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ASD's State Disbursement Unit Helping in Many Ways



ASD's State Disbursement Unit is looking to automate its work so they can help the department in other ways. (Standing, from left) Gilbert Herrera, Eva De Aguero, Joe Anaya, Angelique Griego, Vivian Herrera, Marta Rodriguez, Adi-Risa Gonzales, Patricia Roybal, Leyla Romero. Kneeling from left) Allen Thompson, Joe Montoya, and John Vigil.

The 14-person State Disbursement Unit (SDU), tucked away deep inside the Administrative Services Division (ASD), is helping to reduce the number of child support complaints the department receives. And how do they do that, you ask? Well, they recently decided to allow the U.S. Postal Service to begin forwarding child support checks to new mailing addresses, instead of having them automatically returned to the unit for canceling and reissue. "We have cut down on the number of returned checks by about 300 a month," said Allen Thompson, SDU Bureau Chief. "Doing this potentially not only reduces complaints, but the state saves money too because we don't have to go through the canceling and re-issuing process."

The SDU has experienced other changes as well: they were transferred out of the CSED to ASD over a year ago. This was part of a larger reorganization to bring more of the financial and accounting responsibilities under ASD. In fact, Thompson has very little experience in child support enforcement, but he does have over 25 years' experience in data processing with the large Chicago-based Automatic Data Processing, or ADP, which makes him a perfect fit for overseeing a unit that processes over \$7 million of collections monthly. This results in 35,000 checks and electronic payments issued to custodial parents, totaling about \$6 million dollars.

(About \$1 million each month goes back into the state general fund to offset financial assistance custodial parents have received from the department when child support payments were not being received.)

When Thompson first started with ASD two years ago, he was asked to get the CSES interface working again with ASD's Joint Accounting System. "Now the books do exist and balance, so there is no more voodoo involved in arriving at year end figures," he said.

His next goal is to make things even easier for the thousands of custodial parents who receive checks each month by doing away with the old-fashioned mailing of checks and posting the money into custodial parents' individual debit card accounts. This new card may be for a combination of programs, which will make life even easier for custodial parents who are also receiving assistance from other social services' programs. "Debit cards will also save the department money by reducing overhead related to printing and mailing checks," said Thompson.

Also, automating the posting process will improve accuracy and efficiency and free up resources to do other things that computer software can't do. When the SDU achieves these goals the number of child support complaints the department receives may decrease even more.

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ISD Forms Now Available Via the Intranet

Even with the department looking to bring its computer systems into the 21st Century (see related story) others in the Income Support Division aren't waiting. "Katie Falls asked us to see what could be done now to make the forms that field staff use on a regular basis available in an electronic format on line," said Cathy Sisneros, Bureau Chief, Program Quality and Management Bureau.

Evelyn Costello was assigned to this project. Fortunately, some ISD staff had already developed many of the forms in a Word format during the 2002 SSALSA project (http://www.state.nm.us/hsd/pdf/SinNombre_Feb02.pdf), including Elizabeth Garcia of Belen and Sharon Sumner of Clovis. Costello worked with DoIT's Robert Adams to establish the shared server intranet site where there are currently 75 ISD forms posted, ready for use by ISD staff across the state. One of the first things Costello did was inventory all of the forms used by the department. Incredibly, they came up with 250 of which 112 are ISD related. "Most of the forms are in *Word* format. Caseworkers can fill them out and print them on line," said Costello. "Others are in PDF format and can be printed by workers on an as need basis."

The department has been trying for years to make "interactive" (meaning they can be filled out online) forms available via an intranet, but the
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Medicaid's *MI VIA* Paves the Way for Waiver Programs Self-directed Care

In Spanish, *Mi Via* loosely means “my way”, which is the objective of a program that may be up and running in July 2006. The Human Services Department, the Department of Health and the Aging and Long-term Services Department have agreed on a Medicaid self-directed waiver that will allow about 10,000 low-income elderly and disabled adults and disabled children on Medicaid – by far, the most costly Medicaid category enrollees – the option to create their own program of care in a community setting.

