

**TRI-COUNTIES REGIONAL CENTER
TARGETED CASE MANAGEMENT REVIEW
2012**

Individual #2 (3) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
01/11/11 03/30/11	D D	1 1	These entries are for the SC preparing forms and responding to requests related to consumer spending down monies. The direct provision of services, such as money management, cannot be claimed as case management. Therefore, the time claimed should be reversed.	These entries have been reversed.
04/25/11	D	1	This entry states, "Written communication from (name) regarding (name), need the address to the doctor to remit correct payment." This description is not sufficient to determine if this is case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.

Individual #4 (1) unit

Date	Activity	RC Units	Comment	Regional Center Plan/Response
09/29/11	T	1	This entry states, "T/C to (name) making her aware that the above request has been completed." This description is not sufficient to determine if this is case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.

Individual #6 (3) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
10/18/11	T	3	This entry is for leaving three voice mail messages. The description does not support the total amount of time claimed. Therefore, the time claimed should be reduced to an amount appropriate for the task.	This entry has been reduced.

Individual #9 (9) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
02/10/11	D	1	This entry states, "Added some info to the amendment that was obtained at meeting on 2/9." This description is not sufficient to determine if this is case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.
02/16/11	D	1	These entries are for a variety of administrative activities, including sending and receiving chart to support staff, receiving signed consent forms, and forwarding documents. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.
02/16/11	D	1		
02/18/11	D	1		
05/19/11	D	1		
08/26/11	D	1		
08/30/11	D	1		
09/02/11	D	1		
10/10/11	D	1		

Individual #15 (8) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
04/05/11	D	1	This entry states, "Completed POS to reflect miles for (name). As they have called and informed it was not initially done when POS was written." This is an administrative activity. Therefore, the time claimed should be reversed.	This entry has been reversed.
10/07/11	D	7	This entry is for contact with a service provider regarding respite billing. This is an administrative activity. Therefore, the time claimed should be reversed.	This entry has been reversed.

Individual #16 (4) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
02/10/11	D	3	These entries are for "forwarding reviewed social security documents and for mailing out of a Medicaid Waiver form. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.
05/04/11	D	1		

Individual #18 (4) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
05/31/11	T	1	This entry states, "Received rent statement from (name). Confirm rent amount." This is an administrative activity. Therefore, the time claimed should be reversed.	This entry has been reversed.
09/02/11	D	1	This entry states, "Sent DOR referral form to (name) for her to sign and send back." This description is not sufficient to determine if this is case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.
09/15/11	T	2	This entry states, "Messages from (name). SC calls back and leaves message. Phone tag." This description does not support the total amount of time claimed. Therefore, the time claimed should be reduced to a time more appropriate to the task.	This entry has been reduced.

Individual #19 (4) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
05/31/11 08/22/11 10/28/11	T C C	2 1 1	These entries are for receiving messages from client trust regarding spend down for consumer, obtaining/forwarding receipts, and checking client trust balances. The direct provision of services, such as money management, cannot be claimed as case management. Therefore, the time claimed should be reversed.	These entries have been reversed.

Individual #20 (5) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
08/31/11	T	5	This entry is for setting up IPP meeting. This description does not support the total amount of time claimed. Therefore, the time claimed should be reduced to a time more appropriate to the task.	This entry has been reduced.

Individual #21 (3) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
10/13/11 11/30/11	T T	2 1	These entries are for contact with provider regarding billing issues. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.

Individual #29 (3) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
01/13/11	C	1	These entries are for conversations with service provider and regional center management about billing. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.
01/13/11	C	2		

Individual #31 (11) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
09/20/11	T	2	These entries are for leaving and receiving voicemail messages. The descriptions do not support the total amount of time claimed. Therefore, the time claimed should be reduced to a time more appropriate to the task.	These entries have been reduced.
09/21/11	T	2		
09/21/11	T	2		
09/20/11	C	5	This entry is for a series of voicemail messages and leaving messages. The descriptions do not support the total amount of time claimed. Therefore, the time claimed should be reduced to a time more appropriate to the task.	This entry has been reduced.

Individual #32 (2) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
01/26/11	T	1	These entries are for telephone messages to (name) regarding an authorization request and for five staff that are in process of becoming IHSS certified. These descriptions are not sufficient to determine if this is case management. Therefore, the time claimed should be reversed.	These entries have been reversed.
01/28/11	T	1		

Individual #35 (4) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
4/22/11	C	1	These entries are for conversations with a provider concerning billing and subsequent adjustments that were needed to pay. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.
7/25/11	C	3		

Individual #37 (2) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
06/09/11 06/15/11	T C	1 1	These entries are for contact with a service provider and with regional center POS Manager regarding billing. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.

Individual #42 (1) unit

Date	Activity	RC Units	Comment	Regional Center Plan/Response
09/26/11	D	1	This entry states, "Rec'd notice that SLS is over 125%." This description is not sufficient to determine if this is a case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.

Individual #45 (14) units

Date	Activity	RC Units	Comments	Regional Center Plan/Response
03/16/11	C	2	This entry states, "Communicated with (name) verification where restoration check goes." This description is not sufficient to determine if this is case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.
10/12/11 10/19/11 11/14/11 11/14/11 12/19/11	T T T T T	2 3 2 2 3	These entries are for making and receiving voice messages followed by subsequent contact and claim on the same day. When combined, the description does not support the total amount of time claimed. Therefore, the time claimed should be reduced to an amount appropriate for the task.	These entries have been reduced.

Individual #46 (1) unit

Date	Activity	RC Units	Comment	Regional Center Plan/Response
07/26/11	D	1	This entry states, "Sent restoration check verification to, (name)." This description is not sufficient to determine if this is case management activity. Therefore, the time claimed should be reversed.	This entry has been reversed.

Individual #50 (2) units

Date	Activity	RC Units	Comment	Regional Center Plan/Response
08/11/11 11/09/11	D D	1 1	These entries are for preparing a packet and submitting documents for approval. These are administrative activities. Therefore, the time claimed should be reversed.	These entries have been reversed.