

Electronic Visit Verification and the role of Case Managers, Support Brokers, and Service Advisors



The Role of the Case Manager

Case managers, support brokers, and service advisors do not use [electronic visit verification \(EVV\)](#) to document case management activities. EVV does not change the case manager/support broker/service advisor's role in monitoring a waiver participant's person-centered service plan (PCSP). The case manager/support broker/service advisor is still expected to evaluate:

Effectiveness of PCSP
in meeting goals and
objectives

Effectiveness of PCSP
in meeting participant's
needs

Whether the current
type and amount of
services are
appropriate based on
needs and goals

How the participant
feels about the type
and amount of services
and service delivery



Monitoring PCSPs

Communication between the person-centered team is key to effective monitoring of the PCSP. The person-centered team includes:

- The participant and/or the participant's guardian or legal representative
- The case manager/support broker/service advisor
- Service providers
- Any additional individuals the participant wishes to include.

During regular monthly monitoring activities, case managers/support brokers/service advisors should discuss the following topics with the participant and/or providers:

- ✓ Progress toward goals and objectives.
- ✓ Any desired change in goals and objectives.
- ✓ Any new needs identified.

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- ✓ Any health, safety, welfare, or risk mitigation issues that need to be addressed.
- ✓ Additional community-based supports, including non-Medicaid funded services, or Medicaid State Plan services that may be needed.
- ✓ The participant's satisfaction with services.



Goals for EVV-Affected Services

The Department for Medicaid Services (DMS) encourages person-centered planning teams to focus on settings goals and objectives that are SMART.

Stated Clearly

- The goal or objective should be understandable to the participant and in his/her own words.

Measurable

- There should be markers of progress toward achieving a goal or objective that can be identified and quantified.

Attainable

- The goal or objective should be broken into small and actionable steps. Barriers to achieving the goal or objective should be identified and a plan put in place to help mitigate those barriers.

Relevant

- The goal or objective should be important to the participant. Steps toward the goal or objective should help the participant develop and use available resources to achieve it.

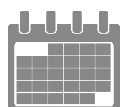
Time-Bound

- There should be a defined period for when the participant is expected to achieve the goal or objective, keeping in mind that reaching the goal or objective can take time and several steps. There should also be an agreed upon schedule in place for checking progress.

EVV-affected services are of a personal care nature. DMS understands many participants will always need these services due to their disability and improving or gaining new skills in these areas might not be possible. When the participant needs an EVV-affected service to maintain their ability to live in the community and cannot work toward improving or acquiring new skills, the goal only needs to be **stated clearly**.

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If a service is only intended to maintain the participant in the community, the goal needs to be...	If a service is clinical or intended to help the participant improve or acquire new skills, the goal should be:
<ul style="list-style-type: none"> • Stated Clearly 	<ul style="list-style-type: none"> • Stated Clearly • Measurable • Attainable • Relevant • Time-Bound



Future Mobile Caregiver+ EVV Enhancements

DMS has heard from case managers/support brokers/service advisors who would like access to Mobile Caregiver+ (formerly Tellus) to view visit information. DMS is working with Netsmart to add a role for case managers/support brokers/service advisors. DMS anticipates this change taking place sometime in 2021.



Additional Resources

If a provider agency, FMA, or case manager/support broker/service advisor has a question about EVV policy, please contact the 1915(c) Waiver Help Desk at 1915cWaiverHelpDesk@ky.gov or (844) 784-5614.

All EVV resources are available on the [DMS EVV website](#). The [EVV Who to Call Quick Reference Guide](#) includes a list of resources, common Mobile Caregiver+ issues and questions, and where to go for help.