Version 2.4 Completed 2020-06-25 Released 2020-06-26

Based on Teams meeting with Linda Prieto 6/25/2020

- Change Color of the Step 1 Do this BEFORE submitting a profile to avoid a HIPAA violation!
- Remove passage from Step 2 Go to https://dss.orangecountygov.com/occsi

Version 2.3 Completed 2020-06-10 Released 2020-06-10

Based on email from Christine Smallin dated 6/10/2020

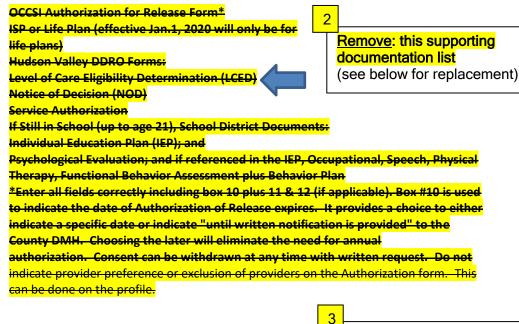
• Added Changes 1, 2 and 3. Change 4 is not possible as it is the Word file that was sent previously and not part of the system database. I linked the Word file on the Default Home Page for #4.

Welcome

Thank you for choosing the Orange County Community Support Initiative (OCCSI), a Collaborative, Systematic Approach to Optimize the Delivery of Quality Supports to Children and Adults with Developmental Disabilities Living in Orange County, New York. Participating Providers: ACCESS: Supports for Living, Crystal Run Village, Greystone Programs, Inspire, Mental Health Association of Orange County & The ARC of Sullivan-Orange Counties New York in Collaboration with the Orange County Department of Mental Health. This secure portal is only to be used by Care Managers for people living in Orange County, NY and only after submitting a completed set of supporting documentation including the Authorization for Release Form. Linkage to OCCSI involves a two-step process:

Click to view OCCSI Instructions

Step 1-Supporting Documentation---Do this BEFORE submitting a profile to avoid a HIPPA violation: Scan as PDF all of the following documents (both sides if two-sided), send to the Orange County Department of Mental Health (OCDMH) @ OCCSI@orangecountygov.com, and check the boxes below prior to submitting the profile.



Add this new checkbox form in place of deleted list

	Authorization for Release Form			
	Life Plan (dated within one year)		Coding: require user to check all	
Hudson Valley DDRO Forms			boxes before they can submit a profile (exception: last 2 boxes, if user checks NO to the final	
	Level of Care Eligibility Determination (LCED) Notice of Decision		question, "Is client still in	
	Service Authorization Notice		school").	
Is client still in School (up				
*If YES, School District Documents:				
☐ Individualized Education Plan (IEP) for current school year; and				
Psychological Evaluation, dated within 36 months; and if referenced in IEP:				
<mark>Occupa</mark> Plan	ational (OT), Speech, Physical (PT), Functional B	<mark>ehavior</mark>	(FBA), and/or Behavior	

Step 2 - Profile of Person in Need of Support

Go to https://dss.orangecountygov.com/occsi

Version 2.2 Completed 2020-06-03 Released 2020-06-04

Based on email from Christine Smallin dated 6/3/2020

• Added OCCSI Supporting Documentation Online Form MS Word form

Version 2.1 Completed 2020-01-15 Released 2020-01-16

Based on email from Lacey Trimble dated 1/14/2020

 Added Release Signature Date Report to list all status with a Release Signature Date between prompted dates

Version 2.0 Completed 2019-09-22 Released 2019-09-23

Based on email from Delores McFadden dated 9/22/2019

- Updated the default page with new OCCSI Instructions
- Updated the default page with "The ARC or Orange" to "The ARC Sullivan-Orange Counties New York"

Version 1.9 Completed 2019-08-07 Released 2019-08-08

Based on email from Delores McFadden dated 7/3/2019

• Created Report Would you be able to create a report on kiddos up to age 17 with autism spectrum dx, problem behavior=yes and list the problem behaviors checked?

Version 1.8 Completed 2019-08-06 Released 2019-08-07

Based on email from Delores McFadden dated 8/6/2019

Please replace this wording on the occsi homepage with wording below: Thanks much!

