

**Case Management Directors Meeting Minutes-2/19/26**

<b>Introductions 5 min-Role Call</b>		<b>Developmental Disabilities Supports Division Response</b>
<b>DD Waiver Renewal Update</b>	<ul style="list-style-type: none"> <li>▪ Notice of Public Comment- February 20, 2026</li> <li>▪ Public Hearing- March 23rd, 2026, 9:00 am</li> <li>▪ In Person:               <ul style="list-style-type: none"> <li>▪ Administrative Services Division (ASD)</li> <li>▪ 1474 Rodeo Rd., Santa Fe, NM 87505</li> <li>▪ Location: First Floor, Large Conference Room</li> </ul> </li> <li>▪ Microsoft Teams meeting:               <ul style="list-style-type: none"> <li>▪ <b>Join:</b>  <a href="https://teams.microsoft.com/meet/24338884021918?p=rpDUouLSkZG8bGVkTE">https://teams.microsoft.com/meet/24338884021918?p=rpDUouLSkZG8bGVkTE</a></li> <li>▪ Meeting ID: 243 388 840 219 1 Passcode: MC6Hy3tz</li> </ul> </li> <li>▪ Dial in option:               <ul style="list-style-type: none"> <li>▪ <a href="tel:+15053124308">+1 505-312-4308</a>,<a href="tel:+1221966294">,221966294#</a> United States, Albuquerque,</li> <li>▪ Phone conference ID: 221 966 294#</li> </ul> </li> <li>▪ Submission of the Waiver Application to CMS-April 1, 2026</li> <li>▪ Projected Waiver Application Effective Date-July 1, 2026</li> <li>▪</li> </ul>	
<b>DD Waiver Service Standards Revision-2026</b>	<ul style="list-style-type: none"> <li>▪ DDSD is currently taking recommendations for updates to the DD Waiver Service Standards.</li> <li>▪ Please provide your recommendations by 3/1/26.</li> <li>▪ Please use the Smartsheet Link below to submit any revision suggestions.</li> <li>▪ <a href="#">DD Waiver Standards Revision-2026</a></li> <li>▪ For any questions regarding the Service Standards revision, please contact the DD Waiver Program Manager, Steven Fernandez at 505 584-1687 or <a href="mailto:steven.fernandez@hca.nm.gov">steven.fernandez@hca.nm.gov</a></li> <li>▪ What the major changes to the standards are,</li> </ul>	<p><b>Some of the suggestions DDSD received include updating nursing requirements/language, changes to recommended medical examinations, clarifying case management duties, updating aspiration risk management specifications, allowing additional respite providers, changing reporting requirements and clarifying meeting requirements.</b></p> <p><b>Standards Revision Next Steps: DDSD is currently not accepting any further comments or recommendations for updates to the DD Waiver Service Standards revision. DDSD is reviewing the internal and external DD Waiver Standards comments and suggestions.</b></p>

		<p><b>DDSD will be using the comments received and suggestions to update and revise the Standards.</b></p> <p><b>DDSD is anticipating having a draft of the revised Standards for external review on June 1, 2026. This will provide an opportunity for all parties to review and comment on the proposed DD Waiver Standards revisions. Further information will be provided once available.</b></p> <p><b>DDSD is list of any major changes to the Standards.</b></p>
<p><b>Budget Worksheet Update</b></p>	<ul style="list-style-type: none"> <li>▪ DDSD will be reviewing the Budget Worksheet (BWS) for changes and updates.</li> <li>▪ Once updates are made to the budget sheet, we will conduct testing.</li> <li>▪ If you are interested in being a tester of the updated BWS please let Steven Fernandez, DD Waiver Program Manager know of your interest.</li> <li>▪ Please send any suggestions for improvements to the existing BWS to Steven Fernandez, DD Waiver Program Manager</li> <li>▪ DDSD will be working with the Medical Assistance Division (MAD) to add the modifier for Supportive Living (SL) Category 4 Behavioral Support (HB-U8).</li> <li>▪ A CM Director questioned the reason and usefulness of constant revisions – he thought the last revision was meant to be a final version.</li> </ul>	<p><b>DDSD is updating the current Budget Worksheet to ensure the document is reflective of any changes to service codes and services offered for DD Waiver Participant.</b></p>

