

CCO and Provider Partnership Meeting Minutes

July 2026

Mission Statement: Connect people to the care, support, and opportunities that maximize their quality of life.

Vision: A community where all people lead fulfilling lives.

Core Values: People, Integrity, and Trust

Partnership Purpose: A group of Provider and CCO professionals that work together to improve processes and deliver high quality services for individuals and families with I/DD.

Attendance

Person Centered Services:

Katelyn Luke-Moore, Provider Relations Manager; Maria Kirkpatrick, Provider Relations Manager; Alan Venesky, AVP Stakeholder Relations; Sherry Johnson, AVP Operations, Scott Estee, Local Director; Elizabeth Klepes, Local Director; Haley Miller, Director of Operations, Kelly Lincoln, COO

Agencies:

Able2: Maria Elston, Director of Day Supports

AIM Independent Living Center: Anne Crozier, FI Coordinator

Arc of Monroe: Kim Rinehart, Quality Improvement Manager

Arc of Ontario: Gabrielle Johnson, Program Services Coordination Supervisor; Benjamin Burke, Person Centered Supports Manager

Arc of Erie: Kathleen Wahila, Program Administration Coordinator/ QIDP

Arc of GLOW: Jennifer Warner, Director of HIPPA and QI

Aspire: Jenna Astridge: Director of Agency Outreach & Central Intake

Beyond Support Network: Erin Pappas, Coordinator of Community Habilitation; Alison Siwinski, Coordinator of Day Services; Renee Nowicki, Coordinator of Community Pre-Voc; John Augustyn, Chief Compliance Officer

Community Services for Every1: Michelle Zangerle, Director of Vocational and Habilitation Services; Cheryl Houston, Residential Hab Coordinator

Finger Lakes DDSO: Contina Rice, MHPES 3

Intandem: Beth Hensel, Corporate Compliance Specialist; Heather Kranock, Document Retention Manager

Mozaic: Michele Vangiesen, Director of Day Services; Jen Goodman, VP of Day Services, Clinic, Marketing & Development

OLV Human Services: Michelle Gomolka-Ciesla, Director of Residential Services

Pathways: Amy Nichols, Compliance Coordinator

People Inc: Natalie Ryan, AVP of Community Based Services

The Resource Center: Kevin Anderson

The Summit Center: Wendy Loverme, Director of Community and Adult Services

Western New York DDSO: Brittany Abramson, Habilitation Specialist 2 / SPOC / QIDP; William Emhof; Jennifer Chambers, Habilitation Specialist 2, Nicole Watson, Mental Hygiene Program Evaluation Specialist

Agenda

- Icebreaker
- Updates
- Operations Updates
- Portal Updates
- Upcoming Events
- Provider Resources

Quick Housekeeping Reminders

- We ask that cameras remain on throughout the meeting
- The purpose of these meetings is to share, gather and discuss
- Information from these meetings should be disseminated out within your agency
- For previous meeting minutes, you can find them on our website:
[Provider Partnerships - Person Centered Services](#)

Care Coordination Reminders & Updates

- Certified Residential Opportunity (CRO) Process Review
 - CROs are completed based on the assessed need of the person
 - Care Coordinators update them on an annual basis, or sooner if needed, once they are in the system with OPWDD

- Care Coordinators cannot reach out to providers directly to request or inquire about residential placement, once OPWDD reviews and approves of the CRO submission, they are in communication with the agency
- Post Life Plan Survey
 - A survey is now being sent out to individuals, their guardians (if applicable) to gather information on their Life Plan experience
 - This was rolled out in May 2026, and we've received ~214 responses; an average of 70 are sent each day, with 4-5 responses received

Operations Reminders & Updates

- Life Plan documents post-finalization of the Life Plan
 - Providers who are Portal users; upload documents into the Portal
 - Providers who are not Portal users; send documents to the Life Plan Single Point of Contact (SPOC): lifeplan@personcenteredservices.com
- Our SPOC will make 3 attempts to gather the Attachment B (Acknowledgement and Agreement) from a provider; once those 3 attempts have been made with no response provided, the SPOC will use the Staff Action Plan (SAP) if that has already been sent
 - This is outlined in our internal guidance, as well as the CCO Handbook
 - Exceptions to this would be if an addendum has been requested by the provider
 - If the provider has signed the Life Plan via the Portal, attempts will not be made to gather Attachment B

