

***Section***  
**Case Management System**

***Subject***  
**Case Management Responsibilities**

**RESPONSIBILITIES**

The Case Management Team (CMT) is responsible for the following:

**1. Person-Centered Recovery Plan**

The initial Person-Centered Recovery Plan is developed within 10 days of enrollment in the waiver. This initial Person-Centered Recovery Plan is for the purpose of initiating services. The annual Person-Centered Recovery Plan is to be completed within 30 days of the initial Person-Centered Recovery Plan. (For more information see 809-1). The purpose of the annual Person-Centered Recovery Plan is to establish the individual's goals. This time is allowed for the individual to become comfortable with the case management team and the waiver. If more time is needed to complete the Person-Centered Recovery Plan, the CMT should contact the Community Program Officer (CPO) for approval. This should be documented in the individual's record.

The Person-Centered Recovery Plan should be strength based and in first person language when articulating the individual's goals. It is important that the Person-Centered Recovery Plan be recovery focused with particular attention given to the individual's goals and crisis plan. These are to be specific to the individual and in the person's own words. Should the individual have difficulty with goal setting keep it very simple until the individual gains confidence in himself or herself and the CMT.

The individual receiving services will need to sign the Person-Centered Recovery Plan and will receive a signed copy for their records. If a representative is involved, the representative will sign the Person-Centered Recovery Plan and will be given a copy of the signed plan. The CPO will need to review and sign the Person-Centered Recovery Plan within 30 days of the signed copy.

Person-Centered Recovery Plans must be reviewed and/or updated with the individual at least quarterly or when the individual's needs, goals and/or condition warrant the change. A new Person-Centered Recovery Plan will be completed annually with the individual.

The individual's crisis plan needs to be reviewed and updated quarterly with the individual for any changes. The CMT must review each of the components of the crisis plan with the individual to determine and document any changes. Please see SDMI HCBS 809-2.

***Section***  
**Case Management System**

***Subject***  
**Case Management Responsibilities**

**2. Medication Monitoring**

Medication monitoring will be for individuals who self-administer medications. The CMT will require a nurse to visit individuals who are self-administering medications and do not have any other person monitoring their use in their homes. This activity will be documented in the individual's record. The nurse will verify the individual's medication regimen by reviewing the prescriptions and noting any discrepancy. Any missed or surplus medication will be documented and the nurse will discuss the discrepancy with the CMT, the individual, and their doctor. If it is determined that the individual cannot self-administer his or her medication the nurse will set up a process for safely distributing medication. All individuals who self-administer their medications are required to participate in medication monitoring. The reasons for any missed monitoring sessions must be documented in the records. The nurse will meet monthly with the CMT. Medication monitoring may be discontinued at the team's discretion if the individual has not had any adverse medication issues for one year. Medication monitoring may be resumed if warranted.

**3. Monthly Contact**

Monthly contact with the individual is a requirement. The contact can be by phone in conjunction with a face-to-face contact once every three months where the Person-Centered Recovery Plan is reviewed. It is important to document all efforts to make contact with the individual.

**4. Providers**

The CMT will make referrals to agencies for services identified in the Person-Centered Recovery Plan. The CMT will coordinate with these agencies and ensure the services are appropriate and delivered properly. The CMT will meet with the providers on a monthly basis to help ensure appropriate delivery of services. This is an opportunity for the CMT to discuss any issues and/or concerns of the individual or providers. The health and safety of each individual is the responsibility of each CMT.