

DATE: June 15, 2011

TO: Providers of Community Living, Private Duty Nursing, Community Inclusion,
and Case Management; DDS Staff; DHI Managers



FROM: Jennifer Thorne-Lehman, Deputy Director

SUBJECT: New DDS Policies Therap Health Tracker and Health Passport features

Attached to this letter are two new policies issued by the Development Disabilities Supports Division (DDSD) regarding mandates to utilize Health Tracker and Health Passport features of the Therap system. In order to successfully implement these policies statewide by the effective date of November 1, 2011, providers and DDSD must work collaboratively beginning July 15th.

The Health Passport was designed by a multi-disciplinary, multi-agency workgroup and piloted by several agencies. The workgroup was assigned this task to address prevalent complaints that critical, current information was not being made available to healthcare practitioners in a consistent manner. At the time this tool was finalized, New Mexico's DD system was just embarking on implementation of the Therap e-CHAT system and we recognized the potential for having the Health Passport generate automatically out of that system. Therefore we held off mandating the use of the Health Passport until the electronic version was incorporated into Therap so that it would be a change to provider practice just once, rather than changing to the hard copy version and then later switching to the electronic version.

Health Tracker has the potential to improve our DD system's ability to ensure that medical appointments are kept and followed up on, lab test results reviewed and acted upon, changes in health status are more quickly noticed and acted upon and that agency nurses, supervisors and case managers can more easily track health-related issues. We held off on mandating these features until all agencies use of the e-CHAT was well underway.

The Health Tracker has been available for voluntary use since October 2010 and the Health Passport has been fully functional for voluntary use since March 2011. Now it is time to put requirements in place so that provider agencies and DDSD use these tools to improve healthcare coordination consistently statewide.

Phase In Requirements:

- July, 15, 2011, begin training responsible parties in the use of Health Tracker and Health Passport.
- By September 1, 2011, agencies develop internal protocols which outline roles, responsibilities and timelines for collection, entry, review and analysis of Health Tracker data. This includes a decision as to whether data will be collected by direct support professionals on a hard copy for subsequent data entry, or directly entered into the Therap system electronically from the service delivery site. Please note, DDSD's recommendation is that as much information as possible be entered electronically at the site. This saves time and resources as well as reduces error.

- By September 1, 2011, agencies develop internal protocols to ensure the most current version of Health Passport is available in all service delivery sites and taken with the individual for all medical appointments, urgent care/emergency room visits and hospital/nursing home admissions. A current printed copy of this document is required at each service delivery site in case internet access is unavailable at the time an individual needs to access the healthcare system. The Health Passport should replace your agency's current doctor visit form.
- DDS e-CHAT trainers will be available to speak with agency representatives regarding considerations for development of internal protocols:
 - Metro: Lori Ellison, Ellen Hardman, Tom Burkross RN
 - NERO: Dee Finney RN
 - NWRO: Michelle Groblebe and Tamara Peterson RN
 - SE & SW: Amy Fox and Randy Cahall RN
- By November 1, 2011 all responsible parties throughout provider agencies and DDS must be able to successfully utilize these two features in the Therap system. Quick guides are available at the following links:
<http://support.therapservices.net/display/documentation/Health+Passport> and
<http://support.therapservices.net/display/documentation/Health+Tracking>. Therap also has a web-based user training on Health Tracker that can be accessed at:
<http://support.therapservices.net/display/training/Health+Tracking+Explained>. At least one training/demonstration session will be held in each region between July 15th and September 1st. These sessions will be announced before July 15th and posted on the www.trainnewmexico.org website.

Significant Events/GER

Be aware that we also anticipate using the General Events Reporting (GER) feature in Therap to report and analyze Significant Events. However, we are not yet ready to implement this change. Therefore agencies must continue to submit Significant Events on the current form and fax them to 505-222-6690. Information about the switch to GER will be available by September 2011.

e-CHAT, MAAT, Aspiration Screening - Clarification

At this time these three assessments are being completed within Therap statewide. Case Managers now can access these directly within Therap, there is no need to provide paper copies of these assessments to Case Managers. Please do continue to provide copies to Community Inclusion providers on the team, they do not yet have access to them in Therap. For all providers, only the e-CHAT Summary Report is required to be printed for the file and provided to the secondary providers on the team. The full e-CHAT is maintained electronically and is not required to be printed for the file.

Thank you for your attention to these matters.