Webinar Q & A's: Case Management Monitoring Activities and Documentation

Questions and Answers 11/27/18

Q: There are several case managers here and we are watching it as a group. Will the "test" be available to all of us?
A: Yes

Q: Is it adequate for the limitations on rights be articulated in the BSP, rather than the ISP?
A: Rights restrictions should also be articulated in the ISP as that relates to instructions provided for settings validation. Also, be sure any rights restrictions have a Human Rights Committee approval according to the DD Waiver Service Standards.

Q: Will we receive the slides that we are reviewing now?
A: Slides are posted on the DOH Website case management page
https://nmhealth.org/about/ddsd/pgsv/ddw/sas/cm/.
The webinar is recorded and will be posted on the Therap Help site.
https://help.therapservices.net/app/new-mexico.

Q: What happens if you check "cannot determine" due to client not being verbal?
A: As an IDD professional, use your experience to understand a person's strengths, needs and preferences through nonverbal communication. People who are non-verbal still communicate in various ways. Check out trainings sponsored by DDSD and other entities in this area.

Q: Would coordination with the MCO be the responsibility of the Health Care Coordinator?
A: Possibly, but nonetheless it is the case manager's responsibility to reach out to the Managed Care Organization (MCO) care coordinator and advocate for the person being supported as necessary. Healthcare Coordinators are not under DDSD authority, but case managers are required to link and coordinate with MCO care coordinators as part of the case management scope of service.

Q: To not contradict can we say, "see above" if above is well documented and answered?
A: No. Use the text boxes to provide relevant information. "See above" is not adequate.

Q: Can you go back into the form to update or make corrections after saving the form?
A: Case Notes can be updated/edited if you have the Case Note Edit privilege.

Q: How are multiple ANE's tracked?
A: Use the text boxes to indicate more than one ANE.

Q: Please clarify item #45 optional QA.
A: This question was developed during the pilot to provide case management agency directors a place to record any Quality Assurance reviews conducted on the form.

Q: Questions 40 and 41 are the same question but the options are different, is that correct?

A: They are similar but there is a critical difference, Question #40 is about IMB Decision letters and #41 is about IMB Closure letters. The responsibilities vary depending on the letter.

Q: When do we submit the site visit note? At the end of the month or when it is completed?
A: The site visit form can be submitted any time before the end of the month in which billing for that visit occurs.

Q: As a supervisor, will there be a way for me to check that all notes have been submitted?
A: Yes. Use the Case Note search and search for the timeframe in which you would like to check. The results show a column representing status. This may say draft, submitted or deleted.

Q: Will I be able to extrapolate actions needed from the site visit forms without having to go through each one?
A: There will be a Questionnaire export report available in the Reports library on the Agency Reports tab. Therap Administrators will have access to this. The webinar scheduled in January for Agency Directors will review this further.

Q: We use ISPs and IDT meeting minutes as form of visit reports. Do we still submit this new site visit report?
A: As before, an IDT meeting can replace a site visit once per quarter. Meeting minutes are required, and the site visit is not required to be completed in this circumstance.

Q: Is the hard copy not required in the clients' files? Also, how do you log in no HV/SV completed due to meetings or ISP?
A: Hard copies are not required. You may use the create a Case Note in Therap using the CM Contact note template and paste or attach meeting minutes or retain a hard copy of your IDT meeting minutes in the file.

Q: Does the site visit form need to be printed out for the office files?
A: Not per DDSD and DD Waiver Service Standards. That is an agency policy decision.

Q: Can you run through the Save and Submit portion again? Just to make sure that our info is saved the first time?
A: Within Questionnaire Pop-up: Save or save next save individual responses. Skip the question to leave blank.
Outside of the Questionnaire Popup: Save= Save Draft; Submit= represents your final submission where you are asked to verify accuracy.

Q: When will the "live-actual" form be active for us to start using?
A: 11/ 28/18. If you do not see it, check with your agency Therap Administrator first then DDSD Therap unit Kathy Baker or Hernando Martinez.

Q: If this Case Note was piloted, how much time was needed to complete this?
A: This is dependent on circumstances of the visit.

