

Salus Health Holdings.

Targeted Case Management



What is Targeted Case Management?

- Targeted Case Management (TCM) is a set of services provided to a Target Population that helps our clients gain access to needed medical, clinical, social and educational services to improve the quality of their lives.
- TCM services are reimbursable through Medicaid.

What is Targeted Case Management?

- TCM in Florida is defined within the Medicaid State Plan Amendment (SPA) which has been approved by the Centers for Medicare and Medicaid (CMS). In Fl. The Department of Social Services is the agency responsible for oversight of Medicaid and the SPA.



What is Targeted Case Management?

- The Medicaid State Plan Amendment (SPA) defines TCM services as: “services furnished to assist individuals eligible under the State Plan in gaining access to needed medical, social, educational, and other services.”
- The Medicaid Provider Manual defines case management services as “the continuum of assessment, planning, linkage, support and advocacy activities systematically carried out by an individual case manager that are available to assist and enable an individual to gain access to needed medical, clinical, social, educational or other services.”

Who is the Target Population for TCM?

- DSS defines the TCM target population based on ICD10 diagnosis codes.
- In Florida, the TCM target population is defined as “individuals with serious chronic mental illness inclusive of individuals with substance use disorders and co-occurring mental illness.”

TCM Providers

- Qualified Providers must have training, experience and expertise working with their target population.
- Details on the requirements that staff members must have to provide TCM services are outlined in the Medicaid State Plan Amendment (SPA).
- On a quarterly basis, TCM providers enroll staff in the Random Moment Time Study (RMTS).

TCM Levels of Care

The following levels of care (LOC) for which TCM is expected to cover:

- Assertive Community Treatment
- Community Support Programs
- Case Management
- Intensive Residential
- Residential Support
- Supervised Apartments
- Supportive Housing
- Transitional Residential

What are TCM Services?

CLAMP

- Coordination
- Linking
- Accessing, Assessing and Advocacy
- Monitoring
- Planning
- When this set of services is included in the Treatment Plan, they should be documented and coded as TCM.

COORDINATING

Coordinating Services, Resources & Plans

- Coordination of care that involves a person interacting with **external** resources.
- Coordinating referral or supports
- Coordinating schedules and appointments with outside agencies for or with the client.
- Coordinating a plan of services, reviewing services and activities to ensure that the plan continues to meet the wants and needs of the client.

LINKING

Linking to Services & Resources

- Linking a client to **outside** resources.
- Linking the client with providers and other agencies to obtain services which addresses the client's needs and helps them achieve the goals documented in their recovery plan.



ACCESSING

Linking and Referring to Needed Services

- Services that assist and enable the client to gain access and maintain needed medical, clinical, social, educational or other services.



ASSESSING



- Comprehensive assessments at admission.
- Reassessments performed at least annually.
- Assessments and reassessments completed for the purposes of developing a treatment plan or a treatment plan update.

ADVOCACY

- Helping a client obtain something they desire; eliminating a barrier.



MONITORING

- Monitoring progress of a treatment plan objective, clearly identified in the intervention as a monitoring activity, not routine follow-up.
- Activities are necessary to ensure the plan is implemented and adequately addresses the client's needs.
- Services in the recovery plan are adequate.

MONITORING

- Changes in the needs or status of the individual are reflected in the service plan.
- Adjustments in the plan and service arrangements with providers are made as necessary and as situations change with the client.



MONITORING

Monitoring can be provided:

- Face to face or by telephone
- In a case conference with the client present
- Through collateral contact with family, friends, providers and others
- Conducted as frequently as prescribed in the recovery plan.

CONFUSION ABOUT MONITORING

What it is & What it is not

- Monitoring involves active observation of the service plan to make sure it is being properly implemented and meets the needs of the client.
- Monitoring also involves consistent help in identifying problems, modifying plans, ensuring resources are available to achieve goals and/or the objective has been achieved, and monitoring the client's participation in the plan.
- Monitoring assures services are delivered as documented in the service plan, services in the plan are adequate for the client and that necessary adjustments are made in the service plan when changes are needed.