Scan as PDF all of the following six documents (both sides if two-sided) and send to the Orange County Department of Mental Health (OCDMH) @ OCCSI@orangecountygov.com prior to submitting the profile.

- OCCSI Authorization for Release Form
- DDRO Service Authorization
- Full ISP with All Attachments (If no provider preference, indicate "Provider TBD")

- Level of Care
- Notice of Decision
- Educational Assessments and Plans (IEP, PSYCH, OT, PT, SLP, ABA) for those enrolled in school

Replacement wording:

Scan as PDF all of the following documents (both sides if two-sided) and send to the Orange County Department of Mental Health (OCDMH) @ OCCSI@orangecountygov.com prior to submitting the profile

OCCSI Authorization for Release Form*

ISP or Life Plan (effective Jan. 1, 2020 will only be Life plans)

Hudson Valley DDRO Forms:

- Level of Care Eligibility Determination (LCED)
- Notice of Decision (NOD)
- Service Authorization

If Still in School (up to age 21), School District Documents:

- Individual Educational Plan (IEP); and
- Psychological Evaluation; and if referenced in the IEP, Occupational, Speech, Physical Therapy,
 Functional Behavior Assessment plus Behavior Plan

* Enter all fields correctly including box 10 plus 11 & 12 (if applicable). Box #10 is used to indicate the date of Authorization of Release expires. It provides a choice to either indicate a specific date or indicate "until written notification is provided" to the County DMH. Choosing the later will eliminate the need for annual authorization. Consent can be withdrawn at any time with written request. Do not indicate provider preference or exclusion of providers on the Authorization form. This can be done on the profile.

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Version 1.7 Completed 2019-03-18 Released 2019-03-19

Based on email from Delores McFadden dated 2/22/2019

- Add "Report by TimeStampCreated" Report of all records with TimeStampEntered field between prompted dates with count
- Add "ReportZipCode" Count of all records by Zip Code between TimeStampEntered prompted date with Pie Chart
- Add new reports to the Report Menu page
- Respond to email request list...
 - Agency that serves the person-fully or partially
 - I believe I took care of this with the last version (v1.6), please let me know if it did not meet your needs.

- Totals for timestamp entered with parameters example: calendar year, first quarter, etc. *
 - Added Report By TimeStampEntered where you can select the date parameters and it will count and list the records that fall within the time frame selected.
- o zip code report with total number per zip
 - You know have Active Records by Zip code Report and Counts by Zip Code. Counts by Zip Code will count all of the records that were entered during a specified timeframe and provide a pie chart.
- o dashboard-add totals for the agency chart, change the name to "referring agency"
 - I have added the Agency Total and the Status Total to the Dashboard report.
- active records report-add total #
 - Added Record Count to the Active Records Report.
- o age range 5-11, 12-17, 18-25, 26-49, 50-69, 70+ with totals
 - Added Active Records by DOB Report where you can enter the birth dates and it includes a count.
- o add "score" -- will be a 2 digit number, never more than that.
 - Not sure how I would determine the score. Need more information.

Version 1.6 Completed 2019-02-19 Released 2019-02-20

 Add "Report by Status" Report sortable by all fields but specifically EligibilityExpirationDate and ReleaseSignatureDate fields

Version 1.5 Completed 2018-09-08 Released 2018-09-10

- Work on items from email dated 9/6/2018 from Delores McFadden with responses in red below.
- Add Release Signature Date field to the SQL Database, the Item, Insert and Edit pages of all of the Data Entry Forms.
- DOB (entered as #/#/####) is not clear to me. Does this mean 1/3/2018 and 1/30/2018 or --/--/--- 01/03/2018 ? This means 1/3/2018, 1/30/2018 would be a different date. Do not use 01/03/2018. I added some validation into these date fields.
- 2. Phone number entry format???? (845)-291-2620??? Or 8452912620 I believe either would work as there is no restriction for this field.
- 3. If Yes, Eligibility Expiration Date: (entered as #/#/###) same as DOB above? Yes, Same as #1 above.
- 4. Section XIV: The only agencies that should be in the drop box now are:
- Care Design NY CCO
- Tri- County Care CCO
- LIFEPlan CCO (yes, capital LIFEP)
- Advanced Care Alliance CCO
 - Were all of the records changed so we can delete the existing agency names? We cannot have records with an old agency name in the system and not have them in the drop down. This will cause the system to error.
- 5. Typo- Care a Supervisor's Email: should be Care Manager Supervisor. This has been fixed.