“This has been in the planning stages for about five years, and I’m happy to see that the three departments have now reached an agreement on the best way to move forward,” said Mary Kay Pera, a long-time MAD employee who is now working under contract for the division to get the Self-Directed Waiver Program (SDW) written and approved by the feds. A concept paper can be reviewed at http://www.state.nm.us/hsd/mad/pdf_files/SchHealth/SDWConceptPaper.pdf. “We will provide our plan to CMS in the coming months and look forward to having it approved and operating within a year.”

In Medicaid terminology, a “waiver” is when the federal government allows states to waive certain statutory requirements of the Social Security Act with the goal of providing more home and community-based care and less institutional care. Self-directed waivers give clients even more control of the type of care they receive in a community setting.

“An important consideration has to be made when applying for a self-directed waiver: it can’t cost more money per client than the status quo,” said Pera. However the state could save money under self-directed care because required services that many people might not absolutely need won’t be provided. This is where *Mi Via* comes in: clients will have more flexibility in producing an individual plan and budget for themselves that meet not only medical needs but social needs as well. Medicaid clients, with the help of a consultant if necessary, will submit their individual care plan and budget to the state for authorization “Most plans will be approved, unless, for some reason, it is not in line with federal and state rules,” said Pera. “Before approving an individual’s self-directed plan, we have to ensure there is no abuse of the client and balance the program’s goal of control and flexibility with the health and safety of the client.”

Eligibility for SDW *Mi Via* is not only for those in the four Medicaid waiver programs (Disabled & Elderly, AIDS, Developmentally Disabled and Medically Fragile). Other Medicaid clients who can apply are nursing home residents, people with mental disabilities, and, new to Medicaid, individuals with traumatic brain injuries, thanks to HB 318 that was signed into law this year. Another plus is service definitions among all the waivers will be standardized for greater efficiency in administration and to save money.

The SDW *Mi Via* concept paper lists the services that

participants can ask to purchase as part of their live-at-home budget. These include home appliances; computers and other assistive technology, devices or services; durable medical equipment not covered by Medicaid; the cost of social activities and community participation in social and recreational organizations; as well as non-covered medical and dental expenses, non-medical transportation, and alternative health.

SDW *Mi Via* follows the same concept as the popular Medicaid Personal Care Option that allows people to continue to live at home. Each program allows the money to follow the individual based on his or her need, from an institutional care settings, to a home and community.

Participants will work with a fiscal intermediary (FI), who will be independent of the entities/persons delivering services or supports to avoid conflicts of interest. Based on the individual budget, the FI will set up an individual account, make expenditures that follow the authorized budget, handle all payroll functions on behalf of participants who hire service providers and other support personnel, provide the participants with a monthly report of expenditures and budget status, and provide Medicaid a quarterly documentation of expenditures. “Having the opportunity for getting the SDW *Mi Via* off the ground will be a huge personal achievement for me,” said Pera. “Over the years, there have been a number of families and advocates who have urged us to do this, now it may come to pass.”

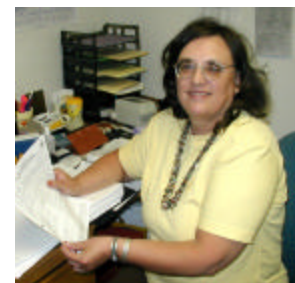
ISD Forms

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process isn’t as easy as one would expect. One of the major hurdles was updating the forms and putting them in *Word* format. “Unfortunately, there are still formatting problems inherent in *Word* when they are interactive,” said Sisneros. “We are evaluating the use of *Adobe* Software, which is much better suited for this.”

The forms must still be printed and manually placed in clients’ case record – something replacing the ISD2 system may solve. The completed forms will be more professional looking especially if someone’s penmanship isn’t up to par, paper and shipping costs will be saved and revisions can be made as often as necessary without having to exhaust current supplies of forms first. “Most caseworkers are highly computer-literate,” said Costello. “It will be easy for them to begin completing the forms this new way right away, and they won’t have to worry about stockpiling different forms in their offices.”

