

Individual Name: Juanita Rodriguez
 Medicaid Number:
 Date of Birth: 01/06/1995
 Social Security Number:

Case Note

Form ID	CN-CMDEMNM-GDP4QZVYS5TM8
Status	Submitted
Time Zone	US/Mountain
Individual Name	Juanita Rodriguez
Provider	Case Management New Mexico, CMDEMO-NM
Entered By	Christina Hill, Provider Administrator on 11/21/2018 10:41 AM
Submitted By	Christina Hill, Provider Administrator on 11/21/2018 11:03 AM
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Case Note Details

Template Name	DEMO - Monthly Site Visit 12-01-18
Service Provider	Hill, Christina / Provider Administrator
Service Date	11/21/2018
Time From	12:00 PM
Time To	01:00 PM
Activity Type	Site Visit-Home
Location	Home- Supported Living
Billable	Yes
Face to Face	Yes
Person Contacted	<ul style="list-style-type: none"> • JR • DSP Maria
Note	<p>Visited JR at her home. Although JR really gets into the holidays and wants to participate in holiday events, it is emotionally a difficult time. She sometimes suffers from depression and has in the past, most recently 2 years ago, shared she had thoughts about wishing to be dead. JR has BSC services in place but monitoring is usually increased during the holiday season by way of weekly phone calls to check in with BSC, in addition to face to face visits every other week with BSC. JR stated that staff don't always know about upcoming events and can't always accommodate her transportation needs. She reported that she has to constantly ask about events (or find them herself-which is what she should be doing) and figure out options for transportation. I reminded her she should do as much of this on her own as she can to increase her independence and rely less on staff. It is always a struggle with JR to do more on her own and not expect staff to do it all for her. JR is currently working with DVR to find employment but is very selective about what she wants to do. Finding steady employment has been a challenge but DVR has been working to find new opportunities for job trails. JR likes to look nice, have stylish clothing and wear makeup. She likes to keep her house neat and clean and decorated for the holidays. Her home was nicely decorated for the fall but she had crumbs on her shirt and wheelchair. CM talked to DSP about this. JR is always watching her weight and asks for fresh fruit, veggies and healthy snacks to be available in her home. DSP have told her there is not enough money in the house budget to always have fresh produce. CM will follow up with service</p>

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coordinator about how to accommodate JR's grocery requests. JR is due for her pre-ISP meeting and a vision appointment. CM will schedule pre-ISP for December before the holidays.

DDSD Site Visit 12-01-18

Question	Answer
1. Preparation for Visit: Summarize any individual issues which should be addressed at this visit based on preparatory work.	Reviewed GER-nothing noted. Reviewed Health Tracker-make sure Vision appointment has been scheduled, due December. Pre-ISP meeting needs scheduled in December. Check on Juniata's holiday plans,make sure DSP are assisting with scheduling events and transp
2. Rights: List any rights restrictions you observed or learned about during the site visit. Check all that apply.	Limited or no privacy
3. Rights: List any noted concerns with DSP awareness of important rights issues for the person. Check all that apply.	DSP not aware of important rights
4. Rights Summary: Provide overall summary and detail of any positive observations and/or additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses	DSP hovered over CM & JR. CM asked for time to speak with JR 1:1 and explained CM would follow up with DSP later. JR asked DSP if she could talk in her room with CM-should not have to ask to go into room with CM in her own home. DSP should allow privacy
5. Individual Satisfaction: List any concerns identified regarding individual satisfaction. Check all that apply.	Not satisfied with level of choice offered in determining personal schedule Not satisfied with level of involvement in meal planning and choice of meals Not satisfied with access to transportation
6. Individual Satisfaction: List any concerns the person has with the ISP. Check all that apply.	Not satisfied with the support he/she is receiving to accomplish his/her goals
7. Individual Satisfaction: Is the person currently satisfied with his/her job status?	Currently not working but wants to work
8. Individual Satisfaction Summary: Individual Satisfaction Summary: Based on above responses and any additional information gathered, how satisfied is the person with current services, choices, providers, relationships, and supports?	Mostly

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<p>9. Individual Satisfaction Summary: Provide detail of any positive observations and/or additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.</p>	<p>JR wants to participate in holiday activities but needs help scheduling & with transportation-says staff don't make this a priority for her. JR wants more fresh fruit & veg but DSP say no budget for that. Wants more job trials and resumes submitted</p>
<p>10. Environment: List any concerns with the environment at home or agency operated facility. Check all that apply.</p>	<p>No concerns identified at this site visit</p>
<p>11. Environment Summary: Provide detail of any positive observations as well as additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.</p>	<p>JR house clean and decorated for holidays as she likes. No concerns observed or stated by JR at this time.</p>
<p>12. Equipment: List any equipment in a person's ISP that is not present and functioning at the site if applicable to the person. Check all that apply.</p>	<p>No concerns identified during the site visit</p>
<p>13. Equipment Summary: List the specific items seen and working as well as those that were seen but not functioning or not being used as indicated. Explain follow up action needed.</p>	<p>JR wheelchair observed to be in good working condition. iPad was used during visit to look at upcoming events-was charged and working. No concerns stated or observed at this time.</p>
<p>14. Health: List any concerns with the presentation of the person observed during the site visit. Check all that apply.</p>	<p>General appearance (clothing, grooming, etc.)</p>
<p>15. Health: List any changes in health status identified at the site visit. Check all that apply.</p>	<p>Changes in activity level, mood, or other typical behavior/routines that may indicate a health concern</p>
<p>16. Health: At least quarterly, list any missing, inaccurate, or outdated health related documents that belong at the setting or should be electronically accessible to DSP. Check all that apply.</p>	<p>CARMP</p>
<p>17. KPI #2: Health (Medical Appointments): How many health-related appointments have been completed during the calendar month prior to this month's site visit?</p>	<p>1</p>
<p>18. KPI #2: Health (Medical Appointments) How many health-related appointments should have been completed during the calendar month prior to this month's site visit?</p>	<p>1</p>

