



Tailored Care Management Technical Advisory Group (TAG)

Meeting #36

*Provider Manual and Tailored Care
Management Updates*

April 25, 2025

Announcement

Please note that we request that no one record this call or use an AI software/device to record or transcribe the call. DHHS is awaiting additional direction from our Privacy and Security Office on how we need to support these AI Tools. Thank you for your cooperation.

HIPAA-covered DHHS agencies which become aware of a suspected or known unauthorized acquisition, access, use, or disclosure of PHI shall **immediately** notify the DHHS Privacy and Security Office (PSO) by reporting the incident or complaint to the following link:
<https://security.ncdhhs.gov/>

Agenda

○ Welcome and Roll Call

○ Best Practice Presentations

- Role Specialization

The Arc of NC

- Flexible Outreach Methods

Hope Services

- Team Dynamics and Morale

Pinnacle Family Services

○ Tailored CM TAG DSC: Assessment and Next Steps

○ Discussion

○ Public Questions/Comments

Welcome and Roll Call

Department of Health and Human Services

Kristen Dubay, MPP	Andrew Clendenin, MSW	Loul Alvarez, MPA	Regina Manly, MSA	Eumeka Dudley, MHS	Gwendolyn Sherrod, MBA, MHA	Tierra Leach, MS, LCMHC-A, NCC
Chief Population Health Officer	Deputy Director, Population Health	Associate Director, Population Health	Senior Program Manager, Tailored Care Management	Program Manager, Tailored Care Management	Program Manager, Tailored Care Management	Program Manager, Tailored Care Management

Contact: Medicaid.TailoredCareMgmt@dhhs.nc.gov



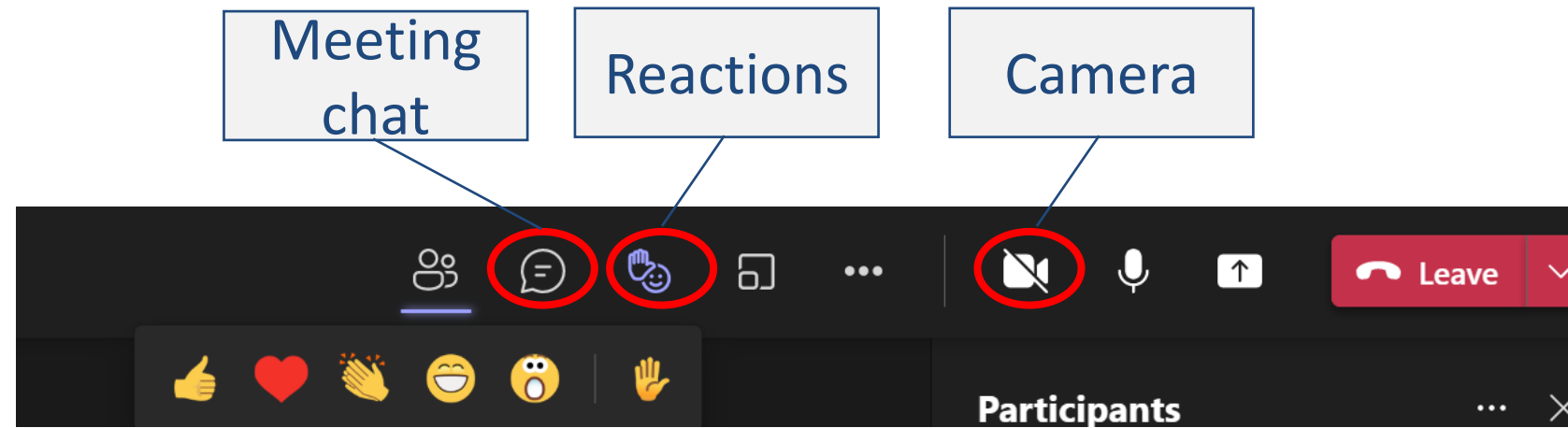
NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

