

**Statewide Case Management Director's Quarterly Meeting Minutes
10-20-22**

Speaker/Topic	Notes
10:00-10:05: Introductions	<p>Welcome to new staff members CPB: Anthony Bonarrigo -DDW Program Coordinator HSD: Dominic Jaramillo-Staff Manager</p>
10:05-10:15: HSD Updates/Reminders	<p>HSD: Community benefits are ending before DD Waiver budget begins. There has been confusion switching programs. This can happen during eligibility process. HSD will provide follow-up with more information about when to provide updates with the CIU. In the meantime, Please see DDW Existing Allocation Table at this link: Case Management (nmhealth.org)</p> <p>TPA:</p> <ul style="list-style-type: none"> • CM's must submit a close out budget when recipients are transitioning out of the DDW and into a different waiver <ul style="list-style-type: none"> ○ If CM's do not submit a close out budget, the recipient cannot start services under the new waiver ○ In most cases the RFI will be issued to the Outside Reviewer (OR) and the OR must respond to the RFI <ul style="list-style-type: none"> ▪ Responses received directly from the CM will not be accepted unless the RFI is for a JCM or child budget that was submitted directly to the TPA • New Allocation LOC packet submissions <ul style="list-style-type: none"> ○ Ensure that packets are complete and submitted timely to the TPA ○ The TPA will beginning issuing Request for Information (RFIs) sixty-nine (69) days after the TPA has received the PFOC ○ TPA will begin issuing Technical Denials for episodes that have exhausted the RFI process <ul style="list-style-type: none"> ▪ A technical denial will be communicated with the ISD office so that the application can be closed ○ If CM's are made aware that the allocant would like to place their allocation on hold, please work with DOH's Intake and Eligibility Bureau so that the update can be sent to the TPA and ISD. • Waiver Transitions <ul style="list-style-type: none"> ○ If a LOC has been submitted to the TPA and is in process of being reviewed, the allocant must wait until the LOC has been reviewed prior to transitioning to a different waiver <ul style="list-style-type: none"> ▪ A Waiver Change Form must be received from DOH's Intake and Eligibility Bureau for the TPA to make the waiver change.
10:15-10:30: DDU Presentation	<p>Vanessa Mathew from MAD provided information on the Disability Determination Unit (DDU) Please see attached PowerPoint from presentation. There are only 4 pending cases. DDU is current with reviews. Contact Information: Vanessa Mathew (DDU Contract Manager)- (505) 709-5654 VanessaJ.Mathews@state.nm.us. Joseph Duran (DDU Operations Coordinator)- (505) 709-5569 Joseph.Duran2@state.nm.us.</p>

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<p>10:30-12:00: Guardianship Presentation</p>	<p>Ingrid Nelson, Program Operations Director Continuum of Care/UNM—Please see attached Power Point and accompanying documents from presentation. **This presentation can be used towards 14 hours of training Contact Information: IMNelson@salud.unm.edu</p>
<p>12:00-12:15: Lunch</p>	
<p>12:15-12:30: Clinical Services Bureau (CSB)Updates</p>	<ol style="list-style-type: none"> 1. SARL: Please contact Betsy Finley for any issues. 2. Adding therapists to the IDT: If the IDT has expressed a need for an additional therapist, there is no need to get a referral or see a therapist through insurance before asking for a therapist through DDW. Outpatient or Home Health can be accessed for acute medical needs, in addition to DDW therapy services. 3. Therapies when an individual is in the hospital/inpatient/rehab: Per Standards 12.4, DDW therapy services may not be provided concurrently with inpatient Medicaid services (p. 166). It is critical that a post hospitalization IDT meeting be completed after the person has been discharged. 4. Safety Net Therapy Services – CM role: <ul style="list-style-type: none"> • CM is the primary contact between the CSB Consultant and the IDT. Please notify CSB consultant of any upcoming IDTs, any significant changes in the individual's life that might affect therapy consultation services and share meeting notes. • Please let the CSB Consultant and Felicia Vidro know right away when an SFOC is signed. • Please use SCOMM for all communication with CSB Consultants to ensure HIPAA compliance. <p>Let Felicia Vidro know if you do not get a response from a therapy agency Demarre Sanchez-SLP Therapy Consultant: demarre.sanchez@doh.nm.gov or 505-417-5264 Robin Leinwand-OT Therapy Consultant: robin.leinwand@doh.nm.gov or 505-139-1768 Marybeth Schubauer-PT Therapy Consultant: marybeth.schubauer@doh.nm.gov or 505-232-5727 Felicia Vidro- Social/Community Services Coordinator Supervisor: felicia.vidro@doh.nm.gov or 505-841-5878</p>
<p>12:30-1:00: IEB Updates</p>	<p>Updates on Super Allocation: Provided updates on Super Allocation. Next allocation group of letters will be sent out sometime the end of November 2022 Updates on ARF Allocation reporting form (ARF):</p> <ul style="list-style-type: none"> • Don't have to be sent out mid-month. Send out for updates with approval dates or budgets. If nothing to report, it doesn't have to be sent anymore • Reporting may take place multiple times a month if multiple forms are updated. • Reach out to Renee through SCOMM for any PFOC missed

