**Please be patient while we adjust attendees' permissions and promote to panelist, so that everyone can use audio and video.

State of New Hampshire
Department of Health and Human Services

Division of Long Term Supports and Services
Bureau of Developmental Services (BDS)

SIS-A™ Scheduling Staff
Information Session
July 2022

Agenda

- Introductions

- Zoom Etiquette

- Sample Overview

- Scheduling Walkthrough

- Next Steps

Introructions

- State Team

- American Association on Intellectual and Developmental Disabilities (AAIDD)

Zoom Etiquette

1. Please mute if you are not presenting or asking a question

2. We will pause for questions throughout the presentation

3. We hope to use this time to share information with people who will be working to schedule SIS-A assessments as a part of this sample. Please hold your questions until the end if you *are not* going to work on scheduling.
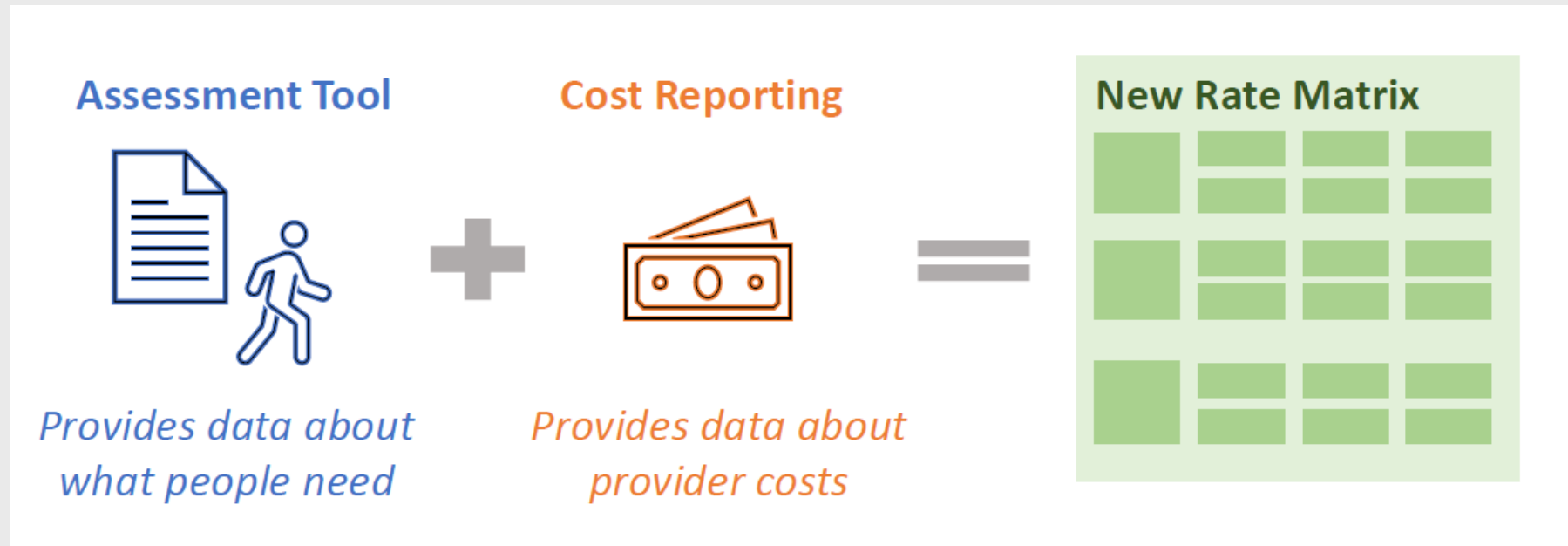
Sample Overview

The Bureau of Developmental Services (BDS) needs data about the supports that people need to inform a new rate methodology. These new rates are meant to better fund services throughout New Hampshire.

