

New Mexico DOH / DHI / QMB Case Manager Interview - Individual Specific Interview Survey Tool

Standard of Care	Surveyor Notes	MET	NOT MET	NA
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Agency/Region:	Service: DD Waiver Case Management
Surveyor:	Date/Time:

Individual Name and Identifier:

Case Manager Interviewed / title (Identifier): **Interview Format:** Telephone In-Person

Services (Circle those that apply):
Services (Circle those that apply to Individual):

- **Living Care Arrangement:** Supported Living – Family Living - Intensive Medical Living Supports - Customized In-Home Supports
- **Community Inclusion:** Customized Community Supports – Community Integrated Employment Services
- **Other Services:** PT - OT - SLP - BSC - Adult Nursing Services other:

Surveyor Instruction: During the interview you must directly quote what is said by the CM and document it in the surveyor notes. This document must be completed for each person in the sample that the case manager provides services for.

<p>Please tell me about the (Individual) The following bullets can be used as guidance to start conversation but the entire interview should be used to determine if the CM “knows” the individual.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Likes <input type="checkbox"/> Dislikes <input type="checkbox"/> Services <input type="checkbox"/> Medical Conditions <input type="checkbox"/> Guardian/Family <input type="checkbox"/> Allergies <input type="checkbox"/> Activity Level (current as well as any changes) <p>Surveyor Instruction: This question is intended to open the line of communication with the CM. The CM may answer multiple questions (below) when discussing this question. When you get to a related question in the interview tool you can have the CM expand on what they have already told you, if needed. Case Managers are typically noted as being required to be at an awareness level per IST unless otherwise noted in the IST section of the ISP. All topics may not apply to the specific individual you are interviewing for. You are probing to identify what the case manager is aware of. This is not an all-inclusive list. They may use the agency file to refer to information. This is met if the CM is able to tell you about the individual.</p>	<p>Tag #1A22 / 4C02 (CoP)</p>			
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<p>Does <u>(Individual)</u> require any type of assistive technology or adaptive equipment?</p> <p><u>Surveyor Instruction:</u> Using the IDF, AT Inventory, ISP, CARMP, therapy reports, etc. determine what is required by the person receiving services. They may use the agency file to refer to information. CM must be aware of assistive technology and adaptive equipment required per AT Inventory for this to be met.</p>	<p>Tag #1A22 / 4C02 (CoP)</p> <p>List is not all inclusive:</p> <ul style="list-style-type: none"> <input type="checkbox"/> glasses <input type="checkbox"/> hearing aid <input type="checkbox"/> wheelchair <input type="checkbox"/> hospital bed <input type="checkbox"/> grab bars <input type="checkbox"/> cane/walker <input type="checkbox"/> modified utensils <input type="checkbox"/> VOCA <input type="checkbox"/> buttons/switches <input type="checkbox"/> DME: i.e. O2 tanks, nebulizer, CPAP <input type="checkbox"/> Hoyer <input type="checkbox"/> List Other Found: _____ 			
<p>Does <u>(Individual)</u> have Therapies? If yes, what are they and do you know why they are needed?</p> <p><u>Surveyor Instruction:</u> If the CM can tell you what the therapies are and why the person receives them this can be met, as they need to have an awareness level per IST. They may use the agency file to refer to information.</p>	<p>Tag #1A22 / 4C02 (CoP)</p>			
<p>Does <u>(Individual)</u> have a CARMP, HCPs and/or MERPs. If yes what are they?</p> <p><u>Surveyor Instruction:</u> If the CM can tell you what the CARMP / HCPs / MERPs are this can be met, as they need to have an 'awareness' level per IST. They may use the agency file to refer to information.</p>	<p>Tag #1A22 / 4C02 (CoP)</p>			
<p>What Progress has <u>(Individual)</u> made over the last year?</p> <p>Has <u>(Individual)</u> regressed over the last year? If yes, how has it been addressed?</p> <p><u>Surveyor Instruction:</u> The CM is responsible for monitoring by conducting visits, reviewing documentation, calls, emails, etc. from IDT members. For this to be met the Case Manager must be able to discuss progress / regression identified. If regression is found or the CM believes there has been regression, has it been addressed? If the Case Manager is aware of regression and has not addressed, this cannot be met and is a potential CoP. The surveyor must document specifics identified by the CM to why it was not addressed.</p>	<p>Tag #1A22 / 4C02 (CoP)</p> <p align="center">/</p>			