

## **VO-NM Transition Plan** **Updated 4/13/05**

Note: The following plan is focused primarily on the specific tasks that must be accomplished in the critical pre-July 1, 2005 implementation period, as well as the initial three to six months of the first contract year. This Preliminary Transition Plan will be continuously reviewed and revised during Phase One to ensure that subsequent developmental tasks are identified, assigned, and accomplished.

The following teams have been established by the Collaborative and are referenced in the document below:

- SE Administration (SE Admin); Contact: Felix Alderete 827-2519
  - SE Finance (SE Fin)
  - SE Information Technology (SE IT)
- SE Contract Oversight (CO); Contact Alana Reeves 505 660-2517

The following VO employees serve as the Implementation Project Leads:

- Pamela Galbraith, CEO 505-220-6939
- Judy Enright, COO – 505-264-2067
- Lisa Aumack – 928-607-3581
- Ted Jones – 617-645-1677

Please see attached implementation organizational chart for the team and work group structure and lead staff for the transition.

	Start Date	End Date	VO Implem. Team	Lead	Collab Rep	Status
<b>Implement Transition Structure / Develop Detailed Work Plans</b>						
<p>1. <b>Determine and appoint Transition Work Groups</b> composed of Collaborative/BHPC and VO-NM staff, with participation by providers, customers, and families in appropriate tasks. We suggest, at a minimum:</p> <ul style="list-style-type: none"> <li>• Communications/community relations; (CO)</li> <li>• Eligibility, enrollment, and benefits; (CO)</li> <li>• Provider network; (CO/SE Admin)</li> <li>• Clinical operations; (CO)</li> <li>• Information Technology; (SE IT)</li> <li>• Claims/service reporting; (all?)</li> <li>• Quality Management; (CO)</li> <li>• Finance; and (SE Fin)</li> <li>• Administrative support.</li> </ul> <p>All Transition Work Groups shall meet at least weekly and be convened no later than 4/27/05</p>	3/1/05	4/1/05 4/27/05	Exec Leadership Team	Enright	SE Admin CO	<ul style="list-style-type: none"> <li>• <b>VO-NM teams formed 3/10/05</b></li> <li>• Weekly meetings initiated with Collaborative Administrative Services Committee (including Finance and IT)</li> <li>• Weekly meetings with Contract Oversight group initiated 4/18/05;</li> <li>• VO is meeting with Cross-agency Teams for Readiness Review; will attend Readiness Review Training 4/28;</li> <li>• VO has met with NMCD, HSD, CYFD, and DOH;</li> <li>• Meetings scheduled with ALTSD for 4/20;</li> <li>• Attended initial meetings with each MCO and RCC 4/21 and are scheduling follow-up meetings within functional areas (clinical, finance, executive, pharmacy, customer service to include complaints/grievance/appeals and transportation; IT); Clinical Groups to focus on ID of high-risk customers and care coordination.</li> <li>• Met with key MAD staff 4/22; identified contacts, communication process, and other implementation issues;</li> <li>• Attended Local Collaborative Meeting 4/15;</li> <li>• VO is attending all Regional Meetings;</li> <li>• Attended CYFD meeting and CYFD Children's Subcommittee 4/19;</li> <li>• Attended SWBH Conference 4/19;</li> <li>• Attended Collaborative Meeting with Tribal Leaders 4/20;</li> </ul>

