

**EI Targeted Case Management Task Force Meeting
June 16, 2011**

Attendance:

Alison Standing, Pamela Park, Mary Parke Holland, Sandra Church, Carol Burke, Jennifer McElwee, Chris Gregory, Gina Zydellis, Sharlene Stowers, Joyce Howard, Chris Gregory, Debra Holloway, Heidi Faustini, Brenda McGee, Jeff Beard, Beth Tolley, Tim Capoldo

Transitioning children/families from Mental Health (MH) or Intellectual Disabilities (ID) Targeted Case Management (TCM) to EI TCM

Children who currently received ID or MH TCM must transition to EI TCM October 1, 2011.

- An IFSP review is not required
- The current IFSP, even if it is the TCM version, can be continued until the next Annual IFSP
- A meeting with the family in September or October is recommended to explain the changes (using the fact sheet as a guide). If the service coordinator will change, it is recommended that both service coordinators meet together with the family prior to the change.
- The new service coordination short term goal can be added to the IFSP service coordination page the next time there is an IFSP review and/or a contact note can be used to document that the new short-term goal was discussed with the family in September or October and the new short term goal will be added to the IFSP at the next annual IFSP.
- For families who will be transitioned from MH or ID TCM to EI TCM, the Medicaid Right to Appeal must be provided. Families must be informed of this right and must be informed that EI TCM is required for children in the early intervention system (with the exception of those children who receive more MH or ID services than EI services).
- The first quarterly contact must occur in October, November or December.
- The Health status questions must be sent to the physician at the time of the next IFSP review or Annual IFSP after October 1, 2011

Initiating EI TCM for children with Medicaid who are not currently receiving TCM services

Children who are not currently receiving targeted case management must begin receiving EI TCM October 1, 2011.

- An IFSP review is not required
- A meeting with the family in September or October is recommended to explain the changes (using the fact sheet as a guide).
- The new service coordination short term goal can be added to the IFSP service coordination page the next time there is an IFSP review and/or a contact note can be used to document that the new short-term goal was discussed with the family in September or October and the new short term goal will be added to the IFSP at the next annual IFSP.
- The first quarterly contact must occur in October, November or December.
- The Health status questions must be sent to the physician at the time of the next IFSP review or Annual IFSP after October 1, 2011

For children who receive an intake visit from the end of July through September 30:

- The ID or MH 90 day TCM plan can be implemented and billed up through September
- If it is expected that the child will not have their IFSP meeting until October, the new Initial Early Intervention Service Coordination Plan can be reviewed with the family at intake (or later, but prior to October 1). This form can be completed with a start date of October 1, so that the required documentation will be in place starting October 1, 2011.

Early Intervention Case Manager Certification

The Early Intervention Service Coordination Training Module is under development and targeted to be ready August 2, 2011. Task Force members provided suggestions for specific items that should be included (health indicator questions, etc.)

Service Coordinators must apply for Early Intervention Case Manager Certification after completing the required training (beginning in August). Service Coordinators who are currently certified as Early Intervention Service Coordinators will not be required to provide experience information on the application.

System Managers will be required to complete the training module just as they are currently required to complete the four training modules required for certification. Task force members discussed requirements for completing the training module and/or EI CM certification for Supervisors who do not provide early intervention service coordination, for example, Directors of Intellectual Disabilities Services. The task force recognized that there are differing kinds of supervision, i.e. clinical and administrative and recommended that completion of the training module/test be required, but that certification as EI CM not be required. This could be monitored through review of personnel folders during a Quality Management Review.

Implementation Training

- **Billing and Reimbursement Webinar July 19, 2011 (1:00 PM – 3:00 PM)**
 - TF members recommended that program staff and billing/reimbursement staff, as well as Quality Assurance staff participate together in the webinar
 - Beth will send a note to System Managers requested that they alert their Lead Agency fiscal/reimbursement and QA staff about this webinar and plan to participate together
- **EI TCM Implementation Webinar: August 18, 2011 (9:00 AM – 10:30 AM) and August 23 (3:00 PM – 4:30 PM)**
 - Target audience: System Managers, Program Directors, Service Coordinators, Supervisors, Fiscal Staff, Quality Assurance Staff
 - Plans are underway. Volunteers (in addition to Deana, Beth and Jeff) to assist with development of the webinar include Heidi Faustini, Jennifer McElwee, Sandra Church. Carol Burke and Joyce Howard offered to be reviewers.
 - Volunteers to help present include Pam Park, Sharlene Stowers, Adele Rohner and Debra Holloway.
 - Task Force members requested that the following content be included:
 - “Clear your mind of requirements for ID and MH TCM – and focus only on EI (Part C) requirements as articulated in the Infant & Toddler Connection of Virginia Practice Manual
 - Knowledge, skills and ability requirements

- Billing can occur even if contact is not made in the three month period if good faith efforts are made and documented
- **Question and Answer Session Sept 12, 2011 (9:00 AM – 10:00 AM)**
 - Target Audience: System Managers, Program Directors, Service Coordinators, Supervisors, Fiscal Staff, Quality Assurance Staff
 - Purpose: provide a forum to address questions that have arisen after Local Systems have begun to apply what they learned in the August webinar.
 - Questions will be submitted ahead of time and there will also be an opportunity for spontaneous questions
 - Use webinar format so everyone hears the same thing and so questions can be typed in and more easily organized and addressed during the session.
- **November 14 at one PM. – Post implementation Q & A**
 - Target audience: System Managers and Task Force Members

Development of two Fact Sheets for families

Two fact sheets will be developed to provide information for families who will be moving from MH or ID TCM to EI TCM or from no TCM to EI TCM. Heidi offered to spearhead this work. Carol, Jennifer and Beth will work with Heidi and Tim Capoldo agreed to review the documents for completeness.

Fact Sheet or email communication with MDs about EI TCM

Beth and Kyla Patterson will develop a memo for Pediatricians and Family Practice Physicians in Virginia to inform them about the implementation of Medicaid Early Intervention Targeted Case Management and to alert them that they will be receiving communications from local systems requesting information about children's health status.

EI TCM Update to the Field

An update will be sent from Janet Lung to Local Lead Agency Executive Directors, System Managers, Supervisors, QA directors, and Fiscal and Reimbursement Staff in about a week

Infant & Toddler Connection of Virginia Practice Manual Revisions

The target date for completion of the Practice Manual revisions is the first of August. Work is in process now. The draft manual will be sent to task force members for review prior to finalization. Task force members asked that the instructions about timing for the Family Cost Share agreement be very specific in the revised manual.

DMAS Early Intervention Services Manual Revisions

Work is currently in process. Jeff advised the group to expect a draft in August for review and input.

Implementation Checklist

Task force members recommended that the Implementation Checklist be as inclusive as possible rather than having separate documents.

Assignments:

- Beth will update the Implementation Checklist based on today' s discussions
- Beth will send the updated checklist to members today
- Members will provide input to Beth about items to include by next Wednesday, June 22, 2011.
- Beth send an email to SM to request they alert their Local Lead Agency billing and reimbursement staff as well as QA staff to the July 19 Billing and Reimbursement Training Webinar.
- Beth and Jeff will draft the EI TCM Update
- Heidi will call the Fact Sheet group together to develop the two Fact Sheets
- Work will continue on the Required Training Module (spearheaded by Cori Hill)
- Work will continue on Development of the August EI TCM Training

Next meeting: July 28, 2011 at 1:00 at the VACSB