Tailored Care Management TAG Membership

Name	Organization	Stakeholder
Erin Lewis	B&D Integrated Health Services	Provider Representative
Julie Quisenberry	Coastal Horizons Center	Provider Representative
Billy West	Daymark	Provider Representative
Denita Lassiter	Dixon Social Interactive Services	Provider Representative
Luevelyn Tillman	Greater Vision Counseling and Consultants	Provider Representative
Keischa Pruden	Integrated Family Services, PLLC	Provider Representative
Joanna Finer	Pinnacle Family Services	Provider Representative
Sandy Feutz	RHA	Provider Representative
Lisa Poteat	The Arc of NC	Provider Representative
Eleana McMurry, LCSW	UNC Center for Excellence in Community Mental Health	Provider Representative
Donna Stevenson	Alliance Health	Tailored Plan Awardee
Lynne Grey	Partners Health Management	Tailored Plan Awardee
Cindy Ehlers	Trillium Health Resources	Tailored Plan Awardee
Chris Bishop	Vaya Health	Tailored Plan Awardee
Cindy Lambert	Cherokee Indian Hospital Authority	Tribal Option Representative
Jessica Aguilar	N/A	Consumer Representative
Pamela Corbett	N/A	Consumer Representative
Jonathan Ellis	N/A	Consumer Representative
Alicia Jones	N/A	Consumer Representative

Increasing Engagement

We encourage those who are able to turn on cameras, use reactions in Teams to share opinions on topics discussed, and share questions in the chat.



Role Specialization

Integrating Physical Health and Achieving Whole Health Outcomes for People with IDD

Kristy Myers, RN, ALNC

Director of Integrated Health, The Arc of NC

Specialized Role Support – CM Teams, Individuals, and Families

- Training
- Health promotion
- Consultation
- Data collection and reports

Training

- NC HealthConnex – overview and navigation
- Importance of routine annual wellness visits (PCP and Dental)
- Fatal Five in people with IDD
- Individualized chronic health conditions
- Medication monitoring and reconciliation
- Monthly health promotions to support education and engagement

Consultation

- Specialized nurse consultation for complex cases and chronic health needs
- Collaboration with primary care, specialty providers, and hospitals
- Outreach and in home visits with individuals and families
- Gateway to specialized consultation: MD, psychiatrist, psychologist

Enhancing Access to Data and Reports

- Routine Primary care and dental visits
- Health promotion tasks
- Development of chronic health reports
- Determining measures (outside of HEDIS) that reflect the best outcomes for people with IDD

Flexible Outreach Methods



Flexible Outreach Methods



Adjusting Communication



Make contact at most convenient times for patient



Discuss available times for contact with patient



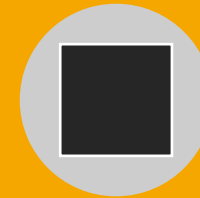
Customize CM work schedule to accommodate patient



Re-assess preferences for patient based on changes in scheduling and life circumstances



Utilize interpreter services as needed



Contact after business hours if this meets patients needs

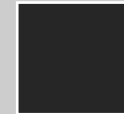
Leveraging Community Connections



Establish community relationships



Keep updated list of community resources



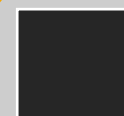
Provide resources to patients as needed



Contact local Department of Social Services if their involved with patient



Contact providers involved with patient



Review Claims Data for updated contact info and service providers

Improving Accessibility and Engagement



Contact primary care providers



Search NC Tracks for current primary care provider information



Contact any current service providers



Send engagement letters in attempt to contact patient



Locate all phone numbers and attempt all patient phone numbers



Send engagement email to patient in attempt to contact patient



Contact local Medicaid workers at Department of Social Services to gather contact information



Utilize Alliance transition coordinators to provide updated contact information when ADT notification is received



Specific Care Manager assigned to work with and coordinate with patients within other internal services

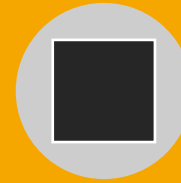
Offer Patient Centered Care



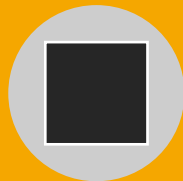
Ask patient preference of contact



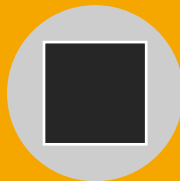
Offer various types of communication including phone, in person, telehealth, follow up summaries, etc.



