

A Resource Guide for Independent Case Managers for the Developmental Disabilities Waiver



Developed by:

**The New Mexico
Department of Health
Developmental Disabilities Supports Division**

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Table of Contents

Section	Page
Acknowledgements	2
Table of Contents	3
Use of this Guide	9
Chapter V: Community Resources & Supports	118
Community Resources & Supports	119
Networking	119
Natural Supports	120
Generic Supports	124

Use of this Guide



A Resource Guide for Independent Case Managers for the Developmental Disabilities (DD) Waiver was designed as a resource for New Mexico independent case managers (CM) who serve individuals with developmental disabilities. It serves as a ready-reference to information, resources, and tools you can use to enhance individuals' experiences with the service system and, most importantly, to support attainment of outcomes they personally seek to achieve.

This guide is structured in such a manner as to represent key aspects of the CM's role in his/her relationships with individuals and their families, guardians, advocates, all types of service providers, and others involved in the individual's life. Each chapter addresses a different process that the CM and team assist individuals to complete to secure and receive services and supports that are personally important to their health, safety, and growth as human beings. All chapters describe the rationale(s) for the activities described, the necessary procedures to complete them, and references to relevant policies and/or Regulations.

The guide is comprised of an **Introduction**, nine (9) **Chapters** and an **Appendix**.

Chapter	Title
I	How Individuals Become Eligible for Developmental Disabilities Waiver Services
II	Getting to Know the Individual
III	Making the Most of Meetings
IV	Planning with the Individual
V	Community Resources and Supports
VI	Keeping Things on Track
VII	Record Keeping on Behalf of the Individual
VIII	Creating the Individual's Budget & Billing for Services
IX	When an Individual Changes Services

The guide illustrates the role and responsibilities of CMs with the use of scenarios commonly encountered by individuals, their CMs and teams. These are real life examples of personal experience in services and supports.

The material in this guide can be used in different ways. The guide in its entirety can be used as a handy 'desk reference' for guidelines, protocols, tips, and samples of forms a CM uses on a regular basis. In addition, sections within chapters can serve to refresh knowledge and skills of a particular case management function, particularly those that address situations that arise only on occasion.

This guide can also be made available to colleagues, especially provider agency service coordinators, as well as other team members who play different roles in the lives of individuals. It can expand their understanding of CM interactions with and on behalf of individuals served.

Note: *To review regulatory citations, refer to the hyperlink entered by each reference.*

Chapter V

Community Resources & Supports



- ◆ Community Resources & Supports
- ◆ Networking
- ◆ Natural Supports
- ◆ Generic Supports

Community Resources & Supports

Individuals should have the opportunity to participate in their community and culture, as we all do, **without regard to abilities or limitations**. Team members must come to know the individual's values, beliefs, goals, cognitive and physical abilities, and resources.

The team should brainstorm ways to identify and include activities that utilize natural or generic resources that support an individual's friendships, needs and quality of life, and *may also reduce his/her dependence on the formal services system*.

The case manager's (CM) role is to have familiarity with local community resources so he/she can suggest logical links between the individual's interests and opportunities in the community. If the CM is not aware of a resource that connects to an individual's interest, he/she should ask other team members what ideas they have. The CM, as well as other team members, may need to research new resources if needed.

Networking

It is important for the CM and team members to "network" with a variety of local resources in order to link the individual with natural and generic supports within his/her community.

- ◆ The team should first try to identify and arrange natural and generic supports within the community.
- ◆ The team should always ask what natural and/or generic supports the person already has available to him; the CM should be sure these are integrated into the Individual Service Plan (ISP).

- ◆ Assist the individual and family in using neighborhood and community supports, services and resources as the primary means of meeting the individual's needs and preferences as identified in the action plans of the ISP.
- ◆ Recruit and involve community members, associations, family, neighbors, co-workers, support groups and other interested persons (i.e. the waitress at the coffee shop) to increase community connections and inclusion.

