

**Statewide Case Management Director’s Quarterly Meeting Agenda
01/18/2024**

Speaker/Topic	Notes
10:00-10:05: Introductions	<p>DDSD- Selina Leyba, Marie Velasco, Evangeline Yanez, Christina Hill, Cara Latil, Peter Michaels, Renee Valerio, Brani Rede, Tiffany Morris, Guy Irish, Angie Brooks, Alecia Pulu, Mary “Nettie” DeBerry, Frank Gaona</p> <p>HSD- Dominic Jaramillo</p> <p>Comagine Health- Kimberley Scott, Lisa Feeley</p> <p>Case Management Directors- Melinda Broussard, Loriessa Randle, Kimberly Hawkins, Dawnmarie Martinez, Sarah Herrington, Kristin Martin, Sarah Martinez, Daniel Romero, Carrie Lyon, Natasha Rakoff Ruiz, Carlos Hernandez, Jacque Pulling, Scott Newland, Charles Clayton, Louann Cruz</p>
Review of Agenda and Accomplishments 10:05-10:10	<p>Developmental Disabilities Supports Division appreciates all feedback provided by Case Managers and we look forward to more innovative ideas from you.</p>
HSD Updates 10:10-10:25	<p>“Well Child Visit” Versus History and Physical (H&P)</p> <ul style="list-style-type: none"> - If a “Well Child Visit” is submitted as part of the Level of Care, it must include a review of systems which is required as part of the H&P. <p>Category of Eligibility Issues:</p> <ul style="list-style-type: none"> - Income Support Division (ISD) currently has a backlog and is asking for patience during this time. Please feel free to reach out to ISD directly for any updates. - ISD has hired additional staff to help process these applications. - Case Managers, please continue to send information on individuals that are having issues with their COEs. Please send the following information via SCOMM: <ul style="list-style-type: none"> o Individual’s Name o Date of Birth o Medicaid ID or Social Security

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	<ul style="list-style-type: none">○ Regional office○ Case Manager <ul style="list-style-type: none">- HSD is working on a frequently asked questions document that will be released to Case Management Agencies. <p>Reminder- when assisting individuals completing HSD 100 be sure to write ICW on front page of the document before sending to ISD.</p>
<p>Comagine Health- Kimberley Scott 10:25-10:45</p> <ul style="list-style-type: none">- Jiva Question and Answer Session	<p>Kimberley Scott attended the meeting to dedicate some time to answer any questions case managers have on Jiva submissions.</p> <p>To upload multiple documents, case managers have two different options:</p> <ul style="list-style-type: none">- Option 1: After creating the episode and uploading the first four documents, the case manager will go to the dashboard and use the memory list to access the episode list. Once the episode is accessed the case manager can upload any additional documents.- Option 2: After creating the episode, the CM can attach a zip file that holds all the documents required for budget submission. <p>Case managers have noticed that on some of the episodes they are not seeing the attach button to add documents.</p> <ul style="list-style-type: none">- Case managers must add the case management agency as the requesting agency. If this does not resolve the issue, please call Comagine Health at 866-962-2180. <p>Reminder- Coversheets are not required when submitting to Comagine Health.</p> <p>Quickstart guide can be found on the Comagine health website: https://comagine.org/program/new-mexico-medicaid/providers</p>

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<p>Intake and Eligibility Bureau 10:45-11:00</p> <ul style="list-style-type: none">- Allocation Reporting Forms- Supper Allocation Update	<p>Allocation Reporting Form:</p> <ul style="list-style-type: none">- The Allocation Reporting Form (ARF) has been updated (Form Attached).- Changes include:<ul style="list-style-type: none">o The ISP/SSP and budget approval dates have been combined.o The budget amount has been eliminated.- Reminder: ARFs need to be sent to the assigned Eligibility Worker when there is new information regarding the individual's DD/MV waiver allocation. It is critical that IEB receive the ARF timely, especially when an individual has been approved to start receiving services, so IEB can transfer the file to the appropriate regional office. <p>Allocation Update</p> <ul style="list-style-type: none">- See attached for allocation update
<p>Clinical Services Bureau 11:00-11:15</p> <ul style="list-style-type: none">- Updated State Aspiration Risk List	<p>Reminder:</p> <ul style="list-style-type: none">- Document submission of information for the State Aspiration Risk List (SARL) are required Annually. <p>New Process:</p> <ul style="list-style-type: none">- Clinical Services Bureau is working on implementing the SARL reporting in Therap.- Having the SARL in Therap will allow nurses and staff to run reports while having easier access and usability.- Implementation date will be announced soon along with training dates.- Information is used to monitor aspiration risk level. Knowledge of data and trends will help ensure individual's health and safety.
<p>DDW Program Updates 11:15-11:35</p> <ul style="list-style-type: none">- Imminent Review Process- DDW Amendments-	<p>Imminent Review Process:</p> <ul style="list-style-type: none">- The revised imminent review process went into effect on 01/01/2024.- The imminent review criteria has not changed but the process for submitting an imminent review has.

