or lower	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.8	DTM: Procedure for completing eligibility must address- 7 days to finish processing eligibility after receipt of Complete and correct packet to include Health-E application, 3rd party payer, referrals, face to face during initial meeting, how to contact clients regarding missing information (to include at least one written contact), timelines	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.9	DTM: Procedure identifying time frames for new and existing clients	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.10	DTM: Addressing accuracy/completion requirements	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.11	DTM: Addressing 3rd Party payer	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.12	DTM: Procedure addressing referrals	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.13	DTM: Addressing face to face during initial meeting	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.14	DTM: Addressing how to contact clients regarding missing information (should include at least one written contact)	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.15	DTM: Documentation must be kept in central file	Erica TeKampe	7/1/2011	9/1/2011 check RFP chart	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-

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GREEN	1.7.16	Develop training for new hires that includes technical and programmatic modules	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.17	DTM: Training must be completed prior to assuming job duties	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Desk Top Manual	Draft addresses identified topic(s).	-
GREEN	1.7.18	Develop Initial Training that addresses Part A Program and relevant policies, the CE desktop manual, customer service, cultural competency, eligibility systems, business continuity and recovery plan	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Initial Training Curriculum - to be used with initial employees	Draft addresses identified topic(s).	-
GREEN	1.7.19	Develop annual trainings that address cultural sensitivity, Health insurance portability and accountability and security act,	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Annual Training Curriculum	Draft addresses identified topic(s).	-
GREEN	1.7.20	Develop annual trainings that address Health Insurance Portability and accountability	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Annual Training Curriculum	Draft addresses identified topic(s).	-
GREEN	1.7.21	Develop annual training that addresses security requirements	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft Annual Training Curriculum	Draft addresses identified topic(s).	-
GREEN	1.7.22	QM plan outlines the procedures for the performance measures for customer service	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft QM Plan	Draft addresses identified topic(s).	-
GREEN	1.7.23	QM Plan addresses timely disposition of applications (7 days)	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft QM Plan	Draft addresses identified topic(s).	-
GREEN	1.7.24	QM plan addresses accuracy of eligibility (97%) and monitoring calls	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft QM Plan	Draft addresses identified topic(s).	-
GREEN	1.7.25	QM Plan identifies that results of quarterly customer service review are due 20 days after the end of the quarter	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft QM Plan	Draft addresses identified topic(s).	-

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GREEN	1.7.26	QM Plan addresses how contractor is to review eligibility determinations made by all employees during first 6 months of employment and samples of othe employee's determinations are made on an ongoing basis.	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft QM Plan	Draft addresses identified topic(s).	-
GREEN	1.7.27	QM Plan address how results of the eligibility accuracy review are to be submitted to Part A on monthly basis, 20 days after end of month.	Erica TeKampe	7/1/2011	9/1/2011	0%	Draft QM Plan	Draft addresses identified topic(s).	-

GREEN *Goal 2: To seamlessly initiate new Central Eligibility transition with minimal impact to Phoenix EMA Ryan White clients*

GREEN **Objective 1:** Central Eligibility Provider to provide documentation of Eligibility practices and exceptions.

Status	Goal. Obj. Action	Activity	Staff & Allocation (FTE)	Timeline			Desired Outcome	Performance Metric	Comments
			Lead(s)	Start Date	End Date	% Complete			
GREEN	2.1.1	CAREWare 101	-	-	-	-	-	-	UNNECESSARY?
GREEN	2.1.2	Billing Training	-	-	-	-	-	-	HANDLED DURING TRANSITION?
GREEN	2.1.3	CAREWare Domain established and billing codes created	-	-	-	-	-	-	DUPLICATE?
GREEN	2.1.4	Completion and Collection of CAREWare forms	-	-	-	-	-	-	DUPLICATE?
GREEN	2.1.5	Successful completion of VPN/CAREWare set up	-	-	-	-	-	-	DUPLICATE?
GREEN	2.1.6	Collection and Review of Capacity Building Forms	-	-	-	-	-	-	UNNECESSARY?
GREEN	2.1.7	Partial Implementation with Care Directions	Debby Elliot	9/1/2011	9/31/2011	0%	New CE processes will be implemented at Care Directions as is possible	CE processes all of Care Directions' eligibility	Some forms/pieces will still be in process
GREEN	2.1.8	Full EMA implementation	Debby Elliot	10/1/2011	10/31/2011	0%	CE processes eligibility for EMA	CE processes eligibility for EMA utilizing new forms and processes	-

