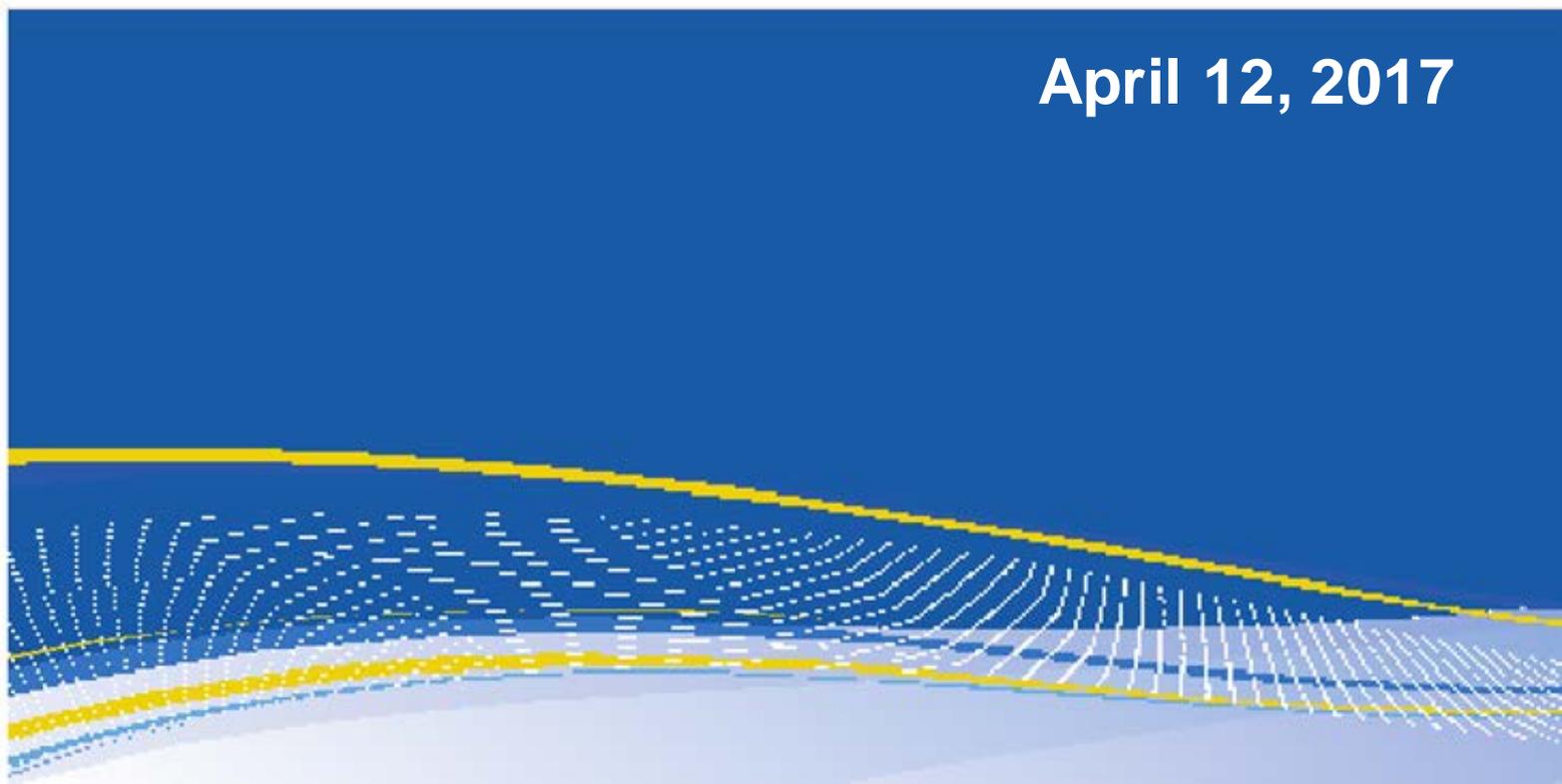




Home and Community-Based Settings Standard State Milestones

April 12, 2017



Milestones Overview

Milestones are the key steps states are taking or will take to implement their Statewide Transition Plan (STP) to comply with the home and community-based setting requirements.

CMS will track milestones in the Liberty website that is used for STP submission and will only track specific standard milestones (see below).

In order to collect consistent information, CMS has developed a standardized set of suggested milestones for states to use related to the following topics:

- Systemic Assessment and Remediation
- Site-Specific Assessment
- Site-Specific Remediation (Residential and Non-residential Settings)
- Quarterly Progress Updates

Process

- CMS will send a milestone template with the standard milestones and any pre-filled information CMS gathered from the state's STP.
- States then confirm the milestone information included and complete the missing information.
- After states submit the edited template back to CMS, the milestones are entered into the website for tracking.
- Once entered, if states want to make changes to the milestones, they may do so through the website. Part 2 of this training (in April) will review the milestone website.

