

DDSD-DDW Numbered Memo 2017-9  
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June 26, 2017

To: DD Waiver Case Management Agencies Directors and DD Waiver Case Managers

Cc: DD Waiver Providers and Outside Review C.O.R.E. Team

From: Christina Hill, DDW Program Manager   
Lisa Martinez, DDW Statewide Case Management Coordinator 

Subject: Roll Out of Clinical Criteria V3 and Budget Worksheet (V OR 2017-07)

On July 1, 2017, Clinical Criteria V3 and the Budget Worksheet (BWS-V OR 2017-07) will be in effect. Regional training to stakeholders has taken place across the state throughout June 2017. Please visit the ACT New Mexico website to find the newly issued documents, forms and training materials: <http://actnewmexico.org/forms-instructions.html>.

Teams must plan accordingly so that the appropriate documentation to demonstrate clinical criteria and the correct version of the BWS are submitted to the C.O.R.E. team. Please be advised that Clinical Criteria V3 will be applied for all submissions that require planning on or after July 1, 2017 and that it will take a full year for everyone to transition to the new BWS (v. OR 2017-07).

The roll out for the uptake of forms, instructions and Clinical Criteria V3 is as follows:

1. Submission timelines for annuals, revisions, Mi Via transfers, and children turning 18 remain the same (e.g. For annuals, submissions must be 60 days prior to ISP start date; for revisions, 30 days prior to date revision would be in effect).
2. For any submission received by the C.O.R.E. Team prior to July 1, 2017, Clinical Criteria V2 will be applied.
3. For any annual or revision which required team planning prior to July 1, 2017, the Clinical Criteria V2 will be applied.
4. For any annual submissions with ISP start dates 10/1/2017 or after, Clinical Criteria V3 will be applied.
5. For any Mi Via transfers or children turning 18, Clinical Criteria V3 will be applied to any submissions planned for after July 1, 2017
6. For any late annual submissions or late revisions, which are submitted to the C.O.R.E team on or after 8/1/2017, regardless of effective date of the ISP or revision, the Clinical Criteria V3 will be applied.

The grid below provides detailed transition instructions.

	Clinical Criteria		BWS	
	V. 2	V.3	(V OR 2015-10)	(V OR 2017-07)
<b>Annual Submissions made after July 1, 2017</b>				
<b>ISP Start Dates 9/1/2017 to 9/30/2017</b>	x		x	
<b>ISP Start Dates 10/1/2017 and after</b>		x		x
<b>Late submissions made after 8/1/2017, regardless of ISP start date</b>		x		x
<b>Revisions with start dates on or after 8/1/2017</b>				
<b>Revisions that do NOT involve changes to SL, IIBS-SL, CCS-Group, CIE-Group or any LCA Change</b>		x	x (approved in sequence)	
<b>Revisions that DO involve a change to SL, IIBS-SL, CCS-Group, CIE-Group or any LCA Change</b>		x	x (close)	x (open)
<b>Mi Via Transfers and Children turning 18</b>				
<b>Submission made before 8/1/2017</b>	x		x	
<b>Submissions made on or after 8/1/2017</b>		x		x (open)

DDSD encourages you to contact your Regional Office with questions about the Clinical Criteria and Budget Worksheet or contact Statewide Case Management Coordinator Lisa Martinez at [Lisa.Martinez@state.nm.us](mailto:Lisa.Martinez@state.nm.us) or 505-476-8841.