Assessment Tool — *Provides data about what people need*

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Cost Reporting — *Provides data about provider costs*

=

New Rate Matrix

Sample Overview| Who is Involved

Service Coordinators/ Other Scheduling Staff	Myers & Stauffer	AAIDD	BDS
People throughout the state who currently work with individuals and families to schedule SIS-A assessments will continue this work.	A rate setting expert will help BDS analyze data collected during the sample.	AAIDD assessors will conduct the SIS-A assessments for sample participants.	Staff members at BDS will coordinate SIS-A assessor availability and help scheduling staff finalize their appointments.

Who will Participate:

- People who are overdue for their SIS-A assessment or soon to be overdue are likely to be a part of this sample. Everyone receiving services is required to complete a new SIS-A every five years.

- People who are new to the adult service system will not be a part of the sample.

Why those Participants:

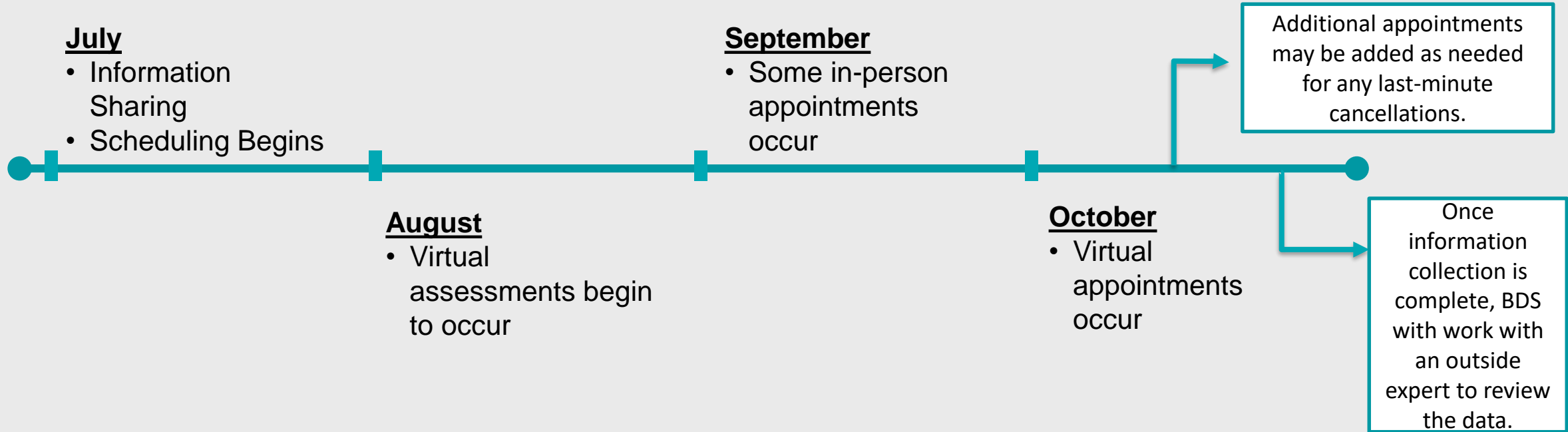The sample was chosen with two goals in mind:

1. Reduce participation burden/ Continue business as usual (Ex. BDS does not intend to ask an individual to repeat a SIS-A, if one was recently completed)

2. Ensure analytical validity. Our external partner, Myers & Stauffer, ensured that a randomly selected, representative group of individuals were selected.

The data collection process will take approximately 3 months.

July
- Information Sharing
- Scheduling Begins

August
- Virtual assessments begin to occur

September
- Some in-person appointments occur

October
- Virtual appointments occur

Additional appointments may be added as needed for any last-minute cancellations.

Once information collection is complete, BDS with work with an outside expert to review the data.

SIS-A Strengths

- Strength-based assessment
- Direct, reliable, and valid measurement of support requirements in specific areas of life activities as well as supports needed to prevent or manage different exceptional medical and/or behavioral needs
- Provides an opportunity for conversation about an individual's goals
- Results include a visual profile of the intensity of support needs

Current Use

- Currently used in New Hampshire for person-centered planning
- HE-M 503 requires that a SIS-A be completed at least once every five years

Unique Features

Team Approach

The SIS-A is designed as an interview of the individual, with participation from a team of friends and supporters.