- 6. Rebecca and I will need to update the MSC, now care manager affilitated with a CCO for everyone currently in the portal but we will need to get that info from the CCOs. Okay, Let me know when complete so I can delete the other agencies in the list.
- 7. Can you add to the profile somewhere in Section I "Care Management Tier" and the tiers are 1,2,3, or 4. This would be added to the scoring calculation we discussed the other day. We didn't talk about where the score would go but it would be great to add on the profile under "Internal Use Only" I will try to address the scoring calculation in a future release.
- 8. Can you add to the profile under Internal Use Only-Status "match in process" Has been added to the Drop Down Lists in the latest version.
- 9. One additional request. We did not discuss another need. I have to make sure the profile and supporting documents are complete. Right now, i am going through new portal submissions to check for completeness/accuracy. Then, I check to see if we have a folder for the person on our protected public directory for OCCSI. If no folder, then we did not receive any documents. If there is a folder, I open the documents to make sure we have everything required. I am using a word document to track this info. (see below) I give this to the OCCSI providers monthly so they know who on the portal is actually good to go and who not to look at. I've attached that document. I was going to have our staff set up an excell spreadsheet for this but I thought i would ask if a report can be generated from the database that I could add to OR would it make sense to add these fields under Internal Use Only and somehow show the people that are complete and accurate submissions by color or some other way? You are probably wondering what in the world does this mean?????? I will try to address the scoring calculation in a future release.

Version 1.4 Completed 2018-08-30 Released 2018-08-31

- Increased the size of the field MayEngageInTheseProblemBehaviors to nvarchar(MAX) in the SQL Database
- Update Verbiage on the default page from email dated 7/31/2018 From Delores McFadden
- Change the Titles of Section XIV-Medicaid Service Coordinator to Care Manager
- Added the following to the DDL-Agencies table
 - o Care Design NY
 - o LIFEPlan
 - Tri-County Care
 - Advanced Care Alliance

Version 1.3 Completed 2018-04-17 Released 2018-04-18

- Increased the size of the field SensitiveInformation to nvarchar(MAX) in the SQL Database to avoid truncated string errors
- Added OCCSI Instructions PDF file
- Added Link to the OCCSI Instruction file ~/files/OCCSI_Instructions.pdf to the Default and About pages

Version 1.2 Completed 2018-02-11 Released 2018-02-13

• Changes to the Data Entry Pages for All Access and Login Data Entry pages

- Section XVI Preferences, Special Requests and Other Factors That Could Impact the Staff Matching Process
 - Open to working with any of the six participating providers; There is no preference:
- Section XI Current Services Authorized and Receiving
 For "currently provided" indicate 0 if receiving no services and if partially served, indicate the number of units receiving.
- Changes to the narrative on the Default Page
 - Replace with the following:

Welcome!

Thank you for choosing the **Orange County Community Support Initiative (OCCSI)**, a Collaborative, Systematic Approach to Optimize the Delivery of Quality Supports to Children and Adults with Developmental Disabilities Living in Orange County, New York. Participating Providers: ACCESS: Supports for Living, Crystal Run Village, Greystone Programs, Inspire, Mental Health Association of Orange County & The Arc of Orange in Collaboration with the Orange County Department of Mental Health. This secure portal is only to be used by Medicaid Service Coordinators for people living in Orange County, NY and only after submitting a complete set of supporting documentation including the Authorization for Release Form. Linkage to OCCSI involves a two-step process:

Step 1-Supporting Documentation---Do this BEFORE submitting a profile!

Scan as PDF all of the following six documents (both sides if two-sided) and send to the Orange County Department of Mental Health (OCDMH) @ OCCSI@orangecountygov.com prior to submitting the profile.

- OCCSI Authorization for Release Form
- DDRO Service Authorization
- Full ISP with All Attachments (If no provider preference, indicate "Provider TBD")
- Level of Care
- Notice of Decision
- Educational Assessments and Plans (IEP, PSYCH, OT, PT, SLP, ABA) for those enrolled in school

Step 2-Profile of Person in Need of Support

Go to https://dss.orangecountygov.com/occsi

It is important that you have all information required to complete the profile. Once started, you will not be able to stop, save or return for completion at a later date.