Natural Supports

Natural supports are defined as personal relationships and associations developed through an individual's natural environment or community. These supports or individual associations enhance and sustain a person's life, helping them feel included and secure in his/her chosen roles in the community. **Natural supports are people in an individual's life** that are neighbors, fellow employees, family, associations developed through mutual interests and hobbies, community clubs, organizations and civic activities. Natural supports come from diverse populations that reflect a wide range of cultures, neighborhoods and communities. Relationships with these people are natural supports.

As in any relationship, natural supports change through the years. As we grow and our interests expand, some relationships fall away and others are nurtured. These relationships are reciprocal in nature; there is no one method to develop these relationships or supports. Each natural support will be unique as to what it has to offer and how it is developed.*

*"Friendships and relationships are at the core of ongoing personal satisfaction...Activities by themselves are usually not as rewarding or fulfilling...when you do plan for community activities/outings/events, design them with a purpose—so that connections can happen". ***

Susan is a 25-year-old Hispanic woman who lives in her own apartment and receives assisted living services through the DD Waiver. Susan has worked at a local nursery for two years. Her co-workers and customers value her willingness and dedication to helping others. Susan has obtained a driver's license and has her own car. Susan expressed to her team that she wants to be more independent in getting to and from work on her own. She told them that she was having car trouble and needed help to get it fixed. Susan did state that she wanted to start saving some of her earnings from work to get the car fixed. Susan voiced concern about not being able to get to work if her transportation wasn't dependable. Susan stated that her job was very important to her and she did not want to lose it.

The team suggested that Susan make a list of close friends, co-workers, and family members she could contact to help her if she was having trouble getting to work. Susan contacted those people she thought could give her a ride to work and made arrangements with them in case her car was not available. The team also assisted Susan in obtaining a bus pass and a bus schedule in case she needs to take the bus to work. Susan put the phone list and bus schedule on her refrigerator where she could find it whenever she needed alternate transportation. Car trouble was no longer a source of anxiety for Susan and she felt confident that it would not interfere with the job she valued.

Remember: *Relationships are reciprocal.* The CM should help identify what the person can give back to the relationship (i.e., baking cookies with a staff person for a club meeting or church group). “Assist a person to do a community activity and he will do a community activity. Assist a person to build a friendship and he will have a friend and they will probably spend lots of time in the community doing a variety of community activities.”** The CM and team should brainstorm these ideas and integrate them into the steps of action plans so that direct support staff can implement them consistently and successfully.

Natural supports can help the person with some of the following activities they might choose to do:

- ◆ *Researching, accessing and learning to use* Public Transportation
- ◆ *Participating* in Civic groups
- ◆ *Getting to know* Neighbors
- ◆ *Using* Public Libraries
- ◆ *Attending* Churches & religious organizations
- ◆ *Joining* Volunteer organizations
- ◆ *Helping* with medical or other appointments.

*Morgan is 37 and lives with two other men. Morgan LOVES to eat out at a particular Italian place. He can afford to do it 2-3 times a week. The challenge was that others in the home HATED Italian food. No problem. The weekend staff had a friend who LOVES Italian. He introduced him to Morgan. The two hit it off and 'did Italian', not just every weekend but also once or twice during the week. The staff person moved on to another job after a couple years. Morgan and the staff person's friend kept 'doing Italian'...until that friend also moved on. The staff Morgan had then seemed not to have the time to help him find a new way to eat Italian. The plan was dropped and not picked up again. About two weeks later Morgan began picking fights with one of the other guys in the house. He had never done that before. No one had a clue as to why. Six weeks later Morgan was taken to a psychiatrist who prescribed a medication designed to reduce Morgan's aggressive behavior. ** This outcome might have been avoided if a team meeting was called to discuss the issues and "discovered" the Italian meal was dropped. The team could then develop strategies to restore this desired activity to Morgan's life.*

An excellent strategy for helping people find places to belong in their communities is a team meeting for the sole purpose of identifying and setting up natural supports. At this meeting the CM can:

- ◆ With the team and person, identify his/her strengths and abilities as well as the things he/she would be interested in doing.