Practical Orientation

The SIS-A interview forms rank support requirements by *frequency, daily support time,* and *type of support needed.*

Useful Information

Results include a visual profile of high and low intensity support needs, an Index score, and a percentile ranking.

Valid and Reliable

The SIS-A was extensively field tested before it was initially launched in 2004. Ongoing research around the world continues to confirm the assessment's reliability and validity. The psychometric and technical properties are provided in the User's Manual.

Uses in Addition to Support Planning

SIS-A data can also be used to examine support needs across comparable groups for a number of purposes, including program planning, projecting future population needs, analyzing resource distribution, and program evaluation.

Questions/ Comments

We just talked about why we are collecting SIS-A sample information. Do you have any questions about why we're doing this?

Scheduling Walkthrough

Scheduling Walk-Through | How is it different from the current process?

BDS understands that you currently work with CSNI to schedule appointments. Throughout the sample period, you will also work with BDS to schedule appointments.

The scheduling process for the SIS sample includes 3 main platforms:

1. SmartSheet – Online Calendar of Appointment Availability

    a) Appointment availability will be pre-populated on this user-friendly calendar for an easy way to view all open appointment choices.

2. Excel Face Sheet

    a) In attempts to minimize any documentation burden, BDS has not substantially changed the documentation requirements necessary before a SIS-A assessment. You will fill out an Excel version of the face sheet that will streamline uploads to SIS online. Questions and fields are largely identical to the original face sheet.

3. Secure File Transfer Protocol (SFTP) – Submit Completed Excel Face Sheet

    a) You will submit the completed Excel Face Sheet to BDS by uploading it on an SFTP site.

Availability Details:

- Appointments are available Mon-Sat, 8AM, 1PM, or 5:30PM

- Virtual assessments available: August and October

- In-person assessments available: last 3 weeks of September

- Please submit requests for appointments at least 2 weeks in advance.

Edit

Date
07/18/22

Time Slot
1pm

Participant Unique ID

Case Manager First & Last Name

Case Manager Email Address

Case Manager Phone #

Region #

Does the participant need translation services?

Appointment ID
9465

Booked

Add Attachment
Create Proof

Cancel   OK

1. Input in this section the Unique ID you received for each SIS recipient on the list from your area agency.

2. Keep this Appointment ID in your records for each SIS recipient you are scheduling for. This Appointment ID must be typed into the Excel Face Sheet.

3. You must check this box for your scheduling request to go through.

4. You must **save** the sheet after submitting your request. **Please double check the Participant Unique ID before saving the sheet.**