If you are an MSC working for a participating OCCSI provider, your supervisor will have the ability to edit your submission. If you do not work for a participating provider, you may request an edit from the OCDMH. **The profile will not be viewed by providers if incomplete.**

When done, you will click "insert" BUT before you do, print the profile for your records.

To Print- Click File Print on your web browser, use Control-P or right click the page to print out the form

Detailed MSC instructions and more can be found at www.orangecountynyddconnection.com
By submitting this form you are attesting that you have reviewed with the individual/family/caregiver the options for connecting with community supports and they have chosen to participate in the OCCSI. A signed Authorization for Release of Health Information form and other required supporting documentation has been filed with the Department of Mental Health

THIS SYSTEM IS FOR AUTHORIZED USE ONLY!

- Add Agency Field to the Last Name Search page
- Zip Code Drop Down Lists in numerical order on each of the Insert and Edit pages
- Create the following reports and add them to the Reports Menu Page
 - Active Records Report
 - Includes Service Types
 - Includes Preferences
 - Includes Exclusions
 - Active Records by Zip Code Report

Version 1.0 Completed 2017-12-29 Released 2018-01-02

Version 0.14 Completed 2017-12-21 Released 2017-12-21:

Setup WebBase on the SSL (Secure Sockets Layer) protocol to the DSSWEBS01 Server for FQDN
(Fully Qualified Domain Name) https://dss.orangecountygov.com/occsi For full testing before use in production.

Version 0.13 Completed 2017-12-20 Released 2017-12-20:

- Create the open access Insert page for providers to enter data without needing to login. All Data is entered with a Status of "NEW" and Last Saved By of Anonymous@OCCSI so they can be identified as New.
- Work with County IT to open SSL (Secure Sockets Layer) protocol to the DSSWEBS01 Server for FQDN (Fully Qualified Domain Name) https://dss.orangecountygov.com/occsi in preparation for the Implementation of Version 1.0.
- Create the requested UserIDs and Passwords for the OCCSI WebBase.

Version 0.12 Completed 2017-12-18 Released 2017-12-18:

(Edits from emails on 12/18/2017 from Delores McFadden)

- Reword Section XVII-Attestation on the Item, Insert and Edit Pages to:
 - By submitting this form you are attesting that you have reviewed with the
 individual/family/caregiver the options for connecting with community supports and
 they have chosen to participate in the OCCSI. A signed Authorization for Release of
 Health Information form and other required supporting documentation has been filed
 with the Department of Mental Health.

Version 0.11 Completed 2017-12-17 Released 2017-12-17:

(Edits from emails on 12/15/2017 from Delores McFadden and Jill Rothschild)

- Add print statement in red at the bottom of the Item, Insert and Edit pages
- Move Section XVII Attestation to above "INTERNAL USE" section
- Section VII Please bold the following times: Intellectual Disability (IQ below 69) / IQ of 50+ / IQ of 50-Complete
- Section X Which would be easier? A) adding comments boxes next to each selection or B) adding an * next to a the following selections; Allergies/Diabetes/Problems with toileting elimination/requires specialized feeding/seizure disorder AND then add a comment box that identifies where an * please specify Adding data boxes will require updates to the Database, Form, Reports and Search pages. Ok, I think we can live with it and includes something in the instructions
- Section X can we move the Seizure Disorder/Epilepsy above the Prominent physical/health/medical conditions? Complete
- Section XI Please change title to: Current Services Receiving Complete
- Section XI please add a 2nd Current CH provider option and drop down- The data will be spread
 across multiple fields. For example, It would be difficult to generate a report of data that belong

- to Inspire. I do not have any issue creating it if you feel it is needed but again I feel it would create difficulties when reporting on the data later. Please let me know your thoughts. Same
- Section XI Please add an option for PCA Services in between the OMH and the Self Direction
 option. Please also add a comment box next to it. To add fields requires a database update and
 then re-wire the Item, Insert and Edit pages, reports, searches, etc... Not an issue if it is of value
 but please confirm Same
- Section XII in the drop down box of School District please move the two NONE options to the drop down box under the Placement out of district drop down. Complete
- Section XII Please add Wallkill School District to the drop down options for School District.
 Complete
- Section XVI Please put in bold the Open to working with any of the six participating providers/Provider preference/provider exclusion Complete
- Section XVI Please input a drop down selection for Provider Exclusion. It should be the same
 drop down list as the one above it for Provider Preference. Last meeting it was decided to make
 this a Yes/No drop down and added the field to list the exclusions. That's correct.