Be empathetic and acknowledge patient needs



Assist with applications as needed



Explain how TCM can assist with the needs that patient shares to assist with OPT in



Be calm and respectful of patient's time and be compassionate during conversations



Build rapport with patient to ensure patient feels comfortable working with CM

Be Consistent with Contact



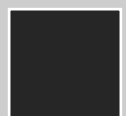
Make attempts to contact each patient on caseload



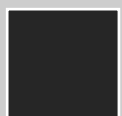
Ask coworkers for assistance with contact if assigned CM is unable to make attempts



If contact is lost with patient send unable to reach letter



For transient patients, consider requesting alternative point of contact and obtaining ROI

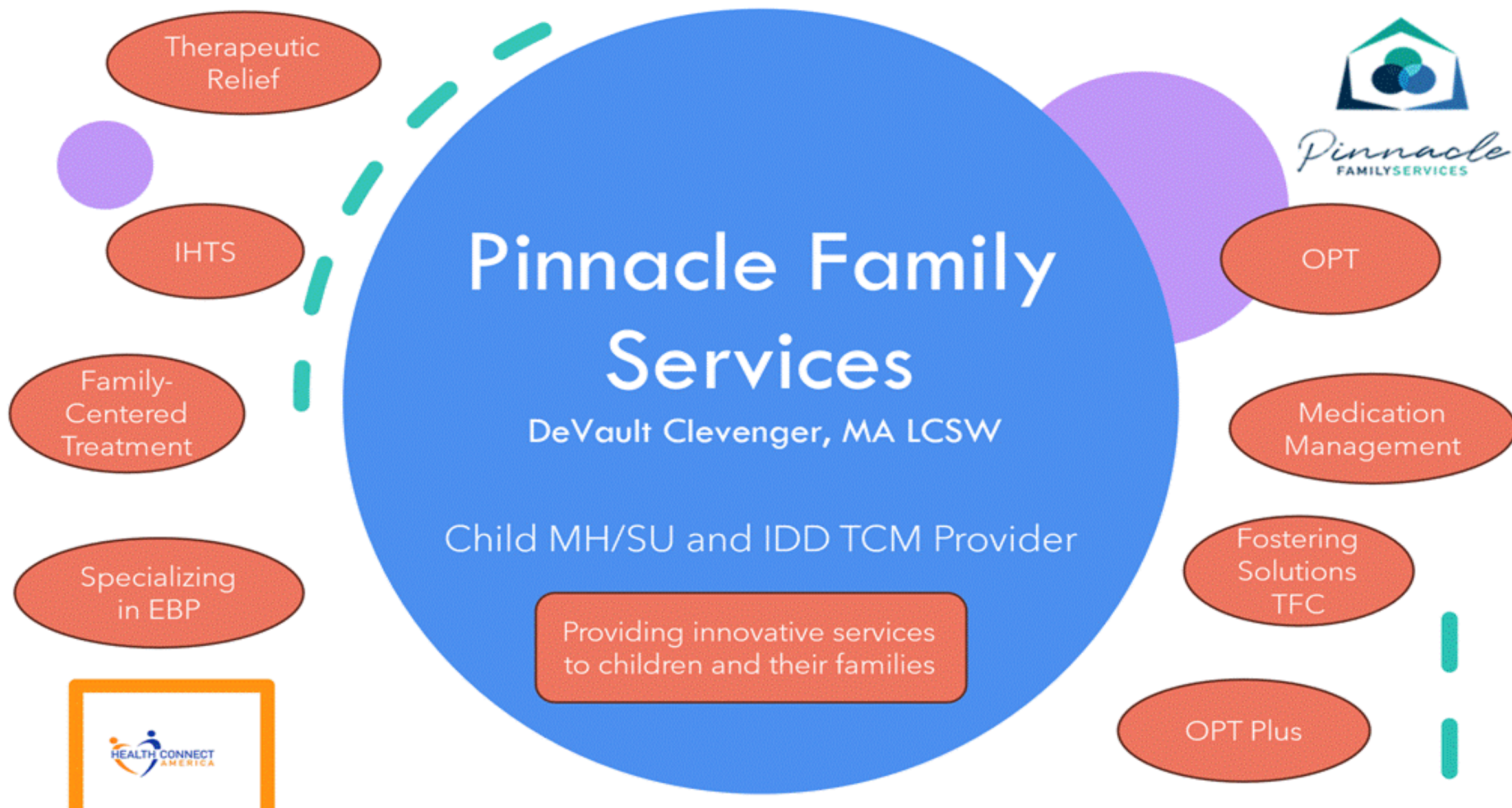


Manage contacts with patient based on patient needs

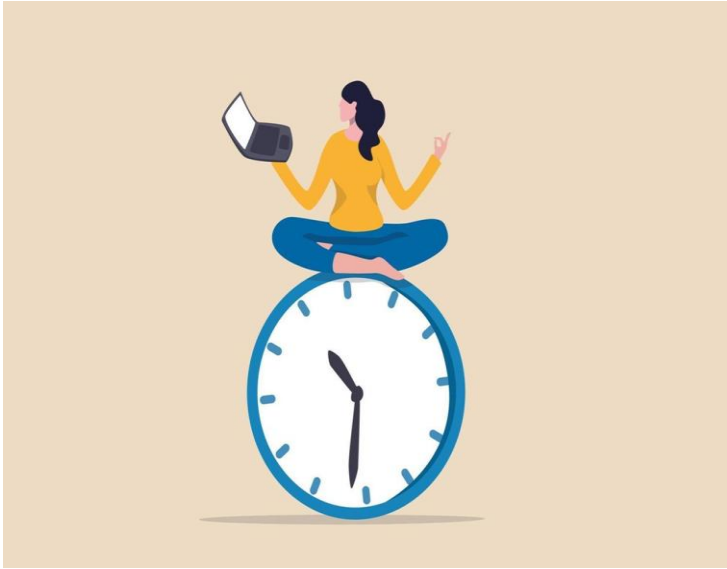


Schedule follow up contact with patient during each contact

Team Dynamics and Morale



Combat burnout and build moral by...



Pinnacle
FAMILY SERVICES



DIMENSIONS of WELLNESS

PHYSICAL

Take care of your physical well-being with movement, healthy food, sleep, and check-ups.



SAMHSA

CONNECT WITH US

Employee Value Proposition
Highlights



Grow With Us

[Check out your latest required Relias training now!](#)

Required training for February focuses on State-required training. Each state will have courses assigned that are specific to State, Payor, and/or Licensing requirements for annual training



Be Well With Us

Did You Know?!

HCA's Employee Assistance Program has a Resource Locator where you can find local resources for local family, aging, and health care providers and services in your area. Results are based on the distance you choose.

[Access the EAP on the Human Resource Center today to get started!](#)