File   Automation   Forms

Calendar View   Filter
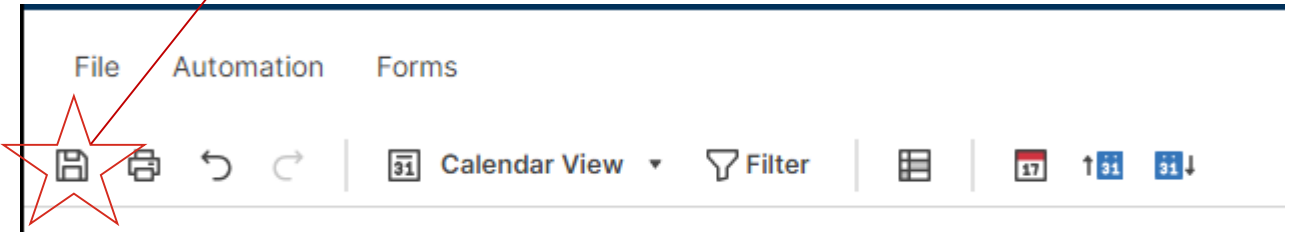
Check your inbox for a confirmation email from SmartSheet titled "SIS-A Appointment: PENDING".
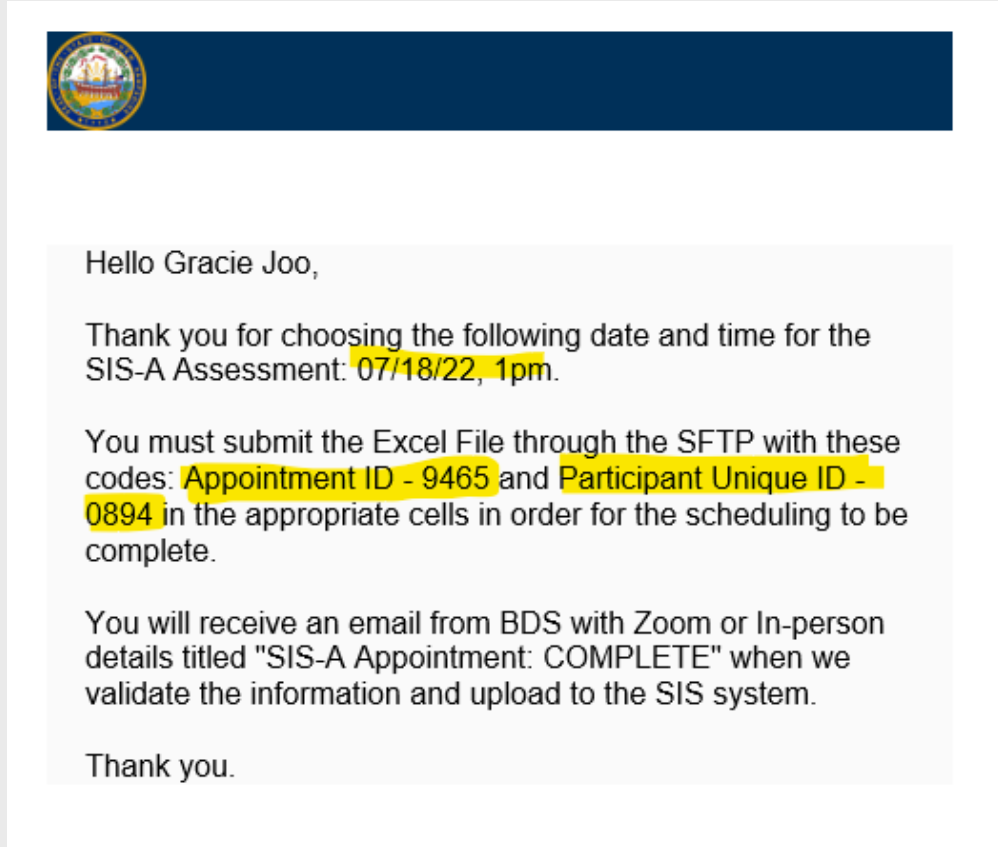
Hello Gracie Joo,

Thank you for choosing the following date and time for the SIS-A Assessment: 07/18/22, 1pm.

You must submit the Excel File through the SFTP with these codes: Appointment ID - 9465 and Participant Unique ID - 0894 in the appropriate cells in order for the scheduling to be complete.

You will receive an email from BDS with Zoom or In-person details titled "SIS-A Appointment: COMPLETE" when we validate the information and upload to the SIS system.

Thank you.

The highlighted information on the screenshot to the left is crucial information to keep at hand for filling out the Excel Face Sheet. **Be sure to keep this information in your records.**

SIS Assessment Face Sheet

Be sure to scroll all the way to the right to complete all relevant fields. Required fields will light up red if left empty. --->>>>

Individual's Information:

Participant Unique ID	
Interview Date mm/dd/yyyy	
Time of Interview	
Last Name	
First Name	
Middle Name	
Preferred Name	
Medicaid Number	
Duck ID	
D.O.B.	
Gender (M or F)	
Living Situation	
Address	
City	
State/Province (format abbrev i.e. NH)	
Zip Code	
Phone	
Ext.	
Language Spoken at Home	

Interview Planning:

Appointment ID	
Interview Location Address (Zoom or Full Physical Address):	
Primary Contact for Day of Assessment: Full Name	
Primary Contact for Day of Assessment: Relation to Individual	
Primary Contact for Day of Assessment: Phone Number	
Specific Instructions to Interviewer: (this includes accomodations, trigger words or actions, harmful behaviors to self or those around, any personality conflicts with	
Interpreter needed? (0 = No, 1 = Yes)	
Language to be translated:	