Version 0.10 Completed 2017-12-11 Released 2017-12-12:

(Edits from emails on 12/11/2017 from Delores McFadden)

- Section XVI Correct the spelling on the title on the Insert, Item and Edit pages
- Section XVII Update the Section number from XVIII to XVII since XVII is now INTERNAL USE
 ONLY and Edit the wording of the Attestation on the Insert, Item and Edit pages
- Reword the Default Page wording listing the required documentation etc...

Version 0.9 Completed 2017-12-06 Released 2017-12-06: (Edits from meeting on 12/6/2017 at OC MH)

- Add "CurrentServicesNotes" field to the SQL database
- Add new SQL Database Table "DDL-ParticipatingProviders
 - Imported the data from the Providers table and deleted the following providers
 - Abilities First
 - Anderson Center
 - Center for Discovery
 - IKAN
 - Other
 - Taconic Innovations
- Section XI Current Services
 - o Add "per week" after each Unit field on the Insert, Item and Edit pages
 - Add "*If partially served, complete the following" under the Title of the section on the Insert, Item and Edit pages
 - o Add Field "Current Services Notes" on the Insert, Item and Edit pages
- Section XVI Preferences Special Requests and Other Factors that could Impact the Staff Matching process
 - Change Provider Exclusion field from a Drop Down List containing the list of providers to a No/Yes on the Insert, Item and Edit pages
 - Add "If yes, Please list Below" next to the Provider Exclusion No/Yes Drop Down List on the Insert, Item and Edit pages
- Section XVII Service Disposition Renamed to INTERNAL USE ONLY on the Insert, Item and Edit
 pages
 - Move "Status" into this section from the top of the form on the Insert, Item and Edit pages
 - Support Suggested on the Insert, Item and Edit pages
 - Comments on the Insert, Item and Edit pages

Version 0.8 Completed 2017-12-05 Released 2017-12-05:

(Edits from email on 12/1/2017 from Delores McFadden)

Section IV - Ambulation

please remove "non-ambulatory" -they've already indicated this above ("ambulatory" yes/no)

• Section VI - Primary Language if Not English

Please remove:

Language NA:

• Section X - Prominent Physical/Health/Medical Conditions, Concerns, Alerts

Please remove:

Prominent Physical/Health/Medical Condition Concerns Alerts?:

Add on option for "none"

Prominent Physical/Health/Medical Conditions, Concerns, Alerts-Other, Please Specify: OR just "Other, Please Specify"

- Section XI Current Services
 - o For CH, CH- CIHS, CH-R and respite, we have approved units and provided units. We will want to run reports of "available units". If the report can calculate the math (approved minus provided=available) then we are fine, otherwise we may need to add "available units".
 - In-Home Behavior Consultation (IBS): remove "(IBS)"
- Section XII If Registered as a Student with a School District. Please complete this section.
 - o Provisional Eligibility: revise to say "Provisional OPWDD Eligibility"
- Section XIII Family Contact
 - o Family Contact 2 Cel: should be Cell for family contact 1 and 2
- Section XIV Medicaid Service Coordinator

Please add a field for MSC supervisor name

- Section XVI Preferences, Specifications Requested by Individual and/or Family and Environmental Factors - Please change to: Preferences, Special Requests and Other Factors That Could Impact the Staff Matching Process
- Please replace geography with "service location"
- Peer Model---Please change to "Peer Role Model"
- Open to all providers:
 - Please re-word to "open to working with any of the six participating providers; there is no preference"

Version 0.7 Completed 2017-11-28 Released 2017-11-28: (Edits from our meeting on 11/22/2017 at Mental Health)

