

**Case Management Survey - DDW Billing Tool**

**Agency/Region:**

**Service: DD Waiver Case Management**

**Individual / Identifier:**

**Surveyor Completing:**

**Date/Time:**

**Surveyor Instruction:** You must document the date of face to face visit and then location that it occurred: (HV) for home visit, (SV) for site visit or (IDT) for team meeting . For monthly units At least one hour of face-to-face billable services shall be provided during a calendar month where any portion of a monthly unit is billed (Refer to chapter 21 of 2018 DDW Standards). For Case Mgt. specifically, 1. The CM is required to meet face-to-face with adult DD Waiver participants at least 12 times annually (one time per month) to bill for a monthly unit. 2. JCMs require two face-to-face contacts per month to bill the monthly unit, one of which must occur at a location in which the person spends the majority of the day (i.e., place of employment, habilitation program), and the other contact must occur at the person's residence. Other billing findings include but are not limited to include no time in/out; no signature; no service description, etc. This would not be met there was no face to face or if there were missing documentation elements.

	<i>Dates of face-to-face contact &amp; location (Home-HV or Site-SV)</i>	<i>Time of each visit</i>	<i>Total billable service time per month</i>	<i>Units Billed by AGENCY - Examine billing documentation; does it match the total service time listed in column to the left. IS IT JUSTIFIED? If not, why?</i>
<u>MONTH 1</u>				
<u>MONTH 2</u>				
<u>MONTH 3</u>				

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