CONFUSION ABOUT MONITORING

What it is & What it is not

- Confusion about the self administration of medication. Medication delivery is not a TCM activity. Nor is supervising/observing clients take their medication.
- The client needs to have full access to their medications and make a choice to take or not take them. The monitoring occurs when in the service plan it is written that the staff will monitor that client has taken their medication in a specific time frame (example; weekly) and that the staff person monitors via looking in the pill box or counting pills in a pill bottle.

PLANNING

- Planning with a client on any specific aspect of their goals and needs, or by participating in a treatment planning conference with a client, the client's other providers and any natural supports.



TCM DOCUMENTATION

In order to use a TCM code there must be the following items;

- 1. Initial and Ongoing Assessments-** these determine the need for any medical, social, educational and other services.
 - Assessment activities include taking a client history, identifying needs, completing related documentation and gathering information from other sources.
 - Reassessments occur at least annually but may be done more frequently.
 - Includes a diagnosis. Have the client sign a release of information (ROI) for record reporting.

TCM DOCUMENTATION

2. An **Active** Recovery Plan that identifies the plan for services.

- Identifies areas of need
- Has TCM goals and objectives
- Has TCM interventions with anticipated duration, frequency, target dates and person(s) responsible.
- Client signature or evidence of client participation-Use quotes- Document **why** the client refuses to sign or refuses to participate if that is the case.

TCM DOCUMENTATION

3. The **Progress Note** documents the services being delivered.

- The activity provided must reference a **Goal** in the recovery plan.
- The **Intervention** (What you did) and the client's **Response** to the intervention must be documented.
- The **Plan** for the next encounter must be documented.

TCM DOCUMENTATION

Writing the Note

- Progress Notes:
 1. Tell a story- a good story has a beginning, middle and end.
 2. Provide a narrative of the objectives and interventions that have been worked on.
 3. Details the client's progress in taking small steps to achieve life goals that are important to them.
 4. Provides a summary of the work and progress that has been made for the next Recovery Plan update.

TCM DOCUMENTATION

Writing the Note

- Services to clients who have no assessment, no treatment plan, or an expired treatment plan cannot be billed.
- Services to clients in an inpatient setting, nursing home, or jail cannot be billed. Double billing is prohibited. Please ensure that the service location is input.

TCM DOCUMENTATION

Writing the Note

- TCM codes cannot be used for conducting collateral services **within** your organization.
- TCM codes cannot be used for medical, educational, social or skill building services.

TCM Services

- TCM Services actively involve **care coordination** where staff interacts with an **external** resource (provider, family, friends, community members) to your own agency.
- TCM can also be any service that involves **assessment, recovery planning** or **monitoring progress** toward a Recovery Plan objective.

Examples of TCM Services

- Coordinating dental or medical care.
- Coordinating transportation.
- Helping a client enroll to get his GED.
- Monitoring client's adherence to their budget.
- Helping a client connect to a new church.
- Monitoring a client's adherence to medication.
- Assisting a client to find new housing.

Non- TCM Services

- All other types of services that involve teaching, explaining, counseling, transporting, psycho-education, coaching, researching, etc.
- Many of the services provided in your programs are not TCM but **skill building** or **case management**.

Examples of Non-TCM services

- Transportation
- All skill building activities
- Providing ADL's
- Medication delivery
- Medication supervision/ observation
- Paying bills for a client
- Helping a client move to a new apartment
- Unsuccessful attempts at services- no shows, calling and leaving messages, cancellations
- Texts and emails are not TCM services.

Use Language as a Signal

- **What you did** determines the type of intervention ...**NOT the verb** you use in the note to describe the intervention.
- **TCM:** Coordinated care with..., attended a treatment planning meeting for.., assessed progress on..
- **Skill Building:** Taught, prompted, coached, role played, demonstrated, cued, practiced
- **Case Management:** Counseled, transported, supervised, assisted with, practiced

THANK
YOU!

