

**Summary**  
**Statewide Case Management Director's Meeting**  
**July 27, 2017**  
**10:00 am to 2:00pm**  
**CDD Room 103 East**  
**Short Lunch Break /Working Brown Bag Lunch**

**10:00 - 10:15 am Welcome and Introductions**

**10:15 - 11:00 Healthcare Coordination Elizabeth Finley**

CSB Bureau Chief Betsy Finley and Medical Director Dr. Voorhees reviewed Healthcare Coordination (HCC) roles and responsibilities related to the Jackson Lawsuit and requested feedback. Also, note that on August 9<sup>th</sup>, the HCC Chapter of the DD Waiver Service standards will be posted on the Act New Mexico Website and that more feedback can be provided through an electronic survey and the Feedback Forum being held at the BOW August 16<sup>th</sup>.

**11:00 -11:30 HSD Annabelle Martinez, Leann Adams and Joleen Mondragon**

HSD team discussed:

- Memo regarding Implementation of the Qualis Health Provider Portal “Jiva System”  
All Regional Office Case Managers now also have access to Jiva. Please refer to the Qualis Website for registration, trainings, and guides if needed. Qualis will do onsite training if needed. If no response to emails or calls for locked accounts or when any difficulties arise that cannot be resolved through Qualis please contact Leann Adams at HSD.
- Memo sent out regarding Qualis Health Provider Portal Requirement for Level of Care Requests and Prior Authorization Requests
- Memo sent out regarding: Closure of Terminated Supplemental Security Income Medicaid Extensions
- ISD issue around COE's. A reminder given to the field on the importance of the use of the CIU form. A current CIU form will ensure that client address is updated, that the client rep and/or the CM information is current. The CM will receive 45-day notices if they are on the CIU.
- An updated SOP is in place with the TPA, Qualis Health. Actions plans are no longer required for children's budgets.
- Late LOC Process:
  1. Case Manager will submit a complete and accurate Late LOC packet to the Regional Case Management (CM) Coordinator requesting a retroactive request. The request must include the reason for the late submission and a plan for prevention of any future late LOC's.
  2. Regional CM Coordinator will assure the packet is complete and accurate, make a determination of approval and write a letter of approval on the DDS letterhead and include a signature. (If the packet is not complete or accurate the Regional CM Coordinator will work with the CM to get the packet correct.)
  3. Regional CM Coordinator will track all Late LOC retroactive requests, reason for late submission and follow up with CM and CM supervisor to provide training or technical assistance with the CM's as necessary. Continued late submissions by CMs or CM agencies may result in contract

management actions. The Late LOC list will be sent by HSD from Qualis to the Regional CM Coordinators as a tracking tool for enforcement of contract management actions.

4. Regional CM Coordinator or Regional Director will provide the CM an approval letter for the LOC retroactive request.
5. CM will upload the complete LOC packet, including the approval letter, to Jiva.
6. Qualis Health will process and approve the LOC or issue an RFI, as appropriate.
7. CM's will respond to any LOC RFI's if requested by Qualis Health.

### **11:300 – 12:30 DDW Unit**

- **ISP Redesign and other updates - Christina Hill**

1. "Quick Pulse" Exercise conducted with Case Management Directors and guest to the meeting rate how empowered CM's generally feel to:
  - a. conduct true PCP
  - b. work with teams to develop meaningful ISPs
  - c. work with teams to submit appropriate budgets

The "pulse" was low i.e. consensus was that case managers do not feel empowered.

2. Related Updates:

- a. DDSD is working on are several routes in standards /requirements to empower case managers:
  - i. IQR And QMB surveys
  - ii. Training and TA
  - iii. ISP Clinics
  - iv. Written Directives to all providers including DDW Standards edits e.g. DDW Standards are being written to emphasize shared responsibilities and address concerns Case managers have about managing an IDT where other providers do not always understand their own responsibilities.
  - v. ISP Redesign

3. ISP Redesign Update

- a. DDSD has worked with a contractor March through June 2017 who has provided national trends, sample from other states.
- b. Three sample/prototypes of sections of an ISP were reviewed and discussed. Samples reviewed were for discussion purposes and not being formally proposed
- c. DDW Service Standards PCP Chapter were reviewed which included a sample section for ISP to demonstrate Informed Choice was added
- d. CMAAC resubmitted an ISP template for DDSD review
- e. Case Managers encouraged to attend DDW Service Standards Feedback Forum or submit electronic feedback August 16 which includes Chapters on Human Rights and Settings Requirements, PCP and ISP
- f. DDSD will soon be opening dialogue again with stakeholders for ISP redesign

- **CCS in Home:**

Case Managers (CM) will identify any individuals who are currently receiving CCS In- Home services on their caseload. Case managers will then send the requested information below to their Regional Office Case Management Coordinator through SCOMM by August 10, 2017.

