

**Agenda**  
**Statewide Case Management Director's Meeting**  
**July 26, 2018**  
**10:00 am to 2:00pm**  
**CDD rm 103 E**  
**Short Lunch Break /Working Brown Bag Lunch**

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

**10:15 – 11:30 Valerie Valdez QMB Overview of new Survey tools /Q&A**

- Valerie Valdez QMB Bureau Chief highlighted new aspects of survey tool.
- Aug 16 is a Steering Committee meeting (DDSD- QMB) to review first quarter's worth of data from new surveys.
- Agencies will not be cited when they are able to demonstrate due diligence in addressing an issue with providers, e.g., two attempts to request information from a provider and use of a RORA. Concerns with the burden of filing a RORA were discussed and will be revisited.
- If you have considerations for this meeting, provide comments to Christina Hill and Valerie Valdez by August 3.

**11:30-12:00 Kim Scott Qualis /Jolene Mondragon HSD**

Discussion about LOC Notifications in JIVA. HSD and DDSD will review the following points raised by Directors in the meeting:

1. Request that the 45-day reminder notice say, "Final Reminder Notice" vs. "Final Notice" to better represent the purpose of the letter.
2. Reconsider language in the letter that is written in second person ("you") so that it does not inadvertently assign more duties to the recipient of the letter than necessary.
3. Consider Qualis' suggestion to send reports of episodes by agency versus making a courtesy call to individual case managers. This is in order to relieve the burden on Case managers of searching for an episode opened by Qualis in agencies with hundreds of clients
4. What more can DDSD/HSD do to assist case managers with physicians who do not respond timely Case manager requests to complete LOC documents, e.g., can HSD provide a letter to case managers to attach to the request to emphasize the importance?

**12:00 -12:15 Break (remember Brown bag lunch)**

**12:15 -12:45 Carrie Roberts and Casey Stone Romero, Community Inclusion**

- Complete the attached DVR Referral Form, please note that this is a Supported Employment case and any other pertinent information, i.e. Jackson Class Member, DD Waiver, Mi Via.

- Return the completed Referral Form to the Area Supported Employment Liaison (see attached list) or the nearest DVR Office. Contact information for each office can be found at <http://www.dvr.state.nm.us/locations-contact-us.aspx>
- Please remember to bring a copy of the ISP and a copy of a Social Security Award Letter to the individual's Initial Interview with DVR.
- At employment placement, the case manager should help the individual begin planning for transition back to DD Waiver Job Maintenance services by choosing a Long-Term Job Maintenance Provider through the Secondary Freedom of Choice (SFOC) process.
- Once a Long-Term Job Maintenance Provider is chosen, a case manager can request that Job Maintenance be added to the individual's budget with Employment Verification, through the OR. Upon approval of the individual's budget the Long-Term Job Maintenance provider will need to provide a Letter of Long Term Support to the individual's DVR Counselor.
- After 90 days of successful employment the individual's case will be Closed-Rehabilitated.
- If an individual requires additional supports related to employment after his/her case is Closed-Rehabilitated, he/she has the option to contact DVR for Post-Employment Services or for a new case to be opened if intensive services are required.
- Supported Employment Helpful Resources 7.2018
  - ✓ DVR Website- [www.dvr.state.nm.us](http://www.dvr.state.nm.us)
  - ✓ DVR Office Locations/Contacts- <http://www.dvr.state.nm.us/locations-contact-us.aspx>
  - ✓ DVR Services Explained Video- <https://www.youtube.com/watch?v=CFCZJ7teNGs&feature=youtu.be>
  - ✓ DDSD Regional Office Contacts- <https://nmhealth.org/about/ddsd/region/>
  - ✓ DDSD Supported Employment Website- <https://nmhealth.org/about/ddsd/pgsv/cmin/spe/>

#### **12:45 – 1:45 Monthly Site Visit Form and use of Therap (Christina Hill DD Waiver and BSI Chris Futey)**

- In collaboration with Therap, DDSD will be issuing a troubleshooting guide. The Draft was reviewed today. Provide any information, questions, concerns about: *Troubleshooting Tips for DD Waiver Case Managers Using Therap* to Chris Futey and Christina Hill by August 3, 2018.
- DDSD heard questions/concerns about the expected duration of the monthly site visit (1 hour). DDSD will devote more time to discussion of the issue at a later date
- The Site Visit Tool will be piloted in Therap Case Notes. Sign-up sheet was provided. Please contact Christina Hill with any additional case managers who want to be part of the pilot ASAP. Initial training webinar is scheduled for Thursday Aug 2 12-2pm. More details are coming soon.
- Case management agencies are not using Therap Report Library, but rather creating home grown spreadsheets to monitor and track. Putting key words in the report library

search may be useful in bringing up reports. DDSD will also provide future guidance on which reports may be helpful to meet DDSD reporting requirements.

- Case Notes have been turned on for all case management agencies. For case managers to view these for their individual caseloads (or through their supervision profile), Case Notes must be checked in the super role permissions through the agency's Therap admin account.
- Feedback on the Site Visit Tool Project can be emailed to [christina.hill@state.nm.us](mailto:christina.hill@state.nm.us) or provided through participation in the pilot project.
















#### **1:45 -2:00 Announcements and wrap up**

- Sharenm.org is an online resource directory which contains information on a great variety of community resources available in New Mexico. <https://www.sharenm.org/>.
- Case Manager Tip Sheet for Therapy Services (See attached.)
- CORE Submission Reminders (See attached)
- Memo Psychiatric Hospitalization (See attached)
- *Tribal Notification Letter 18-17* for the DDW Amendment to update UDRs and implement a rate adjustment has been released. It can be viewed at the link below including the proposed fee schedule.

<http://www.hsd.state.nm.us/providers/written-tribal-consultation-letters.aspx>

**Next meeting: October 25, 2018 CDD Rm 103 E**

#### **Attachments:**

-  A. Agenda for CM Agency Director's July...
-  B. CMS Assur - Service Domain w Tag Or...
-  C. Compliance Determination 2018
-  D. QSG-HC-BasedWaiverLOCsubmission...
-  E. DVR - Area Office List - SE Liaions Com...
-  F. DVR GENERAL SERVICES FLIER
-  G. DVR Referral
-  H. Troubleshooting Tips for DD waiver C...
-  I. CM Monitoring Activities and ToolsUp...
-  J. Mock up Questionnaire 15\_Non fillable
-  K. Pilot Monthly Site Visit Form
-  L. Instructions for Case Management Mo...
-  M. Case Manager Tip Sheet and Attache...
-  N. CORE Submission Reminders and Att...
-  O. Psychiatric Hospitalizations Memo