	Start Date	End Date	VO Implem. Team	Lead	Collab Rep	Status
						<ul style="list-style-type: none"> <li>Will meet with Community Corrections Advisory Panel 4/27;</li> <li>Will attend statewide Telehealth Conference 5/5;</li> <li>Weekly meetings: Collaborative BH Manager and VO Development Director, VONM CEO, and VONM COO</li> </ul>
2. Using Work Groups <b>develop detailed Work Plans (MS Project)</b> with assigned tasks and timelines; integrate into single VO-NM Transition Plan.	3/15/05	4/27/05	Admin Team	Jones	SE Admin CO	<ul style="list-style-type: none"> <li>Detailed work plans will be shared with the Collaborative at any time upon request.</li> </ul>
3. Implement <b>weekly internal implementation meetings</b> to monitor completion of Work Plan tasks and monthly meetings to update providers, customers/families, and other stakeholders.	3/15/05	6/30/05	Exec Leadership Team	Enright	N/A	<ul style="list-style-type: none"> <li>Internal meetings of VO and VO-NM staff have been ongoing since 2/23/05</li> <li>Major internal implementation meetings scheduled 4/28, 4/29, and 5/3 to review and ensure coordination of all aspects of VO Transition Plan in readiness for 7/1 go-live.</li> </ul>
4. Integrate Readiness Review items into Implementation Plan and create one combined document	4/28/05	5/02/05	Exec Leadership Team	Enright	CO	In process
5. Establish <b>transition communication and problem-resolution processes</b> between Collaborative and VO-NM: <ul style="list-style-type: none"> <li>Appoint VO-NM and Collaborative “leads” for rapid problem resolution; and</li> <li>Design formal meeting structure for VO-NM and Collaborative “leads” and informal communication channels for implementation and early transition periods (VO-NM and Collaborative).</li> </ul>	3/15	Ongoing	Exec Leadership Team	Enright		Joint communication plan approved, including identification of key contacts. Collaborative additionally appointed single points of contact at each agency for rapid resolution of VO information needs.

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<b>Develop and Implement Transition Communications Plan with Collaborative Review and Approval</b>						
1. Use joint Transition Communications Workgroup to <b>develop a written Transition Communications Plan</b> , to include at least the following components.	4/1/05	4/18/05 with ongoing updating	Admin	Galbraith	CO	<ul style="list-style-type: none"> <li>Joint Communications Plan adopted 4/18/05</li> </ul>
2. <b>Development of written information to be shared with all stakeholders</b> , including newsletters and other information and FAQ sheets targeted to specific populations and stakeholders.	4/1/05	Initial info distributed 5/15/05	PE&O	Grublak/Enright	CO	<ul style="list-style-type: none"> <li>Initial set of information to be ready 5/15;</li> <li>VO produced proposal summary for use by state and VO in communicating with stakeholders;</li> <li>VO submitted draft Table of Contents for Customer Handbook and Provider Manual for Collaborative review 4/20/05;</li> <li>Draft letters to providers submitted 4/20/05;</li> <li>Letter to customers to be completed for Collaborative review by 4/27/05</li> </ul>
3. <b>Stakeholder/Community Education Process</b> , including forums planned and implemented conjointly with in each region, as described in response to <i>Question B2</i> .  Construct calendar of all stakeholder forums. Conduct forums per plan.	04/08/05	Second round 5-18-05 Through 5-31-05	PE&O	Grublak/Enright	CO	<b>VO Calendar of forums/meetings includes:</b> <ul style="list-style-type: none"> <li>VO attended initial round of community forums in Farmington, Las Cruces, Native American, and Santa Fe;</li> <li>VO is scheduled to attend regional meetings on Comprehensive Statewide BH Plan;</li> <li>Currently compiling a schedule of customer forums for May and June.</li> </ul>
4. <b>Initial Provider Communication Process</b> , including targeted training in all operational aspects of the new system: <ul style="list-style-type: none"> <li>Develop provider education and orientation materials;</li> <li>Conduct Provider Forums in each region; 6-01 through 6-15; and</li> <li>Identify and respond to individual provider</li> </ul>	5/1/05 or upon Collab approval	Ongoing	Provider Network	Johnson		<ul style="list-style-type: none"> <li>Providers included in initial round of community forums held 4/8 through 5/ 5</li> <li>Second round scheduled to begin June 2005 and focus on orientation to working with VO-NM – see attached schedule</li> <li>Initial letter to providers submitted to Collaborative for approval 4/20; to be mailed within 48 hours of approval and receipt of</li> </ul>