Case Manager Information:

Case Manager Name:	
Agency/Region:	
Email:	
Phone:	

Respondent Team/People at the Meeting

	Respondent First	
	Respondent Last Name	
	Relationship	
	Language	
	Agency	
	Email	
Respondent/Participant 1	Phone	
	Respondent First	
	Last Name	
	Relationship	
	Language	
	Agency	
	Email	
Respondent/Participant 2	Phone	
	Respondent First	
	Last Name	
	Relationship	
	Language	
	Agency	
	Email	
Respondent/Participant 3	Phone	
	Respondent First	
	Last Name	
	Relationship	
	Agency	
	Email	
	Language	
Respondent/Participant 4	Phone	
	Respondent First	
	Last Name	

Essential Support Individuals/Organizations Not Participating

	Full Name	
	Relationship	
Individual / Organization Providing Support (Not Participating) 1	Phone	
	Ext.	
	Full Name	
Individual / Organization Providing Support (Not Participating) 2	Relationship	
	Phone	
	Ext.	
Individual / Organization Providing Support (Not Participating) 3	Full Name	
	Relationship	
	Phone	
	Ext.	

Instructions | **Face Sheet** | +

By early next week (7/18-19), BDS will email schedulers a link to the Secure File Transfer Protocol (SFTP) site with username and password information.

The site will prompt you for log-in input. Once logged-in, you will be able to submit the completed Excel Face Sheet.

Please note: Once submitted, you will not be able to retrieve the file again or make any edits.

1. The case manager/scheduling staff, individual, and respondents listed in the Excel Face Sheet will receive email confirmation from BDS with Zoom or In-Person details for the appointment.

2. You should not consider your appointments final until you receive Zoom information.

To Reschedule an Appointment

To reschedule an appointment, notify BDS at least 72 hours before the original appointment date.

1. Visit the calendar link again, identify 3-5 potential new time slots, and send to BDS via email.

2. Email DDsystemswork@dhhs.nh.gov using an email template that will be provided to you.

   a) Thine. You can also email BDS if you need the template. This email template is included in the detailed scheduling walkthrough PPT posted online. You can also email BDS if you need the template.

3. You will receive a confirmation email in response with Zoom/In-Person information for the new appointment time and date.

Questions/ Comments

We just talked about how to work with BDS to schedule a SIS-A assessment. Do you have any questions about how to do this?

Next Steps

Immediate Next Steps

1. Create a SmartSheet Account.

   a) Check your email (including spam folder) for an email from SmartSheet

   b) Follow the email's directions to create a password and finalize log-in information

   c) Use this log-in each time you click the calendar link to make an appointment

2. BDS will distribute a list of sample participants in your region. When you receive this…

   a) Call SIS-A sample participant and family/guardian about scheduling.

   b) Collect contact information for other assessment participants. Identify a point person for assessment day.

   c) Consider gathering 3-5 time slots. Appointments are available Mon-Sat, 8AM, 1PM, or 5:30PM

   d) In-person assessments are available in September. Virtual assessments available throughout August-October.

3. Receive and try out SFTP log in information.

Resources

Primary Tools

- **To Schedule an Appointment**: https://app.smartsheetgov.com/sheets/xGGXMR2Hc9Fp2VQ7VVJh73Wwmqp84R4GhxgH33F1

- **To Download Blank Excel Face Sheet**: Check your email for an attachment. You can also navigate to this website (SIS-A™ Scheduling Staff Resources Web Page) and find a copy to download on the Resources tab.

- **To Upload Completed Excel Face Sheet**: Secure File Transfer Protocol (SFTP) site

Other Questions?

- **Scheduling Helpline**: (603)271-7474

- **To Reschedule Appointment send template email to**: DDSystemsWork@dhhs.nh.gov

- **SIS-A Fact Sheet**: Link

- **SIS-A Scheduling How-To Guide**: Link