The forms are secure so they can’t be tampered with unless you have a special password. “The biggest problem with our forms is being able to quickly update them when policy changes,” said Sumner. “Electronic forms will alleviate that problem. I’ve been using them for my interviews and my clients comment on how much easier they are to read.”



ISD’s Evelyn Costello has been central office’s point person for ensuring the successful transfer of 75 different forms to the Intranet now being used by ISD caseworkers across the state.

HSD Looks at California's Integrated Service Delivery System

Last month Accenture, a long-standing computer systems contractor with the department, briefed staff on the integrated computer delivery system they successfully fielded in four Los Angeles-area California counties in 2004. An Accenture publication touting the system says the web-based Consortium-IV (C-IV) eligibility system is the only proven system of its kind in the country, allowing workers to be more productive and provide better customer service. It must be robust because it's successfully serving 800,000 Californians and has 6,800 users each business day.

"It is encouraging to see that after three years in development, the C-IV system utilizes newer technologies and has been through a number of design adjustments to accommodate California caseworkers," said Dmitry Nukhman, HSD's Deputy CIO.

C-IV determines eligibility for more than 11 social programs, including TANF, food stamps, LIHEAP, refugee resettlement, child care, Medicaid, foster care and employment services. It also provides case management, including issuances and overpayments, and helps detect fraud. Accenture's Alan Lowden said the system wasn't designed to include child support enforcement, but it could be programmed to network or data match with the department's child support enforcement computer system.

"One of the biggest challenges we had in California was determining what constitutes a case for all these different programs," said Lowden. "There are different definitions of what a case is, so some households have multiple cases, such as when two or more families or family members in one household are receiving TANF and other financial assistance services, while grandfather is in a

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Las Cruces Employees Hold Barbecue



Delia Regalado, (left), Las Cruces CSED acting line manager and County Director Bill Burk.

Las Cruces ISD and CSED employees enjoy a friendly game of volley ball. Unfortunately, the game had to be called because someone hit the ball too high and it was stuck in a palm tree.



Helen Salgado (left) receives a High 5 Award from HSD Secretary Pamela Hyde for volunteering to publish the Anthony ISD office's monthly newsletter.



Linda Garay (left), Eva Lujan and Helen Gonzales enjoy from the West Las Cruces ISD office the barbecue with spouses and friends.



ISD workers David Saxton (left) Alvina Locklear and Christina Lopez cool off in the shade.

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nursing home under Medicaid.”

Other system challenges included finding a happy medium on when to alert caseworkers that something needs to be done. “If too many notices are in a worker’s inbox, they tend to ignore them,” said Lowden. Accenture devised three types of worker alerts: *announcements*, which include general information of interest to all workers; *recommendations*, which could be a follow-up with a client who intends to move the next month; and *alerts*, which must be done by a worker as it will affect a client’s eligibility

C-IV also generates notices in English and Spanish and has an imaging system so letters and earning statements or utility bills can be scanned into the system and become part of the client’s case history and TANF work activity information can be entered into the system. And, C-IV enables workers to keep multiple case files open on the computer screen, helping workers answer current clients’ questions while working on a new case.

“The best thing about C-IV is that it allows workers to enter the facts and then the system figures out what the client is eligible for,” said Lowden. “In eight seconds it will go through 5,000 eligibility rules, including Medicaid – the most complex program of all – and determine what a client is eligible for.”

Of course, purchasing a system like C-IV isn’t cheap. “This is the first of many integrated service delivery systems we will be reviewing,” said Conny Maki, HSD’s CIO. “In the process of replacing the Department’s ISD2 system, we will be looking at what’s available in both the private and public sectors. We are looking at systems that utilize technology that will serve us well into the future.”



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What's wrong with this picture?!?!?!?