Date: November 1, 2021

To: Developmental Disabilities Waiver (DDW) Case Managers and Providers

From: Jason Cornwell, Director

CC: Marie Velasco, DD Waiver Program Manager

Subject: New Budget Worksheet (BWS) and Clinical Criteria V6

The Centers for Medicare & Medicaid Services (CMS) has approved New Mexico’s Developmental Disabilities 1915 (c) Home and Community-Based Services (HCBS) waiver. A new Budget Worksheet and Clinical Criteria V6 is issued with this memo. Implementation follows:

Child budget submissions:
1. Please note the 11-1-21 Budget Work Sheet for non-JCM will now include Child Budgets.
2. Annual Submissions on or after 12/01/2021 will be submitted to the UNM C.O.R.E. for ISP dates on or after 1/15/2022 and will require a full clinical review.
3. Revisions on ISP terms starting prior to 1/15/22 will continue to follow the current process.

Ongoing child submissions will fall under the same clinical review schedule, as adult budget submissions.

Implementation of the revised Budget Worksheets will proceed as follows:
1. Case Managers are issued two new BWS:
   a. BWS V-JCM-2021-11-01
   b. BWS V-OR-2021-11-01 which is for adult non-Jackson Class Members and Child Budgets.
2. Sequential revisions on a previously approved BWS (BWS V-JCM 2020-10-01 or BWS V-OR-2020-10-01) should continue to be submitted on the same BWS until the Individual Service Plan (ISP) term is complete.
3. There are NO CHANGES to the budget submission process. However, the appropriate new BWS should be used for all annual and initial (new allocations) submissions made on or after 12/01/21.
   a. Annual and initial BWS submitted on or after 12/01/21 using the old BWS (V-OR-2020-10-01 or V-JCM-2020-10-01) will be issued an Unable to Work from the CORE or a Request for Information (RFI) from the TPA.
4. If a Case Manager is able to submit the annual or initial on the new BWS prior to the 12/01/21 implementation date, the BWS will be accepted by the CORE (for children and Non-JCM’s) and TPA (For JCM’s).

**Clinical Criteria:**

1. Clinical Criteria V6 is effective on 12/01/2021 and will be applied to all submission on or after 12/1/21 regardless of BWS. Clinical Criteria V6 includes:
   - Align the Clinical Criteria to DD Waiver Standards
   - Removal of Individual Intensive Behavioral Supports (IIBS)
   - Increased limit on Assistive Technology from $250 to $500
   - Increased limit on Non-Medical Transportation from $750 to $810
   - Inclusion of review for child budgets
   - Details included in the clinical review versus validation
   - Incorporation of the frequency of clinical reviews
   - For any revision being submitted on the old BWS’s (BWS V-JCM 2020-10-01 or BWS V-OR-2020-10-01) that include a service that is on the new BWS’s (BWS V-JCM-2021-11-01 or BWS V-OR-2021-11-01), please contact DDSD to migrate to the new BWS prior to the renewal of ISP term.