



Long Term Care Division

Alabama Medicaid Agency
Long Term Care Division
Outreach and Education Unit
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P R E S E N T S

An Overview of

Targeted Case Management

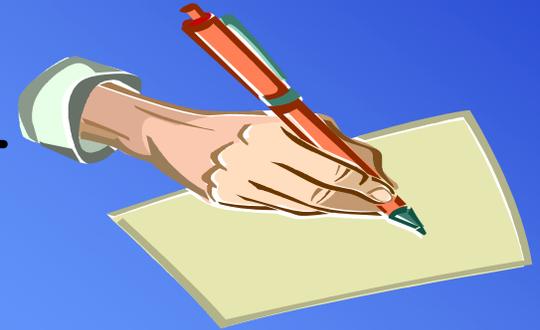
Targeted Case Management

- o Case Management services are those services which will assist Medicaid-eligible individuals in gaining access to needed medical, social, educational, and other services.
- o The Case Manager shall accomplish these services through telephone contact and/or face-to-face contact with clients or an authorized representative.



Needs Assessment

- o A written comprehensive assessment of the person's assets, deficits, and needs.



- o The following areas must be addressed when relevant:



Needs Assessment...continued

- o Identifying information
- o Socialization/
Recreational needs
- o Training needs for
community living
- o Vocational needs
- o Physical needs
- o Medical care concerns
- o Social/emotional status
- o Housing, physical
environment
- o Resource analysis and
planning



Case Planning

- o The development of a systematic, client-coordinated plan of care required to meet the identified needs of the client.
- o The plan is developed through a collaborative process involving the recipient, his family or other support system, and the case manager.
- o The needs assessment and case plan must be completed within the first 30 days of contact with the client.

Service Arrangement

- o Through linkage and advocacy, the case manager will link the client with the appropriate person and/or agency through calling and/or visiting these persons or agencies on the client's behalf.



Social Support

- o The Case Manager will, through interviews with the client and significant others, determine that the client possesses an adequate personal support system.
- o If this personal support system is inadequate or nonexistent, the case manager will assist the client in expanding or establishing such a network through advocacy and linking the client with appropriate persons, support groups, and/or agencies.



Reassessment/Follow-up

- o The case manager will evaluate, through interviews and observations, the progress of the client toward accomplishing the goals listed in the case plan at intervals of six months or less.
- o In addition, the persons and/or agencies providing services to the client will be contacted and the results of these contacts, together with the changes in need shown in the reassessments, will be utilized to accomplish any needed revisions to the case plan.

Monitoring

- o The Case Manager ascertains, on an ongoing basis, what services have been delivered and whether they are adequate to meet the needs of the client.
- o Adjustments in the plan of care may be required as a result of monitoring.

Target Groups



- o Targeted Case Management services are provided to a defined group of recipients.
- o The state is free to define the population that will be targeted.



Target Groups...continued

- o When the targeted groups are those with serious mental illness or mental retardation and other developmental disabilities, the Centers for Medicare and Medicaid (CMS) allows a state to limit service providers to the case management authorities already established in state law (i.e., the Department of Mental Health and Mental Retardation).

Otherwise, Medicaid freedom of choice of provider rules apply and a state must allow recipients to obtain case management from any qualified provider.

Target Groups...continued

- o The Alabama Medicaid Agency currently covers nine (8) target groups.

Target Groups...continued

- o Target Group 1

 - Mentally Ill Adults*

 - Medicaid-eligible individuals age 18 and over who have been diagnosed with mental illness

- o Target Group 2

 - Mentally Retarded Adults*

 - Medicaid-eligible individuals age 18 and over who have been diagnosed with mental retardation

Target Groups...continued

- o Target Group 3

 - Handicapped Children*

 - Medicaid-eligible individuals age 0-21 who are considered handicapped

- o Target Group 4

 - Foster Children*

 - Medicaid-eligible individuals age 0-21 who are in the care, custody, or control of the state of Alabama

Target Groups...continued

- o Target Group 5

 - Pregnant Women*

 - Medicaid-eligible women of any age in need of maternity services

- o Target Group 6

 - AIDS/HIV-positive individuals*

 - Medicaid-eligible individuals of any age who have been diagnosed as having AIDS or being HIV-positive

Target Groups...continued

- o Target Group 7

 - Adult Protective Service Individuals*

 - Medicaid-eligible individuals age 18 and over who are at risk of abuse, neglect, or exploitation

Target Groups...continued

- o Target Group 8

 - Technology Assisted Waiver for Adults*

 - Medicaid-eligible individuals who meet the eligibility criteria for the Home and Community Based Technology Assisted Waiver for Adults

State Agencies that provide Targeted Case Management

- o Alabama Department of Mental Health and Mental Retardation
- o Alabama Department of Public Health
- o Alabama Department of Human Resources
- o Alabama Institute for the Deaf and Blind
- o Alabama Department of Youth Services
- o Alabama Department of Rehabilitation Services
- o Children Rehabilitation Services

Prior Authorization

- o CMS recognized that a child could potentially receive case management and other services from more than one agency without the case manager having knowledge of this duplication of service.
- o If this occurred, duplicate billings might result and one agency would not be paid;

Hence, the PA procedure, EDS assigns the PA numbers to the recipient at the request of the TCM service provider agency.

Interagency Transfer

- o Recipients have the freedom to choose a provider, therefore, a "Request for Interagency Transfer" form was created to allow clients with assigned PA numbers to change case managers or agencies.
- o These are triplicate forms which are initiated by one agency, sent to the other for signature of agreement, and then forwarded to EDS for reassignment of a PA number at the new case manager/agency.

Case Management Services Provider Records

Case Management Services
Provider records must contain
documentation of:

- o Recipient's Name
- o Dates of Service
- o Name of Provider Agency and person providing services
- o Nature, extent or units of services provided
- o Place of Service



Additional Information

If you have further questions regarding Alabama Medicaid Agency Long Term Care Programs, please contact:

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