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needs for technical assistance, including on-site training in core functions if needed. 6-01 and ongoing						<p>provider mailing list from agencies. – see attached draft letter(s)</p> <ul style="list-style-type: none"> <li>• VO has slightly revised the initial individual BH provider registration form and will ask the Wednesday meeting of the Admin. Services Committee to okay changes</li> <li>• VO has developed a draft Agency Letter and a draft Facility Letter for the Admin. Services Committee to approve</li> <li>• VO is scheduling provider trainings in all regions to assist providers with provider registration process. Four out of the seven meetings have confirmed dates, locations, and meeting places. – See attached provider training schedule.</li> </ul>
<p>5. <b>Customer/Family Education and Notification Process</b>, including all activities identified in response to <i>Question B2</i>:</p> <ul style="list-style-type: none"> <li>• Invitation to customers and families to attend community forums;</li> <li>• Individual letters to all customers: <ul style="list-style-type: none"> <li>• Distribution of letters to customers at provider treatment sessions;</li> <li>• Provider outreach to customers without mailing addresses; and</li> </ul> </li> <li>• Targeted information sessions for family and advocacy groups.</li> </ul>	5/1/05	Ongoing	Recov & Resil	Knight		<ul style="list-style-type: none"> <li>• Need to discuss with Leslie re: appropriate roles of VO, RCCs, and Collaborative in notifying customers of impending changes.</li> <li>• Draft welcome letter to customers to be presented to Collaborative 4/27; distribution through providers after HIPAA and CFR42 privacy issues have been addressed.</li> </ul>
<b>Implement Systems To Ensure Continuity of Care</b>						
<p>1. <b>Eligibility, Enrollment, and Benefits Design</b>:</p> <ul style="list-style-type: none"> <li>• Confirm service definitions, eligibility, and benefits for customers to be served within each funding stream;</li> </ul>	3/15/05	7/30/05 4/30/05	Admin Services	Jones		<ul style="list-style-type: none"> <li>• VO met with Collaborative Service Matrix committee; will follow up to identify issues by 5/1/05.</li> </ul>

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<ul style="list-style-type: none"> <li>Confirm pharmacy benefits (formulary)</li> <li>Define uniform enhanced-benefit structure for all Medicaid managed care customers;</li> <li>Develop training materials to ensure that all parties share a common understanding of eligibility and benefits in the new SE system;</li> <li>Train VO-NM implementation team and staff in the New Mexico eligibility and benefit structure; and</li> <li>Include eligibility and benefits information in all community forums, customer/family education, and provider training activities.</li> </ul>	4/1/05	<p>4/18/05</p> <p>4/30/05</p> <p>5/15/05</p> <p>Ongoing</p> <p>5/15/05</p>	Clinical	Carson		<ul style="list-style-type: none"> <li>Completed 4/18 – VO has adopted NMRX LPDX</li> <li>Contracts with Pharma companies and pharmacies initiated</li> <li>VO has met with NMCD, HSD, CYFD, and will meet with DOH 4/15;</li> <li>Meetings scheduled with ALTSD for 4/20;</li> <li>VO Benefit Team was on-site week of 4/18 – met with CYFD, Collaborative, MCOs and RCCs.;</li> <li>4/30 date is needed for 7/1 go-live;</li> <li>received finalized version of service codes from Collaborative reps,-Benefit design team to have draft service class grid by Wednesday 4/27</li> </ul>
<p><b>2. Provider Network and Service Availability:</b></p> <ul style="list-style-type: none"> <li>Confirm providers and rates currently used by each Collaborative agency and funding stream;</li> <li>With Collaborative, map old rates to new rate structure for all departments and funding streams</li> <li>Obtain letters of intent from each provider planning to contract with VO-NM;</li> <li>Confirm service array available through each provider;</li> <li>Identify how to fill gaps left if one or more current providers opt-out of the post-July 1, 2005 SE system;</li> <li>Register all providers and enter provider data in VO-NM data systems to enable service authorization and billing on July 1, 2005;</li> </ul>	3/15/05	<p>6/30/05</p> <p>4/30/05</p> <p>4/30/05</p> <p>5/15/05</p> <p>5/30/05</p> <p>6/7/05</p> <p>6/1/30</p>	Provider Network	Johnson		<p>VO has had meetings with individual agencies and other means of communications with the agencies. We continue to need information in several areas in order to develop necessary IT systems for contracting, customer registration, service authorization, and claims adjudication</p> <p>Work in progress to develop provider contract boilerplates and agency-specific exhibits; some delays due to inability to obtain all provider contracts and state agency information.</p> <p>VO will negotiate contracts with SCI providers.</p>

