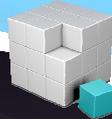


Roles in Monitoring



Roles in Monitoring



- **What is monitoring?**
 - The ongoing process of gathering sufficient information from all relevant sources about the individual, and the plan of care

Roles in Monitoring



What are the benefits of monitoring?



Roles in Monitoring



- Plan
- Service delivery
- Billing
- Budget – documentation review
- Provider documentation, monthly documentation
- Self-direction documentation – PPL portal to monitor services

Roles in Monitoring



- Participant health & welfare
- Progress to goal
- Community integration
- Quarterly service observation and follow up
- PBSP's if applicable – monitoring, documentation, modification as needed

Questions the Case Manager Should Ask to Monitor Services




- Are services being rendered in accordance with the plan of care?
- Are participant needs being met?
- Do participants exercise freedom of choice?
 - How do you verify this?
- What is the effectiveness of the PBSP/Crisis/Backup Plan?
- Do participants have access to non-waiver services?

Service and Provider Issues

Let's Talk About
The Issues

–How do you support participant to ensure they are receiving appropriate services from the provider they choose?

- Offer options for solutions that will provide the outcome that the participant seeks

Objectives



- Any habilitative service must have objectives
- Case managers are responsible for observing objectives as they are being run

What Should Observing Objectives Look Like?



- Example:
 - Participant would like to do their own laundry
 - Objective: Participant will measure detergent correctly and place washer on correct setting*
- Is the objective being run correctly based on how the team wrote the objective.
Is the goal being met?

OBJECTIVE

Objective Documentation



Case managers must write objective progress on the case manager monthly form



Case Management Documentation of the Monthly Unit and the 15 Minute Unit



This topic will cover the black and white of documentation of the monthly unit and the 15 minute unit.....

What is billable?
What is not billable?

Billable Activities - Home Visits



- Additional home visits may be completed by the case manager for times of crisis or other times when a participant might request or need more frequent home visits.
- Discussing goals, outcomes, plan, services, PBSP, supports, etc. are billable.

Case Management Billable Activities



- Meetings with participants, guardian's, family members, and back up case managers

Case Management Billable Activities



- Advocacy and referral
 - ✓ Phone calls
 - ✓ Emails
 - ✓ Participating in the IEP
 - ✓ DVR Meetings

Case Management Billable Activities



- Crisis intervention
 - Going out to the participant's home during a time of crisis is NOT billable. Calling team meetings during crisis intervention and modifying the PBSP is billable.

Let's Review

- Completed monthly case manager form from your training packet
- Review the activities listed

Case Notes



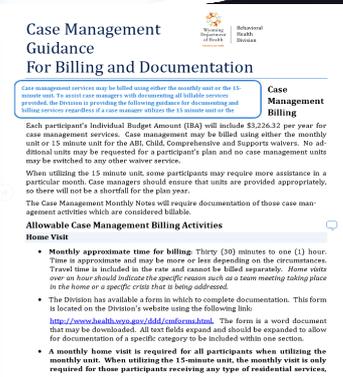
- Detailed and specific
- Planning and changing services
- Accompany monthly total of billable services

Clarification on What is NOT Billable

- Social events or outings
- Medical appointments
- Rep payee tasks
- Direct support
- Continuing education or training
- Transportation
- Crisis intervention



Case Management Guidance for Billing and Documentation



Case Management Guidance For Billing and Documentation

Case management services may be billed using either the monthly unit or the 15-minute unit. To assist case managers with documenting all billable services provided, the Division is providing the following guidance for documenting and billing services regardless if a case manager utilizes the 15 minute unit or the monthly unit.

Each participant's Individual Budget Amount (IBA) will include \$3,226.32 per year for case management services. Case management may be billed using either the monthly unit or 15 minute unit for the ABI, CHIA, Comprehensive and Supports waivers. No additional units may be requested for a participant's plan and no case management units may be switched to any other waiver service.

When utilizing the 15 minute unit, some participants may require more assistance in a particular month. Case managers should ensure that units are provided appropriately, so there will not be a shortfall for the plan year.

The Case Management Monthly Notes will require documentation of those case management activities which are considered billable.

Allowable Case Management Billing Activities

Home Visit

- Monthly approximate time for billing: Thirty (30) minutes to one (1) hour. Time is approximate and may be more or less depending on the circumstances. Travel time is included in the rate and cannot be billed separately. Home visits over an hour should indicate the specific reason such as a team meeting taking place in the home or a specific crisis that is being addressed.
- The Division has available a form in which to complete documentation. This form is located on the Division's website using the following link: <http://www.health.wa.gov/dsh/conform.html>. The form is a word document that may be downloaded. All text fields expand and should be expanded to allow for documentation of a specific category to be included within one section.
- A monthly home visit is required for all participants when utilizing the monthly unit. When utilizing the 15-minute unit, the monthly visit is only required for those participants receiving any type of residential services.



Certificates

Competency testing will be sent out via email immediately following this webinar.



Questions



Closing



Thank you for attending this training. We hope you have a better understanding of the new requirements and how to apply them in your day to day provision of services.