- ◆ Help the person create a “community road map” which identifies the things he/she can walk to, will need to take a bus to or will need to take a car to.
- ◆ Help the person create a relationship map of his/her various friends and family members and people he/she knows and likes. This will be a foundation for expanding relationships.
- ◆ Invite someone from the community who is very well connected, *a true community networker!* This might be a person who belongs to a civic group, neighborhood association, church or volunteer organization. Ask them for ideas on how to connect the person to the interests he/she may have. They surely will know the right person to call. The CM may need to coordinate with the individual and/or the staff to identify these new team members.
- ◆ If the person is not able to communicate well, the CM might sit with the individual (perhaps before this meeting) and look at magazine pictures together and talk about things the person may like to do. Often a person will react more clearly to pictures, showing likes or dislikes, which can then begin the process of identifying something the person may like to do or participate in.**

Importance of Natural Supports

The importance of natural supports being in place is highlighted when family members are no longer able to assist with informal respite, recreation, errands and appointments due to some change in their life circumstances. A natural support system involving non-relatives could help with running errands, picking up groceries, visiting, or even dropping off a meal. However, help from friends and neighbors vary widely by individual family and cultural groups. Some families may actively seek help from churches, social, and service organizations. Other families do not seek or accept help from such resources. Keep in mind that not all caregivers and their families provide care in the same way. The CM can expect to see some differences in caring style by gender, cultural group and age. Do not assume

that all women, men, older people, or families of a specific cultural heritage, will hold similar attitudes about the caring role, disability, social activities and the use of community services.*

Generic Supports

Generic Supports are generally known and available to the public. Generic supports are any support that can be purchased or arranged for by any individual or family in the community.

An individual needs to be prepared to pay for these services on his/her own or an agency can assist in arranging to pay for the support in the community. Generic Supports are community supports that are not usually paid for through the Waiver.

These include but are not limited to:

1. Dr. Appointments
2. Mental Health Facilities
3. Health clubs
4. A taxi or bus pass
5. Division of Vocational Rehabilitation
6. Department of Labor
7. Psychologist/Psychiatrist
8. Joining an association for some sport or hobby
9. Tax filing assistance
10. Food bank

Examples of Generic Supports

- ◆ *How can an individual obtain treatment for depression? The team needs to identify local resources (Mental Health Facilities, Hospitals, etc.) to*

determine if the individual qualifies for outpatient behavioral health services. Then the team may need to identify a source to fund this service. Many civic clubs will donate money for specific services or purchases for people with disabilities who cannot afford the services themselves.

◆ *Emma lives in Ireland and loves bird watching. She often goes on long walks by herself and comes back home with stories of the birds she has seen, their names, colors and habits. She also loves to draw pictures of the birds she knows. Emma does not like to be called "disabled" and would really like to have non-disabled friends to spend time with. One of the staff in her home finally called the RSPB (Royal Society for the Protection of Birds) and asked if she could attend their monthly bird watching outing. Emma was warmly invited to join the outing and a staff went along with her to help her make friends with the other members. Emma came home very happy to at last have some friends who didn't see her as a person with a disability, but as a person who loves birds. She was also able to help identify some of the birds they saw and share her knowledge with the other members. The local RSPB had quarterly meetings with speakers and they charged \$5.00 for participants. Emma had to save enough of her own spending money to pay for the meetings. The staff that went with Emma paid their way from the house budget. Interestingly, paying her own way was very important to Emma and a source of pride that she could do that.*

* **How to Develop Natural Supports: A Quick Look**, based, in part, on The Lanterman Developmental Disabilities Services Act, Section 4512 of the California Welfare and Institutions Code, Part (e).

****Doing It Right, A "How to" Guide for Independent Support Coordinators**, developed for the State of Tennessee Division of Mental Retardation Services, Rucker, Powell and Associates, 2000.