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<ul style="list-style-type: none"> <li>Develop a provider network “map” to help train VO-NM staff and stakeholders to understand the specific services and populations that can be served at each network provider;</li> <li>Identify current provider funding levels by fund source and develop a Phase One contracting plan;</li> <li>Execute contracts with all network providers; and</li> <li>Execute Single Case Agreements with out-of-network providers currently serving VO-NM customers.</li> </ul>						
<p><b>3. Customer Registration and Service Authorization:</b></p> <ul style="list-style-type: none"> <li>Identify data available for each customer and the appropriate mechanism for transferring or entering data into the VO-NM data system;</li> <li>Design and test IVR and other Web- or paper-based processes for enrolling new customers after July 1, 2005; provide on-site in vivo training for providers prior to 7/1/05;</li> <li>Transfer or enter all customer data into VO-NM data system;</li> <li>Identify pre-July 1, 2005 service authorizations that will need to be continued after that date; enter authorizations into VO-NM data system to ensure continuity of care and claims payment; and</li> <li>Create letters of authorization for all post July 1, 2005 services requiring authorization; distribute to providers.</li> </ul>	3/15/05	6/30/05 5/15/05 6/1/05 6/30/05 6/15/05 6/30/05	IT	Montgomery		Same comment as above item.

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<b>Implement Critical Clinical Operations</b>						
<b>1. Customer Service:</b> <ul style="list-style-type: none"> <li>Develop customer service policies and procedures;</li> <li>Obtain toll-free number; design and test Automatic Call Distribution system;</li> <li>Hire and train Customer Service Representatives in call management and problem resolution protocols, interface with Grievance/Appeals, and documentation/data entry procedures; and</li> <li>Implement test calls to assess Customer Service skills, identify additional training needs, and identify needed changes in problem resolution protocols.</li> </ul>	3/15/05	6/30/05 5/30/05 5/30/05 5/30/05	Admin Services	Jones		Customer Service Policies/ Procedures to be completed _____. Toll-free numbers obtained 4/25/05. ABQ phone installation to be completed _____. ACD to be tested _____. Customer Service training to be conducted per master Training Calendar. Customer Service test calls to be completed by 6/15/05.
<b>2. Access Line and Care Management:</b> <ul style="list-style-type: none"> <li>Develop and test IVR scripts;</li> <li>Write Care Management policies, procedures, and work flows;</li> <li>Develop and test all automated processes necessary for Care Management functions, including service authorization, continued stay review, discharge planning, creation of a clinical record, and specialized care coordination for ISHCN;</li> </ul>	3/15/05	6/30/05 6/1/05 5/1/05 6/15/05	Clinical	Harris- Smith		<ul style="list-style-type: none"> <li>In progress</li> <li>1<sup>st</sup> draft based on VO templates completed for review by Clinical Implementation Team before submission for Collaborative/VO customization.</li> <li>In progress – with IT</li> <li>Review and Telephone Screening in Progress. Face – Face Interviews scheduled for 5/10-5/11.</li> </ul>



