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MEMORANDUM

TO: Executive Directors, DSN Boards of Case Management
CEOs, Contracted Service Providers of Case Management
Case Management Supervisors

FROM: Lori Manos, Associate State Director-Policy *fm*

DATE: August 16, 2022

SUBJECT: Case Management Monitoring Requirements

The purpose of this memo is to reinforce the importance of the monitoring and face-to-face contacts required for case management providers as part of service provision. Despite the extended public health emergency, all case management activities and due dates for specific case management tasks have remained in place and continue to be required.

Appropriate service monitoring includes face-to-face contact, which is a key component of case management services. Face-to-face contacts are necessary and required to ensure the health, welfare, and safety of those served.

According to the Waiver Case Management standards “when exceptional circumstances prevent the completion of a required face-to-face contact, a contact that is not face-to-face may be made in lieu of the required face-to-face contact.” If exceptional circumstances are present, documentation regarding the absence of the face-to-face encounter must detail and support this. Unless exceptional circumstances exist, the requirement for face-to-face contact must be met for case management tasks including, but not limited to, annual assessment/planning, quarterly Waiver Case Management monitoring, and nursing facility level of care re-evaluation.

In the event that exceptional circumstances prevent the completion of a face-to-face encounter, case managers are expected to assess any necessary services or supports resulting from the documented exceptional circumstance, and to see the person served at the next appointed time or sooner.

Questions regarding this may be directed to Melissa Ritter at mritter@ddsn.sc.gov.