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- Guidance document was shared with the case management directors.

Amendment with CMS:

- Includes:
 - o Implement cost-of-living adjustment (COLA) funded through state fiscal year 2024 legislative appropriation.
 - The COLA was evenly distributed to the following services: Behavioral Support Consultation, Case Management, Community Integrated Employment, Customized Community Supports, Customized In-Home Supports, Crisis Supports, Living Supports, Nutritional Counseling, Preliminary Risk Screening and Consultation Related to Inappropriate Sexual Behavior, Adult Nursing, Respite, Socialization and Sexuality Education, Supplemental Dental, and Therapy Services.
 - o Legally Responsible Individual (LRI):
 - Amendment language: effective March 1, 2024, to support the provider network and service delivery, specify that a legally responsible person (LRI), relative, or legal guardian may provide Community Integrated Employment, Customized Community Supports, Customized In-Home Supports, and Respite.

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- Definition of LRI:
 - A person who has a duty under state law to care for another person. This category typically includes: the parent (biological, legal, or adoptive) of a minor child, or a guardian who must provide care to an eligible recipient under 18 years of age or the spouse of an eligible recipient.
(8.314.6.7 New Mexico Administrative Code)
- DDSD is working on guidance documents with guardrails for the purpose of supporting individual choice and best interests.
- Once this amendment is approved by CMS, we will submit another amendment to capture the 2023 Public Consulting Group Rate Study recommendations.

Guidance Document and Approval for LRI is being created and will be released prior to effective date of LRI.

Please note as part of the guidance and for some clarification:

- Relative and legal guardian on 03/01/2024 may provide Community Integrated Employment, Customized Community Supports, Customized In-Home Supports, and Respite without restrictions.

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	<ul style="list-style-type: none">- Legally Responsible Individual (LRI) on 03/01/2024 may provide Community Integrated Employment, Customized Community Supports, Customized In-Home Supports, and Respite with restrictions.- Corporate Guardians may not provide CIE, CCS, CIHS, and Respite Services.- DDSD is looking at how other states have implemented LRI's. There is a new technical guide for DD Waiver Application that is also being reviewed for guidance and clarification of the use of LRI. DD Waiver is considering the addition of LRI language in service standards and what circumstances LRI will be allowed in certain services. For example, LRI may not be allowable under SE as CIE is not available to children.
<p>Community Inclusion Bureau 11:35-11:55</p> <ul style="list-style-type: none">- Division of Vocational Rehabilitation (DVR)- Community Integrated Employment	<p>Community Integrated Employment:</p> <ul style="list-style-type: none">- Before accessing CIE services through the DD Waiver, individuals are required to utilize funding for services available through vocational rehabilitation and special education as mandated in federal regulation.- The release of information is mandatory for the process to continue. Please remind clients to have a release of information. The release of information can be found at the following link: Index - Referrals (nm.gov)- Please emphasize that whoever is completing the referral, for the individual, to get a signed release of information.- The Community Inclusion Bureau will work with agencies to ensure that these releases are sent to case managers. <p>As a reminder for individuals receiving Community Integrated Employment, Job Coaching is for short term (usually covered by DVR) and Job Maintenance is for long term.</p> <ul style="list-style-type: none">- Job coaching requires DDSD approval