	Start Date	End Date	VO Implem. Team	Lead	Collab Rep	Status
<ul style="list-style-type: none"> <li>Hire and train Care Managers;</li> <li>Identify customers currently receiving or needing care coordination; assign to a VO-NM Care Manager; obtain clinical information from current providers; implement appropriate discharge-planning to ensure continuity of care; and</li> <li>Identify needed Single Case Agreements for out-of-network providers.</li> </ul>		6/15/05  6/15/05  6/15/05				<ul style="list-style-type: none"> <li>Attempting through Executive Implementation to get access to Providers to develop transition plan.</li> <li>Above bullet is pre-requisite to this task.</li> </ul>
<b>3. Utilization Management/Utilization Review:</b> <ul style="list-style-type: none"> <li>With input from Collaborative and providers, develop utilization management guidelines, including Clinical Care Criteria and diagnosis-driven service planning guidelines;</li> <li>Train providers in Clinical Criteria; publish criteria on Web site;</li> <li>Create July 1, 2005 service authorizations;</li> <li>Hire and train Physician Advisors; and</li> <li>Create UM policies, procedures and work flows.</li> </ul>	3/15/05	6/30/05  6/1/05  6/15/05  6/30/05 6/15/05 6/15/05	Clinical	Harris- Smith	CO	<ul style="list-style-type: none"> <li>Have begun to identify potential Clinical Services Advisory Committee members for development of clinical criteria and ongoing clinical advisory functions. Initial meeting to be held in May</li> <li>Draft policies and UM Program description including workflows in progress.</li> </ul>
<b>4. Grievance and Appeals:</b> <ul style="list-style-type: none"> <li>Write grievance and appeals policies, procedures, and work flows;</li> <li>Develop customer/family and stakeholder education materials about grievance/appeals process;</li> <li>Develop notification forms; and</li> <li>Hire and train staff.</li> </ul>	3/15/0	6/30/05  5/15/05  6/1/05  6/1/05 6/15/05	Clinical	Harris- Smith		<ul style="list-style-type: none"> <li>Work in progress; request assistance in obtaining necessary agency-specific procedures needed by 5/5/05</li> <li>In progress</li> <li>In progress</li> <li>Screening in progress /face-face interviews week of 5/10 -5/13</li> </ul>

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<b>Implement Critical Administrative Operations</b>						
<b>1. General Operations:</b> <ul style="list-style-type: none"> <li>Appoint transition staff responsible for facility acquisition, equipment purchase, and all other aspects of facility operations (utilities, telecommunications, etc.); and</li> <li>Acquire facilities and equipment, including telecommunications equipment.</li> </ul>	3/15/05	6/30/05 3/15/05  6/1/05	Admin Services	Jones		<u>Facilities Secured:</u> <ul style="list-style-type: none"> <li>Santa Fe Office to house Region 2, Region 6, Executive offices; computers arriving week of 4/25, phone service active by 4/30</li> <li>Albuquerque Office to house central administrative operations and Region 3-build-out designed and awaiting contractor bids.</li> <li>Roswell location secured, build-out being designed</li> </ul> Leases for Farmington and Las Cruces facilities are imminent.
<b>2. Staff Recruitment and Hiring:</b> <ul style="list-style-type: none"> <li>appoint HR implementation team staff;</li> <li>develop/implement staff recruitment and hiring plan, prioritizing critical functions (customer service, access line); and</li> <li>ensure that each department develops and implements a staff training plan for key functions.</li> </ul>	3/15/05	Ongoing 3/15/05  4/1/05  5/1/05	Exec Leadership Team	Enright		<ul style="list-style-type: none"> <li>HR implementation staff in place 3/15/05</li> <li>Recruitment plan implemented 4/1/05;</li> <li>Special recruitment conducted at Native American meeting 4/22.</li> <li>Initial go-live staff training plan in development for all departments;</li> <li>Following key positions have been filled:                             <ul style="list-style-type: none"> <li>CEO</li> <li>COO</li> <li>CMO</li> <li>CFO</li> <li>VP Provider Network</li> <li>VP Quality Mgmt</li> <li>VP Information Tech</li> <li>HR Director</li> <li>3 Regional Directors</li> <li>Manager, Native American/ Substance Abuse Peer/ Family Support Services</li> </ul> </li> </ul>
<b>3. Financial Management Systems:</b> <b>General Financial Management</b>	3/15/05	6/1/05	Finance Finance	Persinger/ Flowe		CFO hired; all tasks in progress.

