

Targeted Services Management Billable and Non-Billable Activity Guide

Billable Activities	
<p>Locating: Locating activities consists of assistance to the individual in linking, arranging for, and obtaining services specified in an Individual Support Plan (ISP), including needed medical, social, habilitation, education, or other needed community services. Activities included under the locating function include all of the following, as well as the documentation of the activities</p>	<ul style="list-style-type: none"> • Facilitate the completion of assessments for planning purposes and ISP development in order to address all areas of needs and the individual’s strengths and preferences; • Gather information from other sources such as family members, medical providers, social workers, and educators to form a complete assessment of the individual; • Locate resources for the development of the ISP; • Assist the individual in identifying people to serve as part of the ISP team, and offer support to invite other people who may contribute valuable information during the planning process; • Inform individuals about the use of unpaid, informal, generic, and specialized services and supports that are necessary to address the identified needs of the individual and to achieve the outcomes specified in the ISP; • Providing information about service options, including the exploration of self-directed service options as available; • Assist individuals with enrollment in a waiver, as applicable; • Assist the individual in identifying and choosing qualified providers; • Provide information to individuals on due process rights and procedures; and • Assist individuals in gaining access to needed services and to exercise their civil rights.
<p>Coordinating: Coordinating consists of development and ongoing management of the ISP in cooperation with the individual, his or her family, members of the ISP team, and providers of service. Activities included under the developing ISP function include all of the following, as well as the documentation of the activities:</p>	<ul style="list-style-type: none"> • Use a person centered planning approach and a team process to develop the individual’s ISP to meet the individual’s needs in the least restrictive manner possible; • Use information from assessments completed based on the unique needs of the individual, to develop the ISP to address all of the individual’s needs; • Periodic review of the ISP with the individual, including update of the ISP at least annually and whenever a individual’s needs change; • Periodic review of assessments through a face-to-face visit with the individual, at least annually or more frequently based on changes in a individual’s needs, to ensure the assessment is current; • Coordinate ISP planning with providers of service to ensure consistency of services; • Coordinate with other entities, resources and programs as necessary to ensure all areas of the individual’s needs are addressed; • Contact with family, friends, and other community members to facilitate coordination of the individual’s natural support network; • Facilitate the resolution of barriers to service delivery; and • Disseminate information and support to individuals and others who are responsible for planning and implementation of services.
<p>Monitoring: Monitoring consists of ongoing contact with the individual and his or her family, providers or other entities or individuals to ensure services are implemented as per the ISP.</p>	<ul style="list-style-type: none"> • Monitor the health and welfare of individuals through regular contacts at the minimum frequency outlined in the approved Medical Assistance State Plan; • Monitor ISP implementation through face to face monitoring visits with the individual, at the minimum frequency outlined in the approved Medical Assistance State Plan ; • Visit with the individual’s family, when applicable, and providers of service

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<p>Activities included under the monitoring function include all of the following, as well as the documentation of the activities:</p>	<p>for monitoring of health and welfare and ISP implementation;</p> <ul style="list-style-type: none"> • Respond to and assess emergency situations and incidents and assure that appropriate actions are taken to protect the health and welfare of individuals; • Review individual progress on outcomes and initiate ISP team discussions or meetings when services are not achieving desired outcomes; • Monitor individual and/or family satisfaction with services; • Arrange for modifications in services and service delivery, as necessary to address the needs of the individual, and modify the ISP accordingly; • Ensure that services are identified and adequate in the individual’s ISP; • Ensure that services are being furnished in accordance with the individual’s ISP; • Work with the approving County Program regarding the approved services on an ongoing basis and when issues are identified regarding requested services; • Communicate the approved status to ISP team members, as appropriate; • Validate that service objectives and outcomes are consistent with the individual’s needs and desired outcomes; • Advocate for continuity of services, system flexibility and integration, proper utilization of facilities and resources, accessibility, and individual rights; and • Participate in activities related to Independent Monitoring for Quality, such as obtaining consent to participate from the individual, preparing survey information, and follow up activities (“closing the loop”) and other activities as identified by ODP.
<p>Transition Activities: In addition to locating, coordinating, and monitoring, Target Services Management also includes providing information and assistance in order to help individuals transition to the community.</p>	<ul style="list-style-type: none"> • Assist individuals who are moving into the community with transition planning. Transition planning activities are only eligible for reimbursement if the individual moves to the community and are compensable for up to 180 days.

Non-Billable Activities

- Outreach that occurs before an individual is determined to be eligible for ID services;
- Intake for purposes of determining whether an individual has an intellectual disability and qualifies for Medical Assistance;
- Individuals between the ages of 22 and 64 who are served in “institutions for mental disease” or individuals who are “inmates of public institutions” are not eligible for reimbursement for transition planning.
- Direct Prevention Services, which are used to reduce the probability of the occurrence of an intellectual disability resulting from social, emotional, intellectual, or biological disorders;
- General information to individuals, families, and the public that is not on behalf of a individual, such as school fairs;
- Travel time incurred by the Target Services Manager may not be billed as a discrete unit of service;
- Services otherwise available under the MA State Plan and other programs (including receipt of targeted case management administered through other service systems);

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- Waiver supports coordination must be billed as such under procedure code W7210;
- Services that constitute the administration of foster care programs;
- Services that constitute the administration of another non-medical program such as child welfare or child protective services, parole and probation functions, legal services, public guardianship, and special education;
- Direct delivery of medical, educational, social, or other services;
- Delivery of medical treatment and other specialized services including physical or psychological examinations or evaluations;
- Transportation provided to individuals to gain access to medical appointments or direct services other than Targeted Services Management;
- Accompanying the individual to a medical appointment;
- The actual cost of the direct services other than Targeted Services Management that the Targeted Services Manager links, arranges, or obtains on behalf of the individual;
- Representative payee functions
- Conducting Medicaid eligibility certification or recertification, intake processing, Medicaid pre-admission screening for inpatient care, prior authorization for Medicaid services, and Medicaid outreach (methods to inform or persuade individuals to enter into care through the Medicaid system)
- Assistance in locating and/or coordinating burial services after the individual is deceased. MA eligibility terminates on the next full day following an individual's death.