



Scope of Services

1. Purpose: The Contractor shall provide System Support Administration for the Refer 7 Database.
2. Definitions:
 - 2.1. Alliance for Information and Referral (AIRS): A consortium of National Information and Referral agencies developed standards to provide information and referral to individuals.
 - 2.2. The Balancing Incentive Program (BIP) is a discretionary grant awarded to the Department by the Centers for Medicare and Medicaid Services (CMS). It is intended to assist the State to rebalance the disparity between the amount of Medicaid funding for institutional long term services and supports and home and community based ones by encouraging the development of home and community based infrastructure changes such as the No Wrong Door access model, conflict-free case management and standardized assessments.
 - 2.3. Long Term Services and Supports (LTSS): These are home and community-based services provided to individuals support their level of independence in the home and community
 - 2.4. No Wrong Door (NWD): The NWD approach operationally involves a wide array of agencies and organizations in the Options Counseling Program so it can effectively reach and serve a broad range of populations. These population groups include older adults, people with physical disabilities of all ages, people with intellectual and developmental disabilities, and individuals interested in planning and/or paying for their LTSS needs.
 - 2.5. Refer7 Database:
 - 2.5.1. The database is owned by the Department.
 - 2.5.2. It is a searchable web-based resource that is available to the citizens of New Hampshire that provides information about the names of agencies who provide long term services and supports in the community, the specific types of services they offer and the conditions under which those services are typically available.
 - 2.5.3. The database is used by the Department and its contractors to document calls/contacts, demographics options counseling activity, contact and client follow up activities, case notes, and person centered action plans. Refer 7 also documents performance tracking, quality performance monitoring, as well as the ability to track client records and to generate reports.
 - 2.6. Users:
 - 2.6.1. Users are citizens (the public) who access the Refer 7 Database described in section 2.5.2.
 - 2.6.2. Users are the Department's staff, the Department's contractors and other parties or agencies identified by the Department that use the Refer 7 database as defined in Section 2.5.3 above.
 - 2.6.3. The Refer 7 Database System Support Administrator Contractor shall be considered a User to carry out the purposes of this Agreement.
3. The System Support Administration services are as follows, but not limited to:
 - 3.1. Assess and identify areas of improvement in using the Refer 7 database such as but not limited to the business operating standards, the skill level of the Users (defined in Section 2.6.2) as in Section 3.5, in using the Refer 7 database, and the Departments monitoring process to ensure AIRS standards are met.



Exhibit A

- 3.1.1. Within sixty (60) days of the effective date of the contract, the applicant shall provide the recommendations for improvement to the Department.
- 3.1.2. Upon review and approval of the improvements by the Department, the applicant shall complete a workplan as part of Section 1.13.8 outlining the tasks necessary to make the improvements.
- 3.2. Provide technical assistance that supports all the Refer 7 database program functions used by Users (defined in Section 2.6.1 and 2.6.2) statewide.
 - 3.2.1. Be available to the Users for on-call telephone technical assistance for forty (40) hours a week, Monday through Friday, between the hours of 8:30 am to 4:30 pm;
- 3.3. Revise the existing Refer7 database policies, training manuals, and tip sheets as instructed by the Department;
 - 3.3.1. Expand existing Refer7 policies by ensuring all populations and all payers are identified and included according to Balancing Incentive Program (BIP) requirements.
 - 3.3.2. Ensure the full range of Community Long Term Services and Supports (LTSS) options for all populations and all payers are integrated into the policy manuals and tip sheets.
- 3.4. Ensure that the Citizens of New Hampshire have access to accurate and timely information about the full range of LTSS based on their individual needs and preferences and ability to pay found in the Refer 7 database. The Contractor will:
 - 3.4.1. Update and Maintain on a continuing basis and according to the Alliance for Information and Referral standards (AIRS), current information in the Refer 7 database about services offered by human service agencies in New Hampshire by:
 - 3.4.1.1. Confirming accuracy and the completeness of information that currently resides in the Refer 7 database;
 - 3.4.1.2. Establishing contact with new agencies and obtaining detailed information about their program;
 - 3.4.1.3. Obtaining information on organizations that provide long term support services;
 - 3.4.1.4. Ensure the information available in Refer7 reflects the full range of Medicaid LTSS options available in the state according to BIP requirements;
 - 3.4.1.5. Coordinating final database inclusion/exclusion decisions and informing the service provider; and
 - 3.4.1.6. Entering the information into the Refer 7 database.
- 3.5. Assess and identify skills needed by the Users (as defined in Section 2.6.2) to use the Refer 7 Database.
 - 3.5.1. Report to the Department the needs of the users;
 - 3.5.2. Develop training sessions to train new users and needs for existing users
 - 3.5.3. Develop a training schedule of dates and locations;
 - 3.5.4. The training and the schedule shall be reviewed and approved by the Department within 90 days of contract effective date;
 - 3.5.5. Perform the training and provide training materials for all users of Refer7.
 - 3.5.6. In partnership with the Department staff and contractors, develop training for users including BIP Partners who will use the searchable database and Refer7 tools made available to them through BIP.
- 3.6. Convene a Refer 7 database user workgroup.



