



# Life Choices Statewide Meeting

Meeting with PAS Agency, Service Providers and DD Staff  
11/12/2014  
10:00 AM to 3:00 PM

•Vision Statement: All children and adults with developmental disabilities living in Illinois receive high quality services guided by a Person-Centered Plan that maximizes individual choice and flexibility in the most integrated setting possible. All areas of the State have available a full array of services that meet the needs of children and adults with developmental disabilities living in their local communities regardless of intensity or severity of need. There is no waiting list for services.

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# PUNS and HCBS Enrollment

- **Purpose:**
  - Develop an action plan to respond to feedback received from the PUNS listening tours.
- **Tasks Completed:**
  - We convened 4 meetings; 3 in-person, held in Springfield, w/Celia Feinstein in attendance, and 1 Conference Call.
  - We made 32 recommendations with 100% consensus; We initially placed our teams recommendations to the 4 quadrants as noted below (but their placement have and continue to be adjusted).
    - Q1 -13 High Impact/Low Do-ability,
    - Q2 -18 High Impact/High Do-ability,
    - Q3 -0 Low Impact/Low Do-ability,
    - Q4 -1 Low Impact/High Do-ability

# PUNS and HCBS Enrollment

- **Membership – 15 members**
- **Facilitator: Celia Feinstein, CFA, Inc.**
- **Chairperson: Jane Nesbit, ISC/DDSME**
- **Communicator: Michelle Tibbs, ISC/WISC**
- **Liaison: Reta Hoskin, DHS/DDD**
- **Members: Terry Cremer, AID/Provider, Leslie Hart, ISC/DayOne Network, Betty Jackson, Envision Provider/Unlimited, LeAnndra Keltner, ISC/CISA, Missy Kichline Family/Family Support Network, Alisha O'Boyle, ISC/LCMHB, David Ogunbode, ISC/CSO, Teresa Positano, ISC/Options&Advocacy, Carolyn Racki ISC/PACT, Mary Kaye Speidel, ISC/SICCS, Cindy Sullivan, ISC/Options&Advocacy**
- **1 Family Member, 3 Providers, 9 ISC's 1 SME, 1 DHS/DDD Rep**

# PUNS and HCBS Enrollment

- **Recommendations –**

Recommendations fell into 6 categories:

- I            PUNS OUTREACH & EDUCATION    (6) recommendations
- II           PUNS COMPLETION                    (6) recommendations
- III          PUNS UPDATES                        (6) recommendations
- IV          PUNS CLOSING                        (6) recommendations
- V           PUNS Instrument Revision           (6) recommendations
- VI          PUNS TRAINING                        (2) recommendations

# Recommendations

## ○ I. PUNS OUTREACH & EDUCATION –

- Use the DHS Memo dated 7/1/14 as an outline for individual agency PUNS outreach plans encompassing all aspects requested by Director Casey. Additionally, submit an outreach activity calendar for FY15 and FY16.
- ISC Agencies need to substantiate activity and provide documentation that describes the effort to build stronger relationships with and between our Agencies and local TPC's, ORS/STEP programs, Public School Districts, and Private School Programs that includes PUNS awareness & enrollment.
- ISC Agencies need to substantiate activity and provide documentation that describes the effort to build stronger relationships with and between our Agencies and Traditional & Non-Traditional providers of support that includes PUNS awareness & enrollment.
- ISC Agencies need to substantiate activity and provide documentation that describes the effort to build stronger relationships with and between our Agencies and Special Populations (including the autisms community), that encompasses cultural diversity, and underserved and minority populations, that includes PUNS awareness & enrollment.
- ISC Agencies when and where appropriate will encourage individuals to apply for Medicaid during outreach activities.
- ISC Agencies when and where appropriate will encourage individuals to apply for SSI at age 18 during outreach activities.

# Recommendations cont.

## ○ II. PUNS COMPLETION –

- All Initial PUNS should be completed face-to-face at the location of the individual/family's choosing.
- Require all PUNS to be signed by individual and/or guardian except for Express PUNS. (exception: closing PUNS due to being unable to locate and individual/guardian)
- All ISC Agencies will use standardized scripts for letters and phone calls and those scripts will be made available through the revised PUNS Manual.
- All ISC Agencies will use the revised PUNS Manual guidelines to determine who is eligible for PUNS enrollment and who is required to be present to complete the enrollment process. An example; Individuals 12 and older should be encouraged to participate in the PUNS completion meeting. ISC Agencies should reschedule the PUNS meeting if necessary to accommodate attendance by the individual and/or family.
- ISC Agencies when and where appropriate will encourage individuals to apply for Medicaid during PUNS completion.
- ISC Agencies when and where appropriate will encourage individuals to apply for SSI at age 18 during PUNS completion.