You Belong With Us

Don't forget to submit nominations for PROPS for your fellow coworkers that exhibit outstanding performance (employee goes above and beyond) in all areas of their job including exemplifying the Heath Connect America Mission Statement and our Core Values.

You can submit PROPS Nominations on the [HCA Intranet on the PROPS page!](#)

If you have any questions regarding PROPS, please email:

props@healthconnectamerica.com

How do we incentivize our staff?



Flexible Working:
Working from home
and flexible hours



Professional
Development
Opportunities (Grow
with Us)



Wellness Initiatives
(Be Well with Us)



Employee Recognition



Team Building (You
Belong with Us)



Paid Volunteer Time
(Day of Giving)



Employee Discounts



Monthly Incentive Pay

INCENTIVES







NBCC (National Board of Certified Counselors) CE: Counselors completing this course receive 2 hours of continuing education credit



ASWB (Association of Social Work Boards) ACE CE: Social workers completing this course receive 2 clinical continuing education credits



Trainings are recorded and housed in Relias. Staff do not receive the CEs, but have access to trainings for professional development




The Training Team has a Microsoft 365 SharePoint folder (see next slide)


HCA'S TRAINING AND CLINICAL DEVELOPMENT CENTER!

What is the Training and Clinical Development Center?


This site contains everything training that you might need! If you need to know when a training occurs or if you need to access training materials, this is the site for you. If you need to know about available CE training internal and external opportunities, this site is for you! Please utilize this as your one-stop shop for all things training!


Things you can do here:

 **New Hire Orientation Resources**

