Minutes for Statewide Case Management Director’s Meeting
July 25, 2019
10:00 am to 2:00pm
Bank of The West Building
5301 Central Ave
Albuquerque
17th Floor
Short Lunch Break /Working Brown Bag Lunch

Welcome and Introductions
HSD/ Medical Assistance Division

New Allocations

- Please communicate the with the client, the importance of working with the MCO Care Coordinator if the client is new to Medicaid
- Please communicate with the Care Coordinator if the client has Medicaid and has an established MCO.
  - HSD working on communication to MCO Care Coordinators to work with Case Managers.
  - HSD working to see if MCO Care Coordination Unit to attend next Case Management Director meeting
- If the client is receiving services in a Community Benefit program, please work with the Care Coordinator and establish transition dates as soon as possible. Use the CIU to communicate this date with ISD as soon as this date is established.
- If the client is in an ICF/IID, please work with the facility to establish transition dates. Use the CIU to communicate this date with ISD as soon as this date is established.

LOC

- HSD is working on revising the LOC Abstract (MD 378) to update and simplify the form
  - Clarification: looking for feedback on the full LOC process including forms used. Any feedback for the MAD 378 form itself can be sent directly to Annabelle Martinez.
  - Case Managers should assure some CIA’s are being submitted without cut and paste from other client data
  - Please send any draft changes or suggestions to the LOC form to Martinez, Annabelle, HSD AnnabelleM.Martinez@state.nm.us by COB 08/15/19.

TPA- Comagine

- The TPA will be conducting two (2) Jiva Refresher trainings for interested Case Management Agencies (one in the morning and one in the afternoon) via WebEx. The training will focus on how DDW Case Managers can use Jiva, such as locating the
established LOC episode, submitting questions to the TPA, locating LOC reminder letters, explain why episodes are voided and where to find the replacement episode, how to print documents from the Documents tab, and how to distinguish when an episode is opened/closed. Tentative training date will be in September. Look for an email invitation and updates on Comagine splash page.

- Reminder: For budgets that are submitted to the Outside Reviewer (OR) which result in a RFI by the TPA, the OR must respond to the RFI, not CM’s directly. Responses received by the CM’s directly will not be acted on, and CM’s will be redirected to work with the OR to resolve the RFI.
- For guidance completing budget worksheets CM’s should contact the designated DOH Regional Coordinators. The TPA is unable to provide guidance on how to complete a budget worksheet or advise case managers regarding units.
- For new allocations, the TPA will create the Jiva LOC episode once the TPA receives the PFOC from DOH. In order for the TPA to complete the episode creation, the TPA must enter a LOC date. The TPA will enter the date from the allocation letter to create the episode, however, when the LOC is reviewed and decisioned, the TPA will change the LOC start date to the date the TPA completed the review. The LOC start date should be the date the TPA completed the review for new allocations, not the date of the allocation letter. If CM’s have questions regarding the LOC start dates on a “closed” or “decisioned” episode, please call the TPA directly. Notes left in closed episodes will not create an alert for the TPA.
- The TPA will no longer create LOC episodes a year prior to LOC expiration dates. CM’s will find that this new process is easier to locate LOC episodes. The TPA is utilizing the 1915c Client Tracking List to identify expiring LOC’s.

Bureau of Behavioral Supports (see attached Memorandum dated July 17, 2019)

- Funding for Staffing of DD Waiver Participants during Hospital or Nursing Home Admission

Annual Training Discussion

- The DD Waiver Service Standards currently require an annual Abuse Neglect and Exploitation (ANE) refresher course. Other areas where the case management system would benefit from increased competency in progressive practices include: health care for people with IDD and person-centered planning, assessment, linking, monitoring, and DD Waiver standards.
- It was discussed the possibility of requiring annual training for case management system.
- DDSD will continue to discuss the possibility of an annual training requirements.
- Please send any suggestions to Leah Manning at Leah.Manning@state.nm.us by COB August 16, 2019.

Dual Caseload for DD Waiver and Mi Via Discussion

- Person Centered Process. An individual may benefit from changing waivers while maintaining the same case manager/consultant across the lifespan.
• It was discussed the possibility of considering dual caseload for case managers and consultants.
• DDSD will continue to discuss the possibility of dual caseloads.
• Please send any suggestions to Leah Manning at Leah.Manning@state.nm.us by COB August 16, 2019.

12:00-12:20 Break - Working Brown Bag Lunch

Updates and Check-ins (DDSD)

Community Inclusion (see attached Strike Force Document)

• We are working on a pilot document to cover the Work, Education and/or Volunteer History Section of the ISP, to use with JCMs to provide a more accurate reflection of the information we are asking you to document
• We want to ask questions that are relevant to the PCA and the DD Waiver Standards and to help CM’s succeed with a form that is more in-line with our current system requirements
• We will be looking for quality, narrative documentation and descriptions to meet the DD Waiver standards
• The Community Inclusion and Case Management Coordinators will be in touch with more information. This will be a quick turnaround—expect to hear from us very soon.
• Beginning for ISPs with October start dates the Work, Education and/or Volunteer History Section of the ISP will likely be blank and we will begin piloting the ISP Employment Addendum.