- Add label "Note: 1 Unit=15 Minutes" to the Insert, Item and Edit pages after each line containing a Units field
- Change "Authorized" to "Receiving None" in all of the drop down lists on the Insert, Item and Edit pages
- Delete "Pending" in all of the Drop Down lists on the Insert, Item and Edit pages
- Delete the field "MedicalServicesCoordinatorCel"
 - o Deleted from the SQL Database Table "Data"
 - Deleted the field from the Insert, Item and Edit pages
 - Deleted the field from all of the Search and Report pages
- Delete the field "NonSmoker"
 - o Deleted from the SQL Database Table "Data"
 - Deleted the field from the Insert, Item and Edit pages
 - O Deleted the field from all of the Search and Report pages
- Create the Field "MedicalServicesCoordinatorSupervisorEmail"
 - o Create the field in the SQL Database Table "Data"

- o Create the field on the Insert, Item and Edit pages
- Create the field on the Search and Report pages
- Create the Field "NonSmokingStaff"
 - o Create the field in the SQL Database Table "Data"
 - o Create the field on the Insert, Item and Edit pages
 - Create the field on the Search and Report pages
- Move the following fields to the bottom of Section XVI
 - o Open to All Providers
 - o Provider Preference
 - Provider Exclusion
- Add "CH Enhanced-WCS" to the Support Suggested field in Section XVII on the Insert and Edit pages

Version 0.6 Completed 2017-11-11 Released 2017-11-12:

(Edits from our meeting on 11/08/2017 at Mental Health)

- Bold Medication Taken... fields
- Remove Fields from the SQL Database and the Insert, Item and Edit pages
 - o Intellectual Disability Mild
 - o Intellectual Disability Moderate
 - Intellectual Disability Profound
 - o Intellectual Disability Severe
- Add "CH-R" and "CH-R Enhanced" to the Support Suggested Drop Down lists on the Insert and Edit pages
- Too many other changes to list see Hard Copy folder with highlighted forms for all of the changes made to the Insert, Item and Edit pages

Version 0.5 Completed 2017-10-26 Released 2017-10-27:

(Edits from our meeting on 10/25/2017 at Mental Health)

- Currently Served by and Agency fields should not have School Districts-Remove all school districts from the drop down lists
- Provider Exclusion and Provider Preference Drop Down Lists Default selection to "NA"
- Change Agency Search to Provider Search
- Remove the field labeled "None of the Above"
- Change Outstanding Units to Unserved Units
- Change Used Units to Provided Units
- Under XI
 - Change label to Currently Being Served Community Hab By
 - Change label to Currently Being Served Respite By
 - Move Respite to top under CH
 - Move Units of each program under each respectively

Version 0.4 Completed 2017-10-26 Released 2017-10-27:

(Edits from our meeting on 10/25/2017 at Mental Health)

- Currently Served by and Agency fields should not have School Districts-Remove all school districts from the drop down lists
- Default drop down fields to "NA" for the ProviderExclusion and the ProviderPreference fields
- Add a Provider search
- Delete the "None of the Above" field
- Change "Outstanding Units" to "UnServed Units" labels
- Change "Used Units" to "Provided Units" labels
- Remove "None" on the question "Comment
- Add the following fields to the SQL Database Table, Insert, Edit and Item Pages

- CurrentlyBeingServedCHBy
- CurrentlyBeingServedRespiteBy
- Move all of the "Unit" fields up to the top of Section XI under each category
- Reorganize the SQL Table Fields.

Version 0.3 Completed 2017-10-16 Released 2017-10-17:

(Edits from our meeting on 10/11/2017 at Mental Health)

- Verbiage for submitting the form above the submit button
- Create Currently Served by drop down field
- Create Provider Exclude field
- Create Changes Made By field near TimeStamp
- Re-write Status field Drop Down selections
 - Archive
 - Fully Served
 - Inactive
 - Partially Served
 - Partially Served by Choice
 - Unserved
 - Unserved by Choice
- All Data must be entered for the form to be saved (This cannot be done since some Sections and Fields are only filled in when it is applicable)
- Create Search by Status & Agency
- Create a report to pull all data
- Change all Checkboxes to Drop Down lists
- Create Edit Page and Functionality
- Add text labels for each field on the Insert, edit and view pages

Version 0.2 Completed 2017-10-03 Released 2014-10-04:

• Demo of the System

Version 0.1 Completed 2017-09-28 Released 2017-09-29:

• Demo of the system