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	<ul style="list-style-type: none">- Job Maintenance does not require DDSD approval
Technology Task Force 11:55-12:05	<p>The Technology Task Force meets the first Wednesday every month. Case managers can find the meeting information and links on the DOH website at https://www.nmhealth.org/about/ddsd/pgsv/tech/</p> <p>The February 2024 New Mexico Tech First Series Flyer is attached for your reference.</p> <p>Healthgeneics is an Assistive Technology and Remote Personal Support Technology purchasing agents.</p> <p>If you need additional questions or information contact Task Force Members and/or Angie Brooks and Christina Hill. Individual consultation meetings are available.</p> <p>Question: Does the Tech Screening Matrix need to be completed for the budget.</p> <ul style="list-style-type: none">- No, this matrix is a tool for the team to gauge views about implementing technology to help individuals.
Station MD Update 12:05- 12:15	<p>Update:</p> <ul style="list-style-type: none">- Station MD currently has 13 providers and there are 4 that are in process of becoming providers.- Station MD is averaging approximately 160 encounters statewide a month.
Legislative Session 12:15-12:20	<p>Legislative Session</p> <ul style="list-style-type: none">- Begins January 16th at noon- Ends February 15th at noon. <p>DDSD's role in the legislative session is to provide the Legislative Finance Committee staff and legislators unambiguous fact-based analysis of how</p>

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	<p>a piece of legislation will affect our agency and customers. DDSD does not oppose nor support pieces of legislation but rather provides information.</p>
<p>Abuse, Neglect and Exploitation Verification Form and Updated Individual Transition Plan 12:20-12:30</p>	<p>Abuse Neglect and Exploitation Verification Form and Updated Individual Transition Plan</p> <ul style="list-style-type: none">- The Abuse, Neglect, and Exploitation Verification (ANE) Form will be used by Case Mangers to verify with the Division of Health Improvement (DHI) if there are any active ANE cases for the individual prior to a transition of services from one provider to another or between waivers.- This form helps transitioning agencies to have necessary conversations with the receiving agency on any Immediate Action and Safety Plans or other needs to adequately support the individual.- This does not prevent individuals from transitioning but rather helps facilitate conversations.
<p>Outside Reviewer Transition Update 12:30-12:45</p>	<p>OR Transition Update</p> <ul style="list-style-type: none">- Budget submissions are being received by the Third-Party Assessor (TPA) via Jiva.- If Case Managers are having issues with the Jiva system, please try to resolve them through Comagine Health first by contacting them at 1-866-962-2180.- Key Date Reminders:<ul style="list-style-type: none">o 01/01/2024- Annual and Initial budget submissions must be submitted to Comagine Health via Jiva.o 05/15/2024- Last day to submit revisions, on budgets remaining with the OR.o 05/16/2024- All budget submissions will be submitted to Comagine Health via Jiva.

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	<p>DDSD will be sharing a document that outlines required documents that support budget requests.</p> <p>Case Management feedback:</p> <ul style="list-style-type: none">- Requesting additional clarification on how to handle Supported Living submissions. E-CHAT and Positive Behavior Supports Assessment (PBSA).- Selina requested specific examples of individuals that do not have the E-Chat or PBSA requirements to review and provide guidance.
<p>Open Q&A 12:45-1:00</p>	<p>COE issues:</p> <ul style="list-style-type: none">- Can case managers get a designated phone line to the IC Waiver unit at HSD?<ul style="list-style-type: none">o HSD and DDSD have requested this information.o Please continue to contact the Consolidated Customer Service Center at 866-507-1121. <p>Budget Start Dates:</p> <ul style="list-style-type: none">- Do DD Waiver budget start dates need to be the 1st of the month?<ul style="list-style-type: none">o No, Mi Via is the only waiver that requires budgets to start on the 1st of the month. <p>LRI's:</p> <ul style="list-style-type: none">- Do case managers need to submit an exception form for LRI's that are wanting to provide services?<ul style="list-style-type: none">o Yes, case managers can submit exception forms. <p>Client Individual Assessments (CIA):</p> <ul style="list-style-type: none">- The Third-Party Assessor (TPA) has been notifying case managers that the Client Individual Assessment is no longer required as a part of the level of care packet.- Selina confirmed that this is no longer a requirement as part of the Level of Care submission.

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	<ul style="list-style-type: none">- Additional question- will the CIA still need to be required as part of the client file?- DDSD is working on getting information out to the field regarding the CIA. Selina will also get clarification if the CIA is still required to be part of the client file.
Resources:	
Meeting Schedule Case Management Directors for 2024	