Individuals name:

Contact Info:

Expiration Date:

Fading Plan

Jackson Class:

Once all individuals are identified by the Regional Office Case Management Coordinators they will be reaching out to the case managers to assist with the fade out plan. Teams must meet and implement the fade out plan as they are determined. Case managers can contact their Regional Office Case Management (CM) Coordinator when and/or if there are concerns or questions.

Update: Due to not receiving a response from everyone an additional email request was sent asking all agency directors to send an email with the information to your Regional Office Case Management Coordinator through SCOMM and cc me on this by COB of August 31, 2017. The request asked for all agency directors to indicate the individuals who are receiving this or indicate if your agency does not have any individuals receiving this service.

**12:30 – 1:00 Break**

**1:00 – 1:15 DDSD Updates - Lisa Martinez**

- **ANE: Case Manager Responsibilities Interim Training:**

DDSD and DHI have identified the need for an interim plan for new case managers to be trained on Case Manager Responsibilities Regarding Findings of ANE Reports. Until a plan has been finalized, Agency Directors need to provide the names of case managers who need the Case Manager Responsibilities Regarding Findings of ANE Reports training by August 10, 2017. Once the list of case managers has been compiled by Lisa Martinez a training date and method will be determined. Lisa Martinez will send out notification identifying the details of the training to the agency directors. Thereafter, agency directors should notify Lisa Martinez one week after a new hire so a new training date can be identified for the new employees. Certificates were provided to each agency for all case managers who completed the training. A draft of the FAQ from DHI was provided to the field.

- Revised NM DD Waiver Outside Reviewer Cover Sheet has been updated with the feedback given from the field and is ready for use on the ACT website.
- Reminder of the Notice of Right to Appeal letter sent to field.

**1:15 – 1:30 pm Jackson Class transition– Kathy Kunkel**

JCM's will transition from the 2007 Standards to the current Standards. DDSD is working with HSD to develop billing codes which will only be available for JCM's. A new BWS is being developed specifically for JCM's only. A formal memo of instruction will be sent to the field until then, continue to use current processes.

### **1:30 - 2pm Employment First Training – Carrie Roberts**

Carrie Roberts, Community Inclusion Manager spoke about the DVR Outreach Project, how supported employment is helping individuals obtain meaningful jobs, the discovery process and how it relates to informed choice. The project gives individuals experience through discovery and informed choice in their employment. The group is currently working with identified JCM's. The pilot project has begun with 11 JCM's at the Los Lunas Community Program. CM's and guardians of the identified JCM's will be informed of the process. Ms. Roberts heard feedback about needing to keep CM's informed.

Update: An email was sent on 7/31/2017 which served as a follow up from the statewide agency directors meeting. The attachment provided instruction on CCS In-Home services, the process for submitting late LOC's and the interim plan for any case managers who need the ANE: Case Manager Responsibilities training. A request to complete the meeting evaluation on survey monkey was also included in the email.

**Next meeting: 10/26/2017 10am -2pm**

Please complete evaluation survey: <https://www.surveymonkey.com/r/K9SNTVR>

#### **Attachments:**

HEALTHCARE COORDINATION POWERPOINT 20170607

Healthcare Coordination Roles and Responsibilities 2.8.17

HSD Memo: Implementation of the Qualis Health Provider Portal "Jiva System"

HSD Memo: Qualis Health Provider Portal Requirement for Level of Care Requests and Prior Authorization Requests

HSD Memo: Closure of Terminated Supplemental Security Income Medicaid Extensions

FAQ of Frequently Asked Questions by Case Manager from DHI – Draft

Letter: Notice of Right to Appeal

Follow up Instructions for the Agency Directors Meeting on July 26 2017