**Individual Service Plan (ISP) in Therap**

- Current Progress of ISP Uploads: There are currently 762 uploaded ISPs for the 4,895 participants served on the Developmental Disabilities Waiver. Our goal is for all ISP's to be uploaded in Therap by the end of 2026.
- Key Points for Streamlined ISP Processing:
- Most common issue: Case Managers often upload plans but forget to *approve* them. Plans remain invisible to providers until approval is completed.
- Provider visibility problems: Providers typically cannot find approved plans because they search within their own agency by template name instead of using the Unified Search function.
- When to escalate: After the Case Manager confirms the plan is approved *and* the provider has used Unified Search but still cannot locate it.

**To request support from the Systems and Data Bureau- please using the below contact: Systems & Access Unit SCOMM Recipient Inbox: DDSD, Therap Unit/ Inbox Only – Auto Reply (DOH DDSD)**

**For Therap Support please use: Therap Support (DDSD.Therap.Support@hca.nm.gov)**

**Vineland In home assessment- Training**

- DDSD is pleased to announce Comagine Health will be offering Vineland training to all Case Managers, Consultants and internal DDSD staff.
- The intention of the training is to increase their understanding of the Vineland-3 assessment and how to interpret the results to assist them when developing and creating service plans for the participants.
- DDSD will be issuing a numbered memo in the week of February 16th. The memo will include all the details for the training including the date and times of the training and how to register. Please see the training registration details below.
- **Registration Details:**
- Registration is required to attend the training. This training is offered at two separate times, but the material covered in these sessions will be the same, so please choose the time that will work best for your schedule and click the link to register:
- [Tuesday, April 21 , 2026 - 9:30 to 11:00 am – Register Here](#)
- [Tuesday, April 21 , 2026 - 1:30 to 3:00 pm – Register Here](#)