DD Waiver Renewal

• See attached high level timeline. Any thoughts about DD Waiver Renewal can be emailed to Christina Hill and Leah Manning.
• Melinda Broussard and Lecie McNees are the CM representatives for the ACQ Steering Committee. Future Task force/Focus Groups will be scheduled, and others are welcome outside of the Steering Committee. More Information to come

Site Visit Tool for Statewide Data

• See attached quarterly report on aggregated data from Site Visits. Review with case managers and provide any feedback about systemic recommendations to Leah Manning an Christina by email by 8/30/2019.
• DDSD will continue with quarterly reports and work internally and with CM Directors to determine QI initiatives as relevant

Provider Application

• A new provider application and review process has been developed.
• “soft implementation” beginning now. 15 provider agencies including one CM agency were training this week on the new application and review process
• Modifications may be made in the beginning stages of implementation
• PEU- Tammy Barth will continue to send communication and the application when agency renewal is due.
• The new application will be posted Aug 1st but due to potential changes during beginning stages of implementation please do not complete an application unless you have been contacted by Tammy Barth

Rate Study
• Final report posted on website
• Financial impact part of contractor’s work
• Rate increases are supported by DOH/HSD but will need an amendment to approved waiver and funding to implement
• Plans in place for FY 20 exact implementation date to be determined

JCM Settlement Agreement-
Paragraph 11
• Lists generated by DDSD- Bureau of Systems Improvement using GER data, eCHAT and Aspiration Risk data and definitions in the settlement agreement. DDSD is responsible for identifying JCMs needing review
• Regional CM Coordinators have started agency visit sand working with the tool
• See attached for summary of CM suggestion made to the tool draft and DDSD responses
• Problems with implementation can be brought to RO office and modifications may be made as we go if inadvertent issue arise
• LCA Letters have gone out from RO’s
• Call Reginal office with questions
• Face to face IDT meetings may not be needed depending on circumstances but discussion and documentation of such is needed

Therap Case Notes

Link: https://help.therapservices.net/app/new-mexico
• In checking for those case notes:
  Be sure your search parameters are correct i.e. dates, have the provider administrator use the activity tracking section, and put in the user’s name and then a date range of when they thought the note was added into Therap. (can only search for 30 days at a time) It’s hard to research the issue without a date.
  • Use Live Chat when issues surface it is much easier to research
  • At least 5 other states use Case notes and no systematic issues (except that location in where the internet access was cut off).
  • NM is the only state with this issue. (Therap works with multiple states and large systems without this issue)
  • In May at the issues, it seemed like the root cause was saving the questionnaire, then not saving the case note itself.
• August 1 – Join Therap Webinar from Therap Help and Support page Deb Hibbard and Therap CEO will be available to answer questions
• PHI research issue must be sent separately – please Scomm and include date, name

Therap Report Library
• From Agency Admin account look for NM specific reports (see attached handout)
• Data is agency specific and does not contain other agency data – be sure IDF’s are correct

QMB Survey Process expectations
• Updated CM survey tool went into effect on July 1, 2019.
• Changes to survey process:
  o QMB will use the approved provider agreement as a means to review P&P, as well as other admin requirements. If the providers has recently revised or renewed agreement, please just make sure that that team is aware of any changes.
  o When reviewing the semi-annual reports from LCA and CI providers will be looking at not just if they are there, but if progress documented. If no progress is documented, is there evidence the CM followed – up with the provider or request a new one? Can be documented in monthly notes or where CM feels it appropriate just make sure to info QMB survey team.

• Review cycle is now based on the agency’s compliance determination (6 months – 36 months).
  o Non-Compliance (6 – 12 months)
  o Partial Compliance with Standard and Condition of Participation Level Standards (12 – 24 months)
  o Compliance (24 – 36 months)

1:30-1:50 IMB
• IDT meetings after substantiated findings of ANE.
  With the hiring of approximately 15 contract Investigators to help IMB close our backlog of cases, we know that case managers have been inundated with requests for IDT meeting minutes for substantiated cases. Since many of these cases are old, the Case Manager may have already held an IDT meeting. The minutes from those meetings is acceptable as long as all of the issues identified in the substantiated finding were addressed. In addition, since the sole purpose of the IDT meeting is to determine if the consumer’s ISP needs to be updated, the CM may hold a telephone meeting or a meeting by email to ensure all of the team members were notified of the substantiated finding and that no changes to the ISP need to be made.

• Provider notification of ANE and sending of the IASP.
  The NMAC requires the Responsible Provider to notify the Case Manager and the Guardian within 24-hours that an ANE report was made to DHI. In addition, the 2018 DD
Waiver standards require the Responsible Provider to supply the Case Manager with the Immediate Action and Safety Plan. IMB has been attending the Quarterly DDSD-Provider meetings to remind Providers of their responsibility. But we know many Case Managers are still not being notified and/or provided with the IASP. If you find a Provider has not notified you of an ANE report or you don’t receive the IASP, please call or email IMB Chief Ed Stallard, so he can follow up with the Provider and remind them of their responsibility. Ed’s contact information is: (505) 259-4314 or edward.stallard@state.nm.us.

Friendly reminder please contact Leah Manning at Leah.Manning@state.nm.us if you have any questions or concerns.

2019 Meeting Schedule 10am-2pm Bank of the West
Next Meeting:
October 24, 2019

- Annual Training for CM 6-28-19 (*)
- CC 2.0 MCO Care Coordination Contacts...
- CM Input 11c tool
- CORE
- DDW Renewal
- Dual Caseloads for CM Directors
- Memo 7-17-19
- New Reports In Therap
- GTR Statewide Case Note Report
- Strikeforce ISP_PCA review form 6.28.19