

Case Management Survey - DDW Billing Tool

Agency/Region:	Service: DD Waiver Case Management
Individual / Identifier:	
Surveyor Completing:	Date/Time:

Surveyor Instruction: The CM is required to meet face-to-face with adult DD Waiver participants at least 12 times annually (one time per month) to bill for a monthly unit and JCMs require two face-to-face contacts per month to bill the monthly unit, one of which must occur at a location in which the person spends the majority of the day (i.e., place of employment, habilitation program), and the other contact must occur at the person's residence. Other billing findings include but are not limited to NO name of the recipient of the service; location of the service; date of the service; start and end times of the service; signature and title of staff, etc. This would not be met if there was no face to face or if there were missing documentation elements.

	<i>Dates of face-to-face contact & location (Home-HV or Site-SV)</i>	<i>Time of each visit</i>	<i>Total billable service time per month</i>	<i>Units Billed by AGENCY- Examine billing documentation; does it match the total service time listed in column to the left. IS IT JUSTIFIED? If not, why?</i>
<u>MONTH 1</u>				
<u>MONTH 2</u>				
<u>MONTH 3</u>				