Exhibit A

- 3.6.1. Facilitate the workgroup to identify system and user problems and provide recommended solutions to the Department.
 - 3.6.2. User workgroup must include a member of the BIP Stakeholder Committee.
 - 3.7. Create reports and mailing lists as requested by the Department.
 - 3.8. Create a paper service directory with agency names, contact information and services.
 - 3.9. Manage and assure proper user accessibility according to user roles and policies
 - 3.10. Monitor the quality of the data entered into the system by the Users (as defined in Section 2.6.2).
 - 3.11. Identify and communicate to the Users (as defined in Section 2.6.2) the additions and updates the Department makes to the Refer 7 database.
 - 3.12. Reporting Requirements will be a component of the work plan.
 - 3.13. The Contractor shall:
 - 3.13.1. Complete training by the Department on the Refer 7 database in within thirty (30) days of the effective date of the contract.
 - 3.13.2. Comply with the AIRS standards;
 - 3.13.3. Work forty (40) hours per week as directed by the Department;
 - 3.13.4. Of the total hours worked during the contract period, the Contractor shall work up to 390 hours on activities that support the No Wrong Door (NWD) Balancing Incentive Program (BIP) efforts as outlined in this scope of work.
 - 3.13.5. Sign and comply with the State of New Hampshire, Office of Information Technology Computer Use Agreement and the Refer 7 System User Confidentiality Agreement.
 - 3.13.6. Complete and submit a record of all activities completed and time worked each week to include identifying specific activities related to BIP deliverables and tasks to the Department.
 - 3.13.7. Provide the Department with a monthly report showing all agency, site, and service profiles and fields added to or updated in the refer 7 database including the date of the activity.
 - 3.13.8. Provide the Department with a detailed project plan to complete the scope of work, within 90 days of contract effective date. The work plan shall identify the deliverables, how the deliverables will be completed, who will complete the deliverables, and timelines for completion of the deliverables. The Contractor shall use a work plan template as instructed by BEAS.
 - 3.13.8.1. During the course of this contract period it may be necessary to revise or modify the deliverables and the work plan referred to above to meet the primary objectives defined by the federal grantor. BEAS will work with the Contractor to develop a revision that takes into consideration resources and timelines for completion. The above-mentioned work plan to be developed will be adjusted accordingly, but in no case will timelines extend beyond the grant award period and or contract period.
4. Staffing
- The Contractor agrees to adhere to the following staffing requirements:
- 4.1. Provide sufficient staff to perform all tasks specified in this Agreement. The Contractor shall maintain a level of staffing necessary to perform and carry out all of the functions, requirements, roles, and duties in a timely fashion.
 - 4.2. The Contractor shall verify and document that all staff and volunteers have appropriate training, education, experience, certifications, and licenses, and orientation to fulfill the



responsibilities of their respective positions. Staff providing the direct work shall maintain AIRS certification and Certified Resource Specialist Certification.

- 4.3. The Contractor shall keep up-to-date personnel and training records and documentation of all individuals requiring licenses and/or certifications. The Contractor shall develop a Staffing Contingency Plan and shall submit its written Staffing Contingency Plan to DHHS within thirty days of approval of the Contract Agreement. The plan shall include but not be limited to:

- 4.3.1. The process for replacement of personnel in the event of loss of key personnel or other personnel during the period of this Agreement;
- 4.3.2. A description of how additional staff resources will be allocated to support this Agreement in the event of inability to meet any performance standard;
- 4.3.3. A description of time frames necessary for obtaining staff replacements;
- 4.3.4. An explanation of the Contractor's capabilities to provide, in a timely manner, staff replacements/additions with comparable experience; and
- 4.3.5. The method of bringing staff replacements/additions up-to-date regarding this Agreement.

5. E-Studio Electronic Information System

The Contractor shall be required to use BEAS' E-Studio electronic information system. E-Studio is BEAS' primary vehicle for uploading important information concerning time-sensitive announcements, policy releases, administrative rule adoptions, and other critical information. Contractor shall identify all of the key personnel who need to have E-Studio accounts to ensure that information from BEAS can be shared with the necessary agency staff. There is no cost to the contractor for BEAS to create an E-Studio account and no limit on the number of staff an agency identifies to have access to E-Studio. Contractor shall ensure that their E-Studio account(s) are kept current and that BEAS is notified when a staff member is no longer working in the program so his/her account can be terminated.

6. Criminal Background and Adult Protective Service Registry Checks

- 6.1. Contractor shall conduct a New Hampshire criminal background check if a potential applicant for employment or volunteer, funded under this contract, may have client contact.
- 6.2. Contractors which are licensed, certified or funded by the DHHS shall meet the requirements of RSA 161-F: 49, which requires the submission of the name of a prospective employee who may have client contact, for review against the State Adult Protective Service Registry.

7. Grievance and Appeals

The Contractor must maintain a system for tracking, resolving, and reporting complaints regarding its services, processes, procedures, and staff. The Contractor shall have grievance system in place that includes a grievance process and any grievances filed are to be available to DHHS upon request. At a minimum the process shall include the following:

- 7.1. Name of person,
- 7.2. type of service,
- 7.3. date of written grievance,
- 7.4. nature/subject of the grievance,
- 7.5. who in the agency reconsiders agency decisions,
- 7.6. what are the issues that can be addressed in the grievance process, and how consumers are informed of their right to appeal or file grievances.