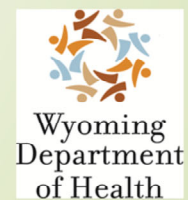Case Manager Support Call

Individual Plan of Care
CONTACTS AND DEMOGRAPHICS

Wyoming Department of Health
Division of Healthcare Financing
Developmental Disabilities Section
February 10, 2020

Wyoming Department of Health

Good Afternoon. Over the next few months the Participant Support Unit will be providing small trainings covering the screens in the Electronic Medicaid Waiver System (EMWS) during the Case Manager Support Calls. We will be going through each section and explaining what is expected. We encourage case managers to provide us with feedback, as well as any preferences on areas in the plan you would like covered. All recommendations or comments can be referred to Alex Brooks at cm.consultant@wyo.gov.

This month we will be covering the information that is required on the Contacts and Demographics screens in EMWS.

Chapter 45 of the Department of Health's Medicaid Rules establishes rules related to provider standards, certification, and sanctions. This Chapter in its entirety can be found on the Division website.
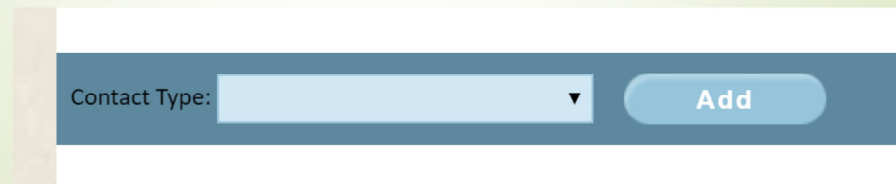
Section 9, which addresses case management services, states that case managers shall assure all information, including but not limited to guardianship paperwork and physical and mailing addresses of the participant, legally authorized representative(s), and other contacts is updated and accurate at all times. The case manager shall update the Division and other providers of any changes.

The case manager is required to keep the information in the Contacts and Demographics sections of EMWS up to date.

For more information on completing these section, you can refer to the IPC Guide, which can be found on the Providers and Case Managers page of the Division website under the *Case Manager and Provider Reference Materials* toggle.

Contact Screen

- Contact information should include family members, friends, providers, employers, therapists, etc.
- Select a contact type and click "Add" to add a contact

Contact Type: [_____ ▼] [Add]

The Contacts screen is found under Waiver Links on the left hand side of EMWS. This screen contains contact information for everyone that is important in the participant's life.

There are a variety of contacts that can be added to the contacts page including family, friends, providers, employers, therapists, Department of Family Services workers, and more.

When adding a contact, simply click on the add button. A drop down box will appear and you can select the type of contact from the menu. When entering a contact, the contact information should include name, address, phone number, and email address.

Important Contacts

- Medical professionals
- Representative Payee
- Guardian
- Backup case manager

All medical professionals, including the participant's licensed medical professional, dentist, optometrist, neurologist, psychiatrist, etc. must be listed.

The contact information for the representative payee, as well as documentation that identifies the payee, must be uploaded into this Section under the *Documents* tab. This document only needs to be uploaded one time, unless the payee or payee status changes.

If the participant is 18 years and older and has a guardian, the most current signed guardianship order should be uploaded into the *Documents* tab located under the designated guardian. Please verify that the document uploaded is the actual guardianship order. You must upload a new guardianship order any time a change is made to the order. If the guardianship order specifies that the guardian is also the conservator, representative payee documentation does not need to be uploaded. If the participant is under 18 years of age, list the parent as the parent rather than the guardian, unless there is some type of court document indicating other legal custody.

It is critical that the back up case manager is included in this section. The backup case manager can be added by using the drop down menu at bottom of the page. This is important information that will print on the IPC, and is required if the primary case manager is not able to perform case management duties. It is important to have both the current case manager and the backup case manager listed in this section with accurate contact information. When selecting an option for a "back up CM" you will need to select either provider, case worker, waiver manager etc. as back up CM is not an option.

Contacts Section – Keep Things Accurate

- Ensure information is accurate
- Delete old and duplicate contacts
- Associate needed contacts on the Circle of Supports page

It is important to keep this section up to date. If there are contacts that are no longer associated with the participant, delete them by clicking on the red **X** to the right of the contacts name.

Some of the contacts added in this section will also need to be listed on the Circle of Supports page. You can go to the Circle of Supports page and click "Associate" to bring information over and alleviate the need to enter the information twice.

Demographics

- Information required
  - Gender
  - Ethnicity
  - Current address (mailing/physical)
  - Phone number
- To delete old information, click the **X**

The Demographics screen is found under Plan Mod Links on the bottom left side of EMWS. This screen contains all important demographic information, including the participants legal name, gender, ethnicity, mailing and physical addresses, and phone number. If the participant has a preferred name other than their legal name, there is a specific box where it can be entered.

All information on this screen should be accurate at all times. If any of the demographic information changes please update the information within seven days of being notified of the change.

When making changes or deleting information that is old or inaccurate you can delete the information by clicking the red X to the right of the page.

Demographics - Participant Communication

- Include the participant's method of communication
  - If the participant is non-verbal, a preferred contact person will need to be identified
- Communication barriers must be identified
  - Provide specific and individualized information on how the participant communicates

The participants method of communication will need to be added to this screen. If non-verbal is selected under method of contact, a drop down menu will populate, and the participant's preferred contact person will need to be identified.

Potential communication barriers, (i.e., participant needs interpreter, is non-verbal, uses sign language, uses communication devise), or any other significant barriers to communication will need to be documented in this section as well.

It is not acceptable to state that the participant cannot communicate and to contact the parent/guardian/etc. The Communication Barriers Section is intended to explain how the participant communicates, and is helpful for training new providers or staff working with the participant on their ability to communicate. Everyone has some form of communication, so please be very individualized and specific in this section.

Demographics - Address Verification
- Accurate contact information
  - Full physical and mailing address
  - Email address
  - Phone number
- Verify that all information is accurate

In the Address Verification section it is important to make sure that all participant contact information is accurate. A complete address should be entered, including a PO Box, city, state, and zip code. Please indicate if the address is the physical, mailing or both. If mailing and physical addresses are different you will need to ensure that both are entered and accurate. Enter the participant's email and phone number if they have these methods of contact.

Once all of the information is entered, there is a check box that states "Address is current/up to date." This box must be checked, verifying that the participant's address is current and accurate.

As a reminder, it is also necessary to ensure that the guardians address, if applicable, is correct. It is required in Chapter 45, and is critical to ensure that guardians receive correspondence on behalf of the participant.

Questions?