	<ul style="list-style-type: none"> <li>▪ A CM Director asked whether the Vineland Assessment will be replacing the LOC and wanted to know who will be responsible for administering the Vineland Assessment.</li> <li>▪ A CM Director wanted to know if any pitfalls or issues have been identified with the Vineland Assessment.</li> <li>▪ A CM Director commented that it was difficult to get assessments scheduled, especially rural areas, and was concerned about who was ultimately responsible for getting these assessments scheduled.</li> <li>▪ A CM Director added that the Good Will assessors are not very flexible in accommodating appointments for the assessments and that the Case Managers end up having to facilitate the appointments.</li> <li>▪ Christina Lucero put her contact information in the Teams chat for any issues regarding the Good Will assessors and arranging these appointments.</li> </ul>	<p><b>Case Managers will not be responsible for administering the Vineland in Home Assessment. The In-Home Assessments will be conducted by the Third-Party Assessors (TPA) internal and contracted assessors.</b></p> <p><b>The Vineland in Home Assessment is currently utilized for Mi Via Participants and is intended to support service plan development. The Vineland will be utilized to assist with person centered planning and development if the Individual Service Plan (ISP) for the DD Waiver.</b></p> <p><b>No pitfalls or issues have been identified up to this point. Mi Via Consultants requested additional training regarding how to properly review and utilize the Vineland In Home Assessment to assist with service planning. DDSD will address these concerns during our planning meetings with the TPA regarding the rollout of the Vineland.</b></p> <p><b>Please contact Christina Lucero at <a href="mailto:christina.lucero@hca.nm.gov">christina.lucero@hca.nm.gov</a> for any current Good Will assessor issues.</b></p>
<p><b>Rate Study</b></p>	<ul style="list-style-type: none"> <li>▪ DDSD has received the rate study completed by Burns and Associates.</li> <li>▪ On January 27, 2026, the report was posted to the HCA Rate Study page:</li> <li>▪ You can access the rate study at the links below</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ <a href="#">Rate Studies – New Mexico Health Care Authority</a></li> <li>▪ <a href="https://www.hca.nm.gov/directors-office-rate-studies/">https://www.hca.nm.gov/directors-office-rate-studies/</a></li> <li>▪ </li> </ul>	
<p><b>Exception to the Standards/ Decision Consultation Process</b></p>	<ul style="list-style-type: none"> <li>▪ The Exception to the Standards process as it relates to medical appointments will only apply to the annual physical and annual dental appointments as required by the DD Waiver Service Standards.</li> <li>▪ Due to possible risk of complications from not following up on dental appointments, DDS D expects the provider to thoroughly document their “Due Diligence” if an individual did not want dental services.</li> <li>▪ Vision and hearing screenings are only required if recommended by a physician or if the medical record indicates that the participant has vision or hearing deficits that will require an examination and follow up appointment from a physician.</li> <li>▪ The Exception to the Standards process as it relates to medical appointments will only apply to the annual physical and annual dental appointments as required by the DD Waiver Service Standards.</li> <li>▪ Due to possible risk of complications from not following up on dental appointments, DDS D expects the provider to thoroughly document their “Due Diligence” if an individual did not want dental services.</li> <li>▪ Vision and hearing screenings are only required if recommended by a physician or if the medical record indicates that the participant has vision or hearing deficits that will require an examination and follow up appointment from a physician.</li> <li>▪ </li> </ul>	
<p><b>Secondary Freedom of Choice (SFOC)</b></p>	<ul style="list-style-type: none"> <li>▪ SFOC forms are not being sent to the selected service providers as required.</li> <li>▪ Providers have reported participants are showing up on their pre-authorizations, but they have not received the SFOC’s, have not been contacted by the Case Manager, and are not aware of the participants.</li> <li>▪ Please ensure all SFOC forms are forwarded to the Service Provider as</li> </ul>	

	<p>required by the DD Waiver Service Standards:</p> <ul style="list-style-type: none"> <li>▪ The Case Manager must contact the Provider Agency within 5 business days, after the SFOC is signed.</li> <li>▪ If Case Managers are unable to engage service providers after sending a signed SFOC, Case Managers should submit a Regional Office Request for Assistance (RORA).</li> <li>▪ A CM Director reported that when Case Managers reach out to providers about the SFOC it is common to get no response.</li> </ul>	<p><b>DDSD will request this issue be addressed at the next Quarterly Provider Meeting.</b></p>
<p><b>Allocation Reporting Form (ARF)</b></p>	<ul style="list-style-type: none"> <li>▪ Please ensure all Case Managers are updating the Allocation Reporting Form (ARF) in Therap no later than the 15th of each month until the participant is receiving services.</li> <li>▪ The ARF must be filled out completely and include all relevant details:</li> <li>▪ This includes providing the Pre-Service Intake Bureau (PSIB) with the approval dates.</li> <li>▪ The ARF must include any delays to the Level of Care (LOC) Category of Eligibility (COE) 096, Individual Service Plan (ISP) or Budget (BWS).</li> <li>▪ A CM Director wanted to know how allocations were assigned.</li> <li>▪ A CM Director asked if the ARF is going to be changed regarding initial level of care requirements.</li> </ul>	<ul style="list-style-type: none"> <li>▪ For any specific allocation questions, please contact Nicole Hernandez, Bureau Chief, Pre-Service Intake Bureau, Nicole.Hernandez3@hca.nm.gov</li> <li>▪ The initial Level of Care requirements will not be changing.</li> <li>▪ Nicole Hernandez, Bureau Chief, Pre-Service Intake Bureau, will be sending out a memo about updates and simplification of the ARF.</li> </ul>
<p><b>DDSD SOCIAL MEDIA CAMPAIGN</b></p>	<ul style="list-style-type: none"> <li>▪ Thriving Tuesday’ will feature DDSD content across Facebook and Instagram:</li> <li>▪ Exciting announcements and upcoming events</li> <li>▪ Call for Providers – an invitation for agencies or qualified professionals to step forward become a provider in our waiver system</li> <li>▪ FACEBOOK Name: New Mexico Health Care Authority</li> <li>▪ INSTAGRAM Name: nm_hca</li> <li>▪ NM Health Care Authority (HCA)</li> </ul>	<p><b>Facebook is not required for Case Manager or provider agencies and communications will continue to be sent out via standard email communication from Tammy Barth.</b></p>