Systemic Assessment and Remediation Milestones	Description	End date	Page No.
Completion of systemic assessment <i>[The date when overall completion of the systemic assessment, including review of all rules, regulations, and statutes]</i>	<i>Text from the state's STP describing completion of systemic assessment milestone.</i>	Please complete	#
Complete modifying rules and regulations, including provider manuals, inspection manuals, procedures, laws, qualification criteria, etc.	<i>Text from the state's STP</i>	Please complete	#

Process - continued

- All dates included in the template must also align with the STP.
- The *red italic text* provides additional details related to each standard milestone. Please reach out to CMS with specific questions.
- Some milestones may have the same proposed due dates, as these steps may be undertaken simultaneously.
- States are encouraged to provide additional details on each milestone in the description column.

Milestones Overview: Reporting

- The milestone template includes fields for month, day, and year of completion as well as the relevant page number and/or section in the STP (if applicable).
- Some of the standard milestones request that states report completion in percentages, such as 25% or 50% complete. This approach will provide the state and CMS with insight into progress towards completion of key aspects of the STP.
- **Please note:** the actual STP should contain more extensive detail related to each topic in this presentation, per CMS feedback to each state.

Milestone Tracking: HCB Settings Website

HCBS Statewide Transition Plan Website

[Home](#) / [Details of Statewide Transition Plan Status](#) / [Milestones](#)

Alabama: Milestones

Add

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Milestone Number	Milestone	Description	Start Date	Due Date	Status	Requested Status Change	Date Request Submitted	Requested New Due Date	CMS Questions Requiring Clarification
Showing 0 to 0 of 0 entries									

**Please note there are additional milestone fields that describe each milestone that are not in this graphic.*

Milestone Template

Milestone	Description	Proposed End Date	STP Page No.
Systemic Assessment and Remediation			
Completion of systemic assessment			
Complete modifying rules and regulations, including provider manuals, inspection manuals, procedures, laws, qualification criteria, etc.			
Implementation of new rules and regulations: 50% complete			
Implementation of new rules and regulations: 100% complete			
Site-specific Assessments			
Completion of site-specific assessment			
Incorporate results of settings analysis into final version of the STP and release for public comment			
Submit final STP to CMS			
Site-specific Remediation			
Completion of residential provider remediation: 25%			
Completion of residential provider remediation: 50%			
Completion of residential provider remediation: 75%			
Completion of residential provider remediation: 100%			
Completion of nonresidential provider remediation: 25%			
Completion of nonresidential provider remediation: 50%			
Completion of nonresidential provider remediation: 75%			
Completion of nonresidential provider remediation: 100%			
Identification of settings that will not remain in the HCBS System			

**Please note that this slide does not display all standard milestones.*

Standard Milestones: Systemic Assessment

Systemic assessment and remediation milestones include:

- the date of completion for the systemic assessment, and
- when the new rules, regulations and other state standards are modified and implemented.

Systemic Assessment and Remediation Milestones	End date	Page No.
Completion of systemic assessment		
Complete modifying rules and regulations, including provider manuals, inspection manuals, procedures, laws, qualification criteria, etc.		
Implementation of new rules and regulations: 50% complete		
Implementation of new rules and regulations: 100% complete		

**Please note: the actual STP should contain much more detail related to this topic, per CMS feedback to each state.*

Standard Milestones: Site-Specific Assessment

Site-specific assessment milestones include:

- the date of completion for the site-specific assessment,
- the incorporation of the results and analysis into the STP and release for public comment, and
- the date of final STP submission to CMS.

Site-Specific Assessment Milestones	End date	Page No.
Completion of site-specific assessment		
Incorporate results of settings analysis into final version of the STP and release for public comment		
Submit final STP to CMS		

**Please note: the actual STP should contain much more detail related to this topic, per CMS feedback to each state.*

Standard Milestones: Site-Specific Remediation

Residential provider remediation should be reported in % completion increments.

Site-Specific Remediation Milestones	End date	Page No.
Completion of residential provider remediation: 25%		
Completion of residential provider remediation: 50%		
Completion of residential provider remediation: 75%		
Completion of residential provider remediation: 100%		

**Please note: the actual STP should contain much more detail related to this topic, per CMS feedback to each state.*

Standard Milestones: Site-Specific Remediation

Nonresidential provider remediation should be reported in % completion increments.

Site-Specific Remediation Milestones	End date	Page No.
Completion of nonresidential provider remediation: 25%		
Completion of nonresidential provider remediation: 50%		
Completion of nonresidential provider remediation: 75%		
Completion of nonresidential provider remediation: 100%		

States should identify settings that will not remain in the HCBS system.

Site-Specific Remediation Milestones	End date	Page No.
Identification of residential and nonresidential settings that will not remain in the HCBS System		

**Please note: the actual STP should contain much more detail related to this topic, per CMS feedback to each state.*

Standard Milestones: Quarterly Updates

- Quarterly update milestones provide the state and CMS a mechanism for ensuring providers and/or settings remain in compliance during and after the transition period.
- These milestones typically begin after initial and/or final approval.

Ongoing Quarterly Progress Updates	End date	Page No.
Submit quarterly progress updates	Quarterly	

**Please note: the actual STP should contain much more detail related to this topic, per CMS feedback to each state.*

Please Note

This slide deck will be posted at <https://www.medicaid.gov/medicaid-chip-program-information/by-topics/long-term-services-and-supports/home-and-community-based-services/hcbs-training.html> for future reference.

Questions