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	<p>Nicole Hernandez: Nicole.hernandez3@doh.nm.gov 575-372-8017 Renee Valerio: renee.valerio@doh.nm.gov 505-372-8024</p>
<p>1:00-1:15: Project on Individuals Wanting to be Employed:</p>	<p>Supported Employment: Regional Office CIC Coordinators will be reaching out if cm submitted on site visit notes with "yes answers" for individuals who would like to work.</p> <ul style="list-style-type: none"> • CIC Coordinators want to make sure the answer is accurate. • List of 436 who said yes between Jan and July this year. <p>Contact Frank with any questions. Frank.Gaona@doh.nm.gov</p>
<p>1:15-1:30: Individual Transition Plan:</p>	<p>Please see attached info sheet for ITP Discussion. DDSD would like feedback from CM system after form has been in use for 3 months. Feedback form to be sent out during the next CM Director Quarterly Meeting. Q- Are E-Signatures allowed? A-Yes. If wet signature is needed, print, and scan it back in or provide signature during meeting Q-Should you use this form for any transition? Can it accommodate extensive and simple transitions? A-Yes. Document is all inclusive Selina Leyba, Waiver Project Coordinator: selinat.leyba@doh.nm.gov 505-372-9624</p>
<p>1:30-2:00: CPB DDW Initiatives and Updates Presenter: Marie Velasco, DDW Program Manager</p>	<p>Statewide Team CM Lead position is still vacant. RFI's: DDSD is trying to support decrease in RFI's. It is not just a case management issue. Teams need to collaborate. Please use the RORA so that TA can be provided to providers. DDSD appreciates the hard work of our CM's. If a CM director would like data specific to their agency for RFI's please contact Marie or your RO. CPB Two Goals: 1) Simplification: Not any major changes but looking at the system to see where processes can be simplified. Taking a thoughtful approach. Q: What can we do about get documents into one place? A: There has been some suggestions about one location in Therap or cm's and providers to access so that there is less paper chasing for cm's. 2) Updating Children's forms and processes as they have not been reviewed in a long time.</p> <ul style="list-style-type: none"> • DDSD is looking at children's' forms or processes. Any ideas for changes please email Marie • Start sending ideas and forms that should be changed to Marie. Let Marie know if any Director or Case Manager would like to provide input. • Suggestion for task force was made <p>Budget submission training 10-25-22 & 10-27-22: New Case managers and those who want a refresher are encouraged to register. You must register to attend DDSD is working on a new rate study Exec committee looking for members RPST: Many individuals purchase items through vendor and a subscription through the vendor may include maintenance of the device, payment for data plans, etc. However, what about individuals who may purchase an RPST or need an App to support the RPST and a data plan is needed? Data plans can be paid for under a subscription if</p>

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an individual purchases a RPST Device off the shelf and the technology requires a data plan. There are some caveats for approval:

- There must be justification of cost
- Must verify it is just for that device and is needed for device to work
- Payment must only be for support tech
- Contact Marie for any issues that may arise when budget submitted to OR.
- DDS D anticipates more tech vendors with services specifically for people with IDD to support independence.

Comments/Questions:

Issues with Therap/SCOMM – Email Christina Hill with specifics

CM Directors would like more time to be able to discuss issues or concerns. Look at changing meeting format. Have this section be in the morning and provide ample time for open discussion.

Response: Marie will look at changing format of meeting.

CM Directors would like for there to be representation from DDS D at CMAAC meetings.

Answer: Please feel free to invite Marie Velasco and Christina Hill.

Concern from CM Directors that regions are operating differently, cm's are feeling overwhelmed. Seems regions are not following standards.

Response: The standards are the standards. DDS D will work internally to be more consistent across the board. If something is different it should be in a numbered memo

CM Directors would like to have input on agenda items for meeting.

Response: Marie will send out a request for agenda items prior to the next meeting.

Meeting Schedule Case Management Directors for 2023

•Thursday, January 19, 2023 @ 10:00 AM to TBD

•Thursday, April 20, 2023 @ 10:00 AM to TBD

•Thursday, July 20, 2023 @ 10:00 AM to TBD

•Thursday, October 19, 2023 @ 10:00 AM to TBD