	<ul style="list-style-type: none"> <li>▪ A CM Director said that she does not use Facebook and was concerned about missing important update information and announcements if they were only posted on social media.</li> </ul>	
<p><b>Updated Division of Vocational Rehabilitation (NMDVR) and DDSD Employment Supports Process</b></p>	<ul style="list-style-type: none"> <li>▪ DDSD and the Division of Vocational Rehabilitation (NMDVR) have updated the guide for coordinating employment support services.</li> <li>▪ Referrals to NMDVR can be done using the <a href="#">online referral form</a>.</li> <li>▪ Referrals should be accompanied by a signed Release of Information (ROI) and the Individual Support Plan (ISP), based on individual choice.</li> <li>▪ Providing the following documentation will make the eligibility process faster:</li> <li>▪ Proof of the participants waiver status, Supplemental Support Income (SSI) and/or Social Security Disability Benefits (SSDI).</li> </ul>	
<p><b>Employment Resources</b></p>	<ul style="list-style-type: none"> <li>▪ DDSD Employment First Webpage</li> <li>▪ <a href="#">Employment First – New Mexico Health Care Authority</a></li> <li>▪ Division of Vocational Rehabilitation</li> <li>▪ <a href="#">Online Referral</a></li> <li>▪ State Employment Leadership Network</li> <li>▪ <a href="#">Employment First Training for Case Managers</a></li> <li>▪ For Support, please contact: Alix Dean, Statewide Community Inclusion and Employment Lead <a href="mailto:alix.dean@hca.nm.gov">alix.dean@hca.nm.gov</a> (505) 819-7346</li> <li>▪</li> </ul>	
<p><b>Turquoise Claims-Update</b></p>	<ul style="list-style-type: none"> <li>▪ Exciting News: Turquoise Claims is coming later this spring!</li> <li>▪ The Medical Assistance Division (MAD) will be offering live demonstrations and additional training opportunities.</li> <li>▪ Turquoise Claims Live Demos:</li> <li>▪ MAD will be visiting 7 cities throughout New Mexico from February 23-March 14<sup>th</sup></li> <li>▪ MAD will be hosting 2 hour in person events for providers</li> <li>▪ These events will provide an opportunity to preview the new system</li> <li>▪ If you cannot attend in person, the sessions will be recorded</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ For further information regarding the location, dates and times of these events please access the following link: <a href="#">Turquoise Claims Live Demos Schedule</a>.</li> <li>▪ It is recommended to RSVP for the live demonstrations <a href="#">Take the Live Demos RSVP Survey</a></li> <li>▪ A CM Director pointed out that in trainings it's been stated that Turquoise Claims will be implemented by 3/20/2026, is this accurate?</li>   <li>▪ A CM Director said there are many problems with ISD and it is difficult getting information to and from them.</li> </ul>	<p><b>Turquoise Claims will go live on Monday, March 23, 2026.</b></p> <p><b>DDSD does not have oversight of the Income Support Division (ISD), for any issues please contact ISD directly.</b>  <b>ISD Contact Information:</b>  <b>Income Support Division</b>  <b>P.O. Box 2348</b>  <b>Santa Fe, NM 87504</b>  <b>Consolidated Customer Service Center (CCSC): 1-800-283-4465</b></p> <p><b>Please contact Steven Fernandez, <a href="mailto:steven.fernandez@hca.nm.gov">steven.fernandez@hca.nm.gov</a> with these concerns and he will complete research for the specific participants.</b></p>
<p><b>Turquoise Claims Training</b></p>	<ul style="list-style-type: none"> <li>▪ The Medical Assistance Division (MAD) will be offering two training options for the new Turquoise Claims system.</li> <li>▪ Instructor-Led Virtual Training</li> <li>▪ Self-Paced Training</li> <li>▪ During the Training, providers will learn the following: <ul style="list-style-type: none"> <li>▪ How to access and navigate the new system</li> <li>▪ Step-by-step claims submissions processes</li> <li>▪ Tools and features designed to streamline your workflow</li> <li>▪ Troubleshooting tips and available support resources</li> </ul> </li> <li>▪ For the latest updates, past communications, and FAQs: <a href="#">Turquoise Claims web page</a></li> </ul>	