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<p>19. Health (Medical Appointments): Based on preparation and completion of this site visit, list appointments that should be scheduled timely (e.g. swallow study ordered but not scheduled.)</p>	<p>Vision appointment needs to be scheduled in December</p>
<p>20. Health: Are there any observable, documented or reported concerns that indicate the need for a referral to or consultation with an existing or new therapy discipline?</p>	<p>No (explained in Health Summary below)</p>
<p>21. Health Summary: Provide detail of any additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.</p>	<p>JR has crumbs on her shirt and w/c from lunch. DSP should help her brush off crumbs since she can't on her own. Page 2 of CARMP missing. Follow up that vision appt. gets scheduled for Dec. Mood a little down-usually occurs at around holidays-tell BSC</p>
<p>22. Behavior: List any behavior plans that DSP are not aware of when applicable to the person. Check all that apply.</p>	<p>DSP aware of all applicable plans</p>
<p>23. Behavior: At least quarterly, list any applicable behavior plans missing from the service setting or electronically accessible, as applicable to the person. Check all that apply.</p>	<p>No plans missing</p>
<p>24. Behavior: Are there any observable, documented or reported behaviors that indicate a referral to an existing or new BSC is needed?</p>	<p>Yes (explained in Behavior Summary below)</p>
<p>25. Behavior Summary: Provide detail of any positive observations and/or additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.</p>	<p>JR seemed a little down but this is normal for holiday season. Let BSC know to start checking in more frequently to monitor for signs of depression or suicide.</p>
<p>26. Service Delivery: List DSP interactions with the person that demonstrate dignity and respect for the person. Check all that apply.</p>	<p>DSP include the person in developing his/her schedule DSP provide the person with information and opportunities to make informed choices DSP communicate appropriately with the person, showing respectful tone</p>
<p>27. Service Delivery: Does the person have the level of support needed at the setting?</p>	<p>Yes (explained in Service Delivery Summary below)</p>
<p>28. KPI #3: Service Delivery:(CCS in Non-Disability Specific Settings)- Is the person accessing CCS in a non-disability specific setting?</p>	<p>Yes</p>

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29. Service Delivery Summary: Provide detail of any positive observations as well as additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.	CM observed DSP talking to JR respectfully. DSP gave JR information about upcoming event and allowed JR to make an informed choice about participation and transportation option. JR talked about shopping and taking train to get to movies during CCS.
30. ISP: Is the complete ISP, including TSS and WDSI's, current and accessible to the DSP at the site?	Yes
31. ISP: Can DSP describe essential elements of the ISP?	Yes
32. ISP: Can DSP describe their role in implementing TSS and WDSI's?	Partial
33. ISP: Is work on Desired Outcomes documented or demonstrated?	Partial (Explained in ISP summary below)
34. KPI #1: (ISP Implementation): Does the balance of the evidence suggest that the ISP is being implemented?	Partial
35. ISP: Are there any significant health, behavior, individual preferences, other life changes or other notable issues that may suggest the need to revise the ISP?	No (explained in summary below)
36. ISP Summary: Provide detail of any additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.	CM asked open ended questions to DSP about outcomes. DSP knew what outcomes were and how to support JR but assists more than necessary. Documentation shows outcomes not worked on at frequency in ISP. CM explained to DSP to only provide verbal prompts.
37. ANE: Are there any reportable incidents identified during the site visit?	No
38. ANE: Do DSP know how to report ANE?	Yes
39. ANE: Is the IASP being followed (when applicable)?	NA- No known ANE report
40. ANE: If an ANE investigation was opened, check the response that applies since last site visit.	Not applicable - No open ANE investigation.
41. ANE: If an ANE investigation was opened, check the response that applies since last visit.	Not applicable - No open ANE investigation.

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<p>42. ANE Summary: Provide detail of any additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.</p>	<p>CM asked DSP about ANE reporting-DSP explained no reports currently but what they would do if they needed to report something.</p>
<p>43. Actions Needed: List follow-up actions needed before the next site visit. Check all that apply.</p>	<p>Collaborate, coordinate, and share information with other DD Waiver Service Providers Request provider action Seek scheduling confirmation from agency nurse, HCC or responsible party Schedule an IDT meeting Refer to Therapist or BSC</p>
<p>44. Actions Needed Summary: Provide detail of any additional concerns, essential information which provides evidence for responses, and/or important detail needed to explain responses.</p>	<p>Contact BSC about mood change, nurse about vision appointment, service coord. about missing CARMP page and upcoming holiday events and transportation needs, groceries in home, schedule pre-ISP meeting with IDT</p>
<p>45. Quality Assurance (Optional per Agency's QA procedure): Document information related to agency QA of this document.</p>	<p>Agency Director reviewed for 11/25/18. No follow up action requested.</p>

SAMPLE