Phase	Objective	Task
Phase 1	Develop close communication through initiation of CE process	<ul style="list-style-type: none"> Establish schedule of meetings to include at a minimum every other week meetings until full CE implementation + 6 weeks. Establish schedule of meetings to include at a minimum weekly until full CE implementation Establish schedule of meeting to include at a minimum monthly from 6 weeks to 6 months. Solicit input from CEP on Transition Work Plan Solicit input from CEP on Eligibility Policies, Forms and model Develop protocol for reporting QM indicators Review all agencies for CE challenges
Phase 1	Develop plan for CEP monitoring	<ul style="list-style-type: none"> Train new MA on CE Reports Review CE changes with TriYoung and request any needed changes to CE reports
Phase 1	Prepare Part A office for CE transition	<ul style="list-style-type: none"> Review new CE model Discuss impact of CE on Fiscal, Admin, QM and site visit responsibilities Review Eligibility policy and forms with Part A program Finalize eligibility policy, forms Review eligibility policy, forms and model with Part A office Determine other payer screening requirements for non CEP Develop Part A protocol for monitoring QM indicators
Phase 1	Integrate the CEP into the Phoenix EMA Continuum	<ul style="list-style-type: none"> Develop regular, monthly calendar of visits or accommodations for all provider sites CEP to meet with each Ryan White Part A provider and introduce, discuss agency services, agency strengths, logistics/needs of onsite CE. Gather structured input from providers regarding brochure. Draft brochure and submit for Phoenix EMA review and revision Finalize Brochure Develop script for referral process Introduce CEP to Planning Council Introduce CEP to All Provider Meeting
Phase 1	Complete Part A Technical Assistance	<ul style="list-style-type: none"> Provide technical assistance on implementation of eligibility policy, forms and model with CE transition team Provide Technical Assistance on Implementation of Risk Acuity Assessment to include at minimum: purpose of document, expected time to complete, interviewing tips, associated referral requirements. Provide Technical Assistance to providers regarding: new model, referral expectations, non CEP requirements, how non CEP can help Provide Technical Assistance to CEP regarding new CE practice (uploading documents, etc.) Develop PowerPoint for use with Planning Council and non-CEPs

Phase	Objective	Task
Phase 1	<p>Update CAREWare to reflect new CE practices</p>	<p>Request TriYoung to import the new CE forms</p> <p>Review CE changes with TriYoung and request TriYoung to implement any needed changes to the CE reports.</p> <p>Add any new CE codes to CAREWare (ICI service)</p> <p>Upload all existing HIV documents to CAREWare</p>
		<p>Collect CAREWare User Agreements from CEP and add to CE domain</p> <p>Review new referral process</p> <p>Open referrals to all providers and utilization to all case management agencies</p>
Phase 1	<p>Contract Compliance</p>	<p>Ensure that contractual specifics are met (i.e. phone line, Health-E Arizona, etc.)</p>
Phase 2 and 3	<p>Central Eligibility Provider to provide documentation of Eligibility practices and exceptions.</p>	<p>Review at regular meetings (every other week)</p> <p>Establish document as reference guide for future CEP staff</p> <p>Monitor CEP for quality indicators</p> <p>Determine schedule for Part A CE document review</p> <p>Monitor referrals and enrollments at all agencies</p>