<p><b>Level of Care Issues</b></p>	<ul style="list-style-type: none"> <li>▪ A CM Director strongly requested that a new LOC letter with updated formal letterhead should be made available as it is extremely difficult to get doctors to sign the current LOC document.</li> </ul>	<p><b>DDSD has created a supplemental document to be included with the Medical Assistance Division (MAD) 378, Level of Care.</b></p> <p><b>The supplemental document must be reviewed and approved prior to distribution.</b></p>
<p><b>Fiscal Management of Adult Education (FMAE) Funds</b></p>	<ul style="list-style-type: none"> <li>▪ A CM Director wanted to get clarification on what is covered by FMAE.</li> </ul>	<p><b>FMAE:</b></p> <p><b>Per the Developmental Disabilities Waiver Service Standards, Fiscal Management of Adult Education (FMAE), The Bio Park, the zoo, and museum passes do not meet the intent to use this service “for registration fees, tuition, fees, and/or related materials associated with in person or virtual classes, lessons or conferences.”</b></p> <p><b>DDSD will be issuing a memo to clarify FMAE usage.</b></p>
<p><b>Rate Study</b></p>	<ul style="list-style-type: none"> <li>▪ DDSD should advocate for Case Manager Rate Increase commensurate with Mi Via Consultant rates.</li> </ul>	<p><b>DDSD has no further information regarding approval of rate study recommendations.</b></p>

<p><b>CARMP</b></p>	<ul style="list-style-type: none"> <li>▪ Discussion about CARMP and who is responsible/liable – would this be Guardians or Providers?</li> <li>▪ A CM Director asked whether CARMP's are required for a natural family?</li> <li>▪ A CM Director said that clarification was needed for situations when CARMPs are refused by families or guardians.</li> </ul>	<p><b>For Family Living settings, the participant (if they are their own decision maker) or their guardian makes the decision to opt out of the CARMP. The Decision Consultation Process (DCP) must be followed.</b></p> <p><b>If a natural family member provides a DD Waiver service for a DD Waiver participant, the participant (if they are their own decision maker) or their guardian makes the decision to opt out of the CARMP. The Decision Consultation Process (DCP) must be followed.</b></p> <p><b>If a participant (if they are their own decision maker) or their guardian makes the decision to opt out of the CARMP. The Decision Consultation Process (DCP) must be followed.</b></p>
<p><b>Request for Attendees at the CM Directors Meeting:</b></p>	<ul style="list-style-type: none"> <li>▪ A CM Director suggested that QMB and ISD attend the Case Manager meetings.</li> </ul>	<p><b>Request for Attendees at the CM Directors Meeting:</b></p> <p><b>When agenda items are requested for the upcoming CM Directors meeting on 5/14/26, please include agenda items/questions for QMB and ISD. If agenda items/questions are provided, DDSD will request QMB or ISD to attend to address the specific items/questions.</b></p>