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<ul style="list-style-type: none"> <li>• appoint transition finance team;</li> <li>• design financial management systems;</li> <li>• develop and test necessary automated systems to manage budgeting, provider payment, management of funds by funding stream, and monitoring of claims and encounter data at aggregate and provider levels;</li> <li>• develop financial policies, procedures, and protocols, including necessary internal and external forms and work flows; and</li> <li>• develop Phase One budget</li> </ul> <p><b>Claims Processing, Provider Payment, and Reporting</b></p> <ul style="list-style-type: none"> <li>• develop and test logic for claims/encounter processing;</li> <li>• develop work flows for claims adjudication and research, including provider assistance functions;</li> <li>• design and test provider payment processes for non-fee-for-service contracts;</li> <li>• develop reports necessary to monitor financial management functions;</li> <li>• hire and train staff;</li> <li>• distribute claims data specifications, claims forms and instructions, and web-based or other electronic formats for claims/encounter submission; and</li> <li>• provide on-site claims training for providers prior to July 1, 2005.</li> </ul>	3/15/05	6/1/05 3/15/05 5/1/05 6/1/05				
		6/1/05				
		5/1/05				
	3/15/05	6/30/05 6/1/05 5/1/05	Admin Services	Jones/ Montgomery		All tasks in process. No tasks currently due.
		6/1/05				
		6/1/05 6/15/05				
		6/1/05				
		6/15/05				
<b>4. Information Systems:</b>	3/15/05	6/30/05 3/15/05	IT	Montgomery		IS team appointed; system design and development in progress.
<ul style="list-style-type: none"> <li>• select IS implementation team;</li> </ul>						

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<ul style="list-style-type: none"> <li>recruit, hire, and train NM IS staff;</li> <li>develop necessary data bases and applications to implement all VO-NM data processing functions, between providers and VO-NM, between VO-NM and Collaborative, and across VO-NM departments;</li> <li>test all critical IS functions;</li> <li>develop provider education and training materials; provide on-site technical assistance to enable providers to successfully interact with all manual and automated processes for data submission;</li> <li>develop necessary management reports; and</li> <li>install and test all telecommunication systems, including ACD and IVR—test ability to report call management performance indicators.</li> </ul>		6/15/05 6/15/05  6/15/05 6/15/05  6/15/05 6/15/05				
<b>Implement Ongoing Network Development Functions</b>						
1. <b>Design and implement comprehensive Provider Education Plan</b> , to include at a minimum: <ul style="list-style-type: none"> <li>overview of SE system—The Collaborative Vision; What’s different, What’s the same; Phase One objectives and activities; service definitions and billing codes;</li> <li>contract and reporting requirements;</li> <li>customer enrollment, service registration, and service authorization requirements, policies, procedures, and forms;</li> <li>VO-NM Service Center and Regional Office</li> </ul>	3/15/05	Ongoing  6/1/05  6/1/05 6/1/05  6/1/05	Provider Network	Johnson  Nardini		VP of Provider Network has been hired; other recruitment ongoing; coordinated provider education and training schedule being developed.  VO will submit draft summary of VONM proposal for Collaborative review before May 1.