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Q: How long will these completed forms be available on line?
A: The forms are always available in Therap. Should the contract with Therap be discontinued, there will be a plan to transfer the data/records.

Q: Are these site visit forms housed in the client's file or in the case manager's file?
A: These are in the case manager internal profile. They are available to the DDSD oversight account. Other provider agencies cannot see these unless you Scomm or send them.

Q: Can we get a list with contact info of all Therap technical support?
A: Go to:
https://help.therapservices.net/app/new-mexico.

Q: How far back can you go back to make edits?
A: Edits should not be made after a month is billed.

Q: Do providers have access to the site visit if I do not Scomm them?
A: No

Q: Will the competency link be sent to us in our email?
A: It is available at the end of the PowerPoint presentation.

Q: Can site visits just be uploaded if WIFI not available?
A: No. You do need an internet connection to complete the form in Therap.

Q: Will the site visit form be available on the Mobile App?
A: Yes

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Questions from 11/28/19[i]

Q: Why does this need to be on the site visit form, ANE that is?
A: It is not a change from prior form and is related to a Jackson requirement.

Q: Please address at some point that we do not get the IASP from DHI?
A: DHI – IMB is currently working to improve this by attending Regional Provider meetings.

Q: What does an open IR have to do with the site visit?
A: A case manager's responsibility during a site visit includes being aware of an IASP and checking on the implementation. Please refer to DD Waiver Service Standards Ch. 18: Incident Management System.

Q: Do the notes of an IDT meeting in one month suffice for a visit? Or do we have to have a FTF separate from the IDT?
A: As indicated in the DD Waiver Service standards an IDT meeting may take the place of one face to face site visit a quarter.

Q: When will the memo be sent re: the 1-hour requirement to the CMs?
A: Edits to the DD Waiver Service Standards, including deletion of the 1-hour face to face requirement are planned for issue by January 2019. Until then, the requirement remains. Regardless of length of site visit, it is the case manger's responsibility to complete the scope of activities in the DD waiver Service Standards.

Q: Given the length and extensive nature of this form. How realistic is it to expect that when we see clients at home in the late afternoons when they are home from day programs that DSP who are busy with the other people in the homes, are doing their own documentation and trying to make dinner will be able to sit down and go through these questions with us?
A: Monitoring is an essential part of the case manager's job and must be completed. A site visit includes document review, interview, and observations. A case manager relies on his/her experience in the DD Waiver program to conduct a thorough site visit as well as be flexible to the needs of the person being supported.

Q: Does this form allow any portion to be edited at any time, or just specific area(s) while in draft?
A: If you have the Case Note Edit role/permission, you will be able to edit the sections of the Case Note except the service date.

Q: What is recommended for cases in rural areas with no internet access?
A: Use the fillable pdf form as a reference tool and to take notes and input the data before the end of the month in which the visit will be billed. Remember there are many checkbox answers that are easy to check. As well, a case manager can cut and paste into Therap when internet access in available.

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Q: What happens to the information if CM mistakenly fills out this form in external account?
A: DDSD is working to adjust the super role permission to prevent this.

Q: Does it make a difference if we complete the form as an Internal or External form?
A: Use the Internal account.

Q: Can we utilize the T-Log section for progress notes?
A: That is an agency decision, not required by DDSD, but certainly an option. Other NM DD Waiver provider agencies do use T-Logs. Reach out to Therap if you need more information.

Q: Unrelated to this form, will we ever get access back to the MAAT, ARST and CHAT? We utilize these for monitoring and are unable to since we cannot access them. This has been an issue for over a year now?
A: You must conduct a unified search from the external account to find the e-CHAT, Aspiration Risk Screening Tool (ARST) and Medication Administration Assessment Tool (MAAT). Therap is working on making these two custom forms available by attaching them to the e-CHAT. Until that occurs, the forms are required by provider type in print or scanned form according to Appendix A: Client File Matrix.

Q: Question. For those individuals we serve that do not have residential or CCS service and may not have a Therap ID because they chose not to purchase nursing, how do we do visit forms?
A: Once the adult turns 18 they receive a Therap ID. Work with DDSD Therap Unit if you need to create a Therap ID for someone who has just turned 18.

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[i] Redacted to remove names, duplicate questions, and comments without a question