Troubleshooting Tips for DD Waiver Case Managers Using Therap

Understanding the Oversight ID
- The *Oversight ID* is the unique *identifier for* each individual assigned by the *Oversight* Agency (i.e., DDSD).
- The Oversight ID is used to link the Oversight Agency/DDSD and DD Waiver providers that support the individual.
- Until the Oversight ID is assigned to the individual, linked providers will not be able to share information regarding the Individual.
- The Oversight ID allows information to flow from providers' accounts to the Oversight Account and to the case management account.

Understanding the Therap Administrator Account
- The agency's Therap Administrator assigns caseloads and user permissions within the agency.
- The agency's Therap Administrator needs two accounts; one for the administrator's caseload determined by the agency and one for administrative functions.

Understanding and Assigning Correct User Permissions
- Each case management agency has a Therap account and one or more agency Therap administrators who can add new staff and accept new clients into the Therap account for the case management agency.
- Case managers need at least two profiles, internal and external:
    - Internal= e-CHATs (Use the unified search under e-CHATs).
    - External= GER, Health Tracking, MAR, Health Care Plans.
- Supervisors may have a 3rd profile labeled: "Supervision" to include the caseloads under their supervision.
- Once logged in, view the upper left-hand corner to determine which profile is loaded.
- Each case manager is assigned their own caseload.
- Case managers can see the data from other providers about their respective caseload when:
    - The individual is admitted into the agency Therap account; and
    - The case manager is assigned the individual in his/her caseload.

Understanding the Individual Data Form (IDF)
- The IDF in the Oversight Account is set up by DDSD with very basic information: individual's first and last name; date of birth; Social Security number; and Oversight ID number.
- IDF information benefits the system by feeding reports and by providing data to auto populate fields in other forms.
- The IDF is completed and updated by the agency Therap Administrator(s) in that agency's account.
    - The primary provider, according to the hierarchy in the DD Waiver Service Standards 2018, must keep all required fields of the IDF up to date. Although the Primary Provider Agency is ultimately responsible for keeping this form current, each provider collaborates and communicates critical information to update this form.

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- If the case manager is not the primary provider, keeping at least the following up to date allows agencies to access helpful reports about caseloads that can assist with tracking and monitoring:
  - Demographic data – address; phone number; guardian's name and relationship to the consumer; Medicaid ID; ISP dates*; COE effective dates*; services provided by the agency; setting of services and address (if providing CCS, CIS, Family Living, Supported Living, IMLS or CIHS); region of service; and the assigned lead's name and contact information when applicable.
  - Jackson Status – There are two separate data fields that need to be completed – one in the Data Identification portion of the IDF (Class Membership) and a Custom Field toward the bottom of the form ("Is Jackson Class Member?").

The Importance of Proper Enrollment, Referrals and Discharge

- An individual who is being admitted to an agency, either a case management or provider agency, must be admitted **and** enrolled in a program within that agency. Until these two steps are taken, it is not possible to view any records on the individual.
- Completing the discharge process in Therap allows the reports to reflect the most accurate information, both at the agency and the state level.
- If it is necessary to view information about an individual after discharge from the agency, it is acceptable to wait one month before completing the discharge process in Therap or to contact DDSD to readmit the individual.
- The case manager makes a referral to each provider agency and monitors that it is completed.
- If this is not complete, the case manager cannot switch profiles and view that provider account with information on Provider IDF, Health Tracker and GER, etc.

Using Secure Communication (Scomm) in Therap

- Attachment size has increased to 10 MB. However, each document size can only be up to 3 MB. You can send documents adding up to 10 MB.
- When sending to linked providers, the link saves on size.
- When sending an SComm regarding a specific individual, use the Individual Care option. When communicating with DDSD, use the General option.
- Always click on the Cross Provider SComm box when sending an SComm outside of the CM/provider agency.

Super Roles Available to Case Managers

- Case managers have the following modules available at no extra:
  - Individual Data (view and edit; admit and discharge for administrators)
  - Individual Home Page
  - GER Review
  - GER summary
  - Case Notes (view, edit, delete)
  - Health Tracking view
  - Custom Form (submit, approve, view, update, delete)
  - Document Storage (view, add/edit, delete)

- o Health Assessment view
- o MAR DATA (view if agencies use the MAR in Therap)
- Roles must be turned on through the Agency Therap Administrator account for Case Manager Internal and other super roles that the agency may have defined
- If the modules are not viewable through the Therap administrator account, contact DDSD Therap team.

Using the Report Library for the Agency
- Access to the Report Library is available through the agency's Therap Administrator account(s).
- DDSD is working to add custom fields to the IDF so that the Client Census and Service Summary reports required by the DD Waiver Service Standards can be generated.

Resources
- NM Site in Therap: https://help.therapservices.net/app/new-mexico.
- Weekly Question and Answer Sessions for case managers hosted by Therap.
- Contact Regional Office Therap Leads.
- Contact DDSD Kathy Baker or Hernando Martinez.

* Custom field being added to the IDF.