# Recommendations cont.

## ○ III. PUNS UPDATES –

- **All ISC Agencies will require annual face-to-face updates for those in the emergency category and for those requesting to move from critical to emergency category. If an ISC starts an update by phone and determines a change to the emergency category exists, the PUNS update should stop and MUST be completed at a face-to-face meeting. For those individuals with PUNS in the planning or critical categories, the PUNS update may be done by phone, mail, fax, or email as long as the opportunity for a face-to-face meeting was offered to the individual/guardian/family member.**
- **All ISC Agencies should take the primary responsibility for PUNS updates, but there is an expectation that there is a “shared responsibility” with the family.**
- **DHS will revise the language in the “annual update letter”. The language will be simple, straightforward, and they will add a sentence in multiple foreign languages near the bottom of the update letter that will explain if interpreter services are necessary or they want a letter sent in an alternate language, they can check a box and return the letter with their request. The ISC Agency will then be responsible to reach out to that particular family in the alternative method requested.**
- **Within the context of the annual update letter DHS will include the numbers of new individuals/families served in order to substantiate the movement of people “on” the waiting list moving “off” the waiting list and thus encouraging new participation.**
- **All ISC Agencies and DHS generated correspondences will include standard statements on all forms/letters related to PUNS, “if your address or phone number changes, please let us know”.**
- **In the revision of the PUNS tool it will contain a statement with a check box for the individual/guardian to attest to the fact that a face-to-face meeting was offered (including alternative locations), but they choose to complete the annual update by telephone, mail, email, or fax.**

# Recommendations cont.

## ○ IV. PUNS CLOSING -

- DHS/DDD will send a PUNS update letter 90 days prior to the update due date.
- ISC Agencies will make a 1<sup>st</sup> phone call or text to identify the need to update PUNS 60 days prior to the update due date.
- ISC Agencies will make a 2<sup>nd</sup> phone call or text (if no response) 1-2 weeks following the 1<sup>st</sup> phone call at varying days and times.
- ISC Agencies will send a letter or email (if still no response) 45 days prior to the PUNS update due date stating that the person's record will be closed if there is no response in 30 days.
- ISC Agencies will send a 2<sup>nd</sup> letter or email (if still no response) 2 weeks after the 1<sup>st</sup> letter stating the case will be closed if there is no response in 14 days.
- ISC Agencies may close the PUNS record (if still no response) 2 weeks after the 2<sup>nd</sup> letter or email is sent.



# Recommendations cont.

## ○ V. INSTRUMENT REVISION

- An “Express PUNS” should be created for those individuals who will be served through the crisis process; hence, information will be captured yet it will not be perceived that those individuals are waiting for services. Revise the PUNS tool to contain a checkbox for “Express PUNS” for people who do not need to be selected from PUNS to request funding such as having a crisis funding packet submitted, ICF/DD downsizing, SODC downsizing, DCFS wards aging out, and Bogard Class members. Abbreviated information to be completed and guidelines will be included in the PUNS manual.
- Develop a grid so that an urgency of need is attached to each service requested.
- Review all service definitions used in the PUNS tool to assure consistency with the services and supports Illinois provides and recognizes.
- Revise the PUNS tool to include a statement as to whether the individual for whom the PUNS was completed participated in the PUNS meeting; and if not why not.
- DHS/DDD should update the currently used consent form to include electronic communication and remove the witness signature line.
- We must assure that once the instrument and process are revised the manual MUST also be revised. We must ALL be ALL in.

# Recommendations cont.

## ○ VI. PUNS TRAINING

- **DHS/DDD will mandate and coordinate annual training on the use of the revised PUNS tool, revised PUNS process, and revised PUNS manual as changes are available and uniformity are expected, especially if changes are developed and implemented in waves.**
- **DHS/DDD will provide ongoing ROCS training.**

# PUNS and HCBS Enrollment

- **Next Steps**

- Our Team is committed to the additional and ongoing “sub-committee” work it will take to assure that our recommendations become reality and contribute to “real change”.
- Our Team is committed to PUNS being more than a waiting list and a method to enroll individuals onto a waiting list.
- Our Team is committed to making PUNS Outreach & Education, PUNS Completion, PUNS Updates, PUNS Closings, PUNS Instrument Revision, and PUNS Training be meaningful, and with consistent methodology, be important, so that individuals needs can’t and won’t be ignored.
- Our Team believes that the 20,000 thousand individuals identified and the 20,000, 30,000, 40,000 thousand more people who have yet to be identified need access to the knowledge that ISC Agencies can provide given the means, that schools can provide given the means, and that communities can provide given the means, when we all work together.