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<ul style="list-style-type: none"> <li>staff, functions, and how to report problems and obtain assistance;</li> <li>• provider credentialing policies, procedures, and forms;</li> <li>• VO-NM care management functions and how to access them; and</li> <li>• Phase One Provider Education/Training Plan.</li> </ul>		<p>6/1/05</p> <p>6/1/05</p> <p>6/1/05</p>				
<p>2. <b>Implement provider credentialing processes</b></p> <ul style="list-style-type: none"> <li>• For new providers</li> <li>• For current providers, to be implemented as the initial period of accepted credentials expires.</li> </ul>	<p>3/15/05</p> <p>3/15/05 6/1/05</p>	<p>Ongoing</p> <p>6/30/05 Ongoing</p>	<p>Provider Network</p>	<p>Johnson</p>		<p>VO has confirmed that currently contracted providers will not need to be additionally credentialed by 7/1/05. Credentialing process to be implemented in consultation with Collaborative after 7/1/05.</p>
<p>3. <b>Develop provider network management policies, procedures, and workflows—</b> including contracting, credentialing, and Provider Liaison functions.</p>	<p>3/15/05</p>	<p>6/30/05</p>	<p>Provider Network</p>	<p>Johnson</p>		<p>In process.</p>
<p>4. <b>Hire and train provider liaison staff.</b></p>	<p>3/15/05</p>	<p>6/30/05</p>	<p>Provider Network</p>	<p>Johnson</p>		<p>Recruitment in process.</p>
<b>Implement Regional Liaison Activities</b>						
<p>1. <b>Develop schedule of state/Collaborative meetings for VO attendance, per requests from Collaborative.</b></p>	<p>3/15/05 (State Mtgs)</p>	<p>Ongoing</p>	<p>Executive Leadership Team</p>	<p>Galbraith/ Enright</p>		<p>VO attending all identified Collaborative meetings.</p>
<p>2. <b>Begin regular attendance</b> at Local Collaborative meetings, per invitation.</p>	<p>TBD</p>	<p>Ongoing</p>	<p>Executive Leadership Team</p>	<p>Galbraith/ Enright</p>		<p>VO to begin attending Local Collaborative Meetings 6/1/05</p>
<p>3. <b>Begin regular on-site visits</b> to providers in each region.</p>	<p>5/1/05</p>	<p>Ongoing</p>	<p>Provider Network</p>	<p>Johnson</p>		<p>VO will meet with Rio Arriba 5/2 at provider's request. Developing a schedule of other provider meetings.</p>

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4. <b>Meet with customer, family and other advocate groups</b> in each region.	5/15/05	Ongoing	Recov and Resiliency	Knight		Developing a schedule of customer/family meetings.
<b>Implement Quality Management Functions</b>						
1. <b>Develop all quality management policies, procedures, and work flows.</b>	3/15/05	6/30/05	Clinical	Harris- Smith		In process – drafts currently being developed for Collaborative/VO customization.
2. <b>With Collaborative and BHPC, appoint QM committees.</b>	6/1/05	6/30/05	Clinical	Harris- Smith		Need assistance in designing integrated QM program.
3. <b>Develop provider and customer/family education materials and forms</b> related to grievance/appeals, incident reporting, and other QM functions.	3/15/05	6/15/05	Clinical	Harris- Smith		In process. Need clarification of how to reflect agency-specific grievance/appeals info in Customer Handbook.
4. <b>Develop formats for necessary reports;</b> work with IS team to program necessary reports.	3/15/05	Ongoing	Clinical/ IT	Harris- Smith/ Montgomery		In progress.
5. <b>Hire and train QM staff.</b>	3/15/05	6/30/05	Clinical	Harris- Smith		VP of Quality Management hired; other staff in active recruitment.
6. <b>Develop simple systems for tracking implementation problems and performance improvement opportunities,</b> including tracking and trending complaints, problem resolutions, grievances, and appeals.	3/15/05	Ongoing	Clinical/ IT	Harris- Smith/ Montgomery		In progress.
<b>Implement Monitoring of State Contract Requirements and Proposal Commitments</b>						
1. <b>Develop consolidated tracking tool for all requirements</b>	4/1/05	5/15/05	Executive	Enright Aumack		Initial tracking tool completed 4/25; final version due 5/1 for executive approval.