Portal Updates

- Administrative Access Dashboards
 - Reporting features are not available for those that have **admin access**
 - First name, last name, TABS ID
 - Medicaid expiration
 - Our data comes from CHOICES. We receive this on the first of the month. Updates are made on the 10th of the month, and the updates are not shown until the 1st of the following month. We don't currently have a solid SSI / SSD indicator, but our understanding is that if someone is receiving SSI / SSD then their Medicaid does not expire.
 - Medicaid ID
 - LCED date
 - DDP2 date
 - OPWDD Eligibility Diagnosis
 - CAS / CANs finalization date
 - Life Plan tracking
 - Annual Life Plan, Semi-Annual Life Plan, and addendums
 - Version number

- Meeting date
 - Status
- Self – Direction Documents Uploads
 - Pending drop downs available to upload Self-Direction documents: budgets, broker agreements, etc.
- Secondary Signer Pilot
 - Continuing ongoing progress with pilot agencies
- Importance of the correct agency name in CHOICES and in the Life Plan
- Portal change requests submitted via Microsoft Form.
 - [Person Centered Services Provider Portal Access Request](#)
 - For all other requests, such as issues with logging into the Portal or issues with signing / viewing the Life Plan, that do not fall into these categories, please continue to e-mail the Portal Account:
portalaccount@personcenteredservices.com
- Changes to Portal Walkthrough Trainings
 - With the new reporting features being available to administrative access, we will be separating the walkthrough training into 2 sessions
 - Caseload model access
 - Will include a full walkthrough of the Portal utilization to include Life Plan signatures, caseload reviews, and EPIN
 - Administrative model access
 - Higher level overview with more focus on the reports that are available

Portal Flow Guidance

- Contact Portal Account for access, document, or technical issues.
- Contact Life Plan SPOC for addendums or finalized plans.
- Contact Care Coordinator for plan visibility or delays.
- Contact Provider Relations for escalation or liaison support.

Upcoming Events

- Life Plan Literacy – August 19, 2026.
- CCO/HH Overview - November 18th, 2026
- Portal Walkthrough Trainings
 - Administrative Access:
 - Tuesday, August 11th: 10:00am
 - Tuesday, September 8th: 1:00pm
 - Tuesday, October 13th: 10:00am
 - Tuesday, November 17th: 1:00pm
 - Tuesday, December 15th: 10:00am
 - Caseload Model Access:
 - Tuesday, August 11th: 1:00pm

- Tuesday, September 8th: 10:00am
- Tuesday, October 13th: 1:00pm
- Tuesday, November 17th: 10:00am
- Tuesday, December 15th: 1:00pm

Provider Engagement

- Opportunity for agencies to participate in panel discussions via Provider Relations.
- Supported Employment and Pre-Vocational Services – August 12th (East), August 13th (West)
 - If you would like to register as a panelist, please connect with Provider Relations: providerrelations@personcenteredservices.com

Agency Openings

- Monthly updates must be submitted by end of month to remain listed.
- Includes service, referral, and requirement information.

New Initiatives

- Member Connections virtual series available for member engagement.

Resources

- Disability Services of New York Directory - [Services for Intellectual and Developmental Disabilities in NY State | Disability Services NY Directory](#)
- Provider Partnership Meetings Minutes - [Monthly Provider Partnership Meeting Minutes - Person Centered Services](#)
- Provider Relations - [Provider Relations - Person Centered Services](#)
- Provider Portal - [Provider Portal - Person Centered Services](#)
- Submission for Service Announcements - [Service Announcements - Person Centered Services](#)

Next Steps

- Attendees to share updates internally to leadership and teams.

Round Table

- Discussion of provider concerns, updates, and successes.