

**Date:** September 5, 2023

**DDSD-SW 2023-04**

**DDSD-DDW 2023-07**

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**To:** All Developmental Disabilities (DD) Waiver Providers, Supports Waiver Providers, Mi Via Consultants, DD Waiver Case Management Agencies

**From:** Christopher Futey, Bureau of Systems Improvement, Bureau Chief *Christopher Futey*

**Subject:** Electronic Census Requirements in Therap

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The Developmental Disabilities Supports Division (DDSD) requires the entry and maintenance of records in Therap for all participants, both children and adults, within respective waiver standards. This memorandum does not negate or remove specific requirements within their associated waiver:

- The Developmental Disabilities Waiver Standards in Chapter 20.5
- The Supports Waiver in SW Therap Guidance v4

Providers are also tasked with maintaining an active census of participants with certain elements. DDSD is further clarifying mandatory elements and identifying where they are met in Therap for provider agencies to meet census requirements. See the Required Provider Census Elements Crosswalk to Therap Table on page two of this memorandum.

DDSD requires that all providers have these elements accurate and current within their Therap Demographics at all times. Therap allows for records to be updated anywhere the internet can be accessed via the web portal therefore demographic records must be updated within 24 hours of being notified of any change, except for individual status at the agency.

Individual's Individual Demographic Form must be admitted in Therap and enrolled in appropriate service programs by the day that they start services with an agency, this usually begins with a referral. Service programs should be named to match the waiver and service name as defined by standards. If an individual discharges a service, they should be disenrolled from the program within 5 business days. When an individual is no longer served by an agency, they should be discharged in their Individual Demographic Form by the provider agency within 5 business days. The agency should have administrative staff that have access to all individual records, which include all records of people supported at the agency of any status to be able to respond to document requests as needed.

**Table: Required Provider Census Elements Crosswalk to Therap**

Required Elements	Therap Demographics Page/Field
Status (Pending, In Service, Discharged, Deceased)	Individual Demographic Form/Status Button
Individual Last Name	Individual Demographic Form
Individual First Name	Individual Demographic Form
Individual Middle Name	Individual Demographic Form
Individual DOB	Individual Demographic Form/Birth Date
Individual SSN	Individual Demographic Form
Individual Physical Address	Individual Demographic Form/Residential
Individual City	Individual Demographic Form
Individual Zip Code	Individual Demographic Form
Individual Phone Number	Individual Demographic Form
Guardian Last Name	Contact List/Contact Entry
Guardian First Name	Contact List/Contact Entry
Guardian Address	Contact List/Contact Entry
Guardian City	Contact List/Contact Entry
Guardian Zip Code	Contact List/Contact Entry
Guardian's Phone Number	Contact List/Contact Entry
Region & Waiver	Individual Details/ID Numbers ID Type
Oversight ID	Individual Details/ID Numbers ID Number & Oversight ID (Contact Therap Unit)
Case Manager/Consultant/CSC First Name	Shared Contacts/Entry
Case Manager/Consultant/CSC Last Name	Shared Contacts/Entry
Case Manager/Consultant/CSC Agency	Shared Contacts/Entry
Case Manager/Consultant/CSC Email	Shared Contacts/Entry
Case Manager/Consultant/CSC Phone	Shared Contacts/Entry
Type(s) of Service Rendered (List all that apply)	Program Enrollment (Program with Waiver/Service Name)

Helpful Therap User Guides with step-by-step instructions:

Therap Demographics Overview: <https://help.therapservices.net/app/individual-demographic-form>

Editing Sections of the Individual Demographics Form:

[https://help.therapservices.net/app/answers/detail/a\\_id/359](https://help.therapservices.net/app/answers/detail/a_id/359)

Programs: Create, Update, & more: [https://help.therapservices.net/app/answers/detail/a\\_id/843](https://help.therapservices.net/app/answers/detail/a_id/843)

Programs: Enroll, Discharge, & Re-Enroll an Individual:

[https://help.therapservices.net/app/answers/detail/a\\_id/357](https://help.therapservices.net/app/answers/detail/a_id/357)

Discharge Individuals: [https://help.therapservices.net/app/answers/detail/a\\_id/352](https://help.therapservices.net/app/answers/detail/a_id/352)

For any questions, please contact:

- Your DDS Regional Director, or
- Therap Unit
  - Email: [DOH-DDSD.Therap.Unit@state.nm.us](mailto:DOH-DDSD.Therap.Unit@state.nm.us)

- Cross Provider SComm: DDS, Therap Unit/Therap Unit Team (DOH-DDSD)
- Mi Via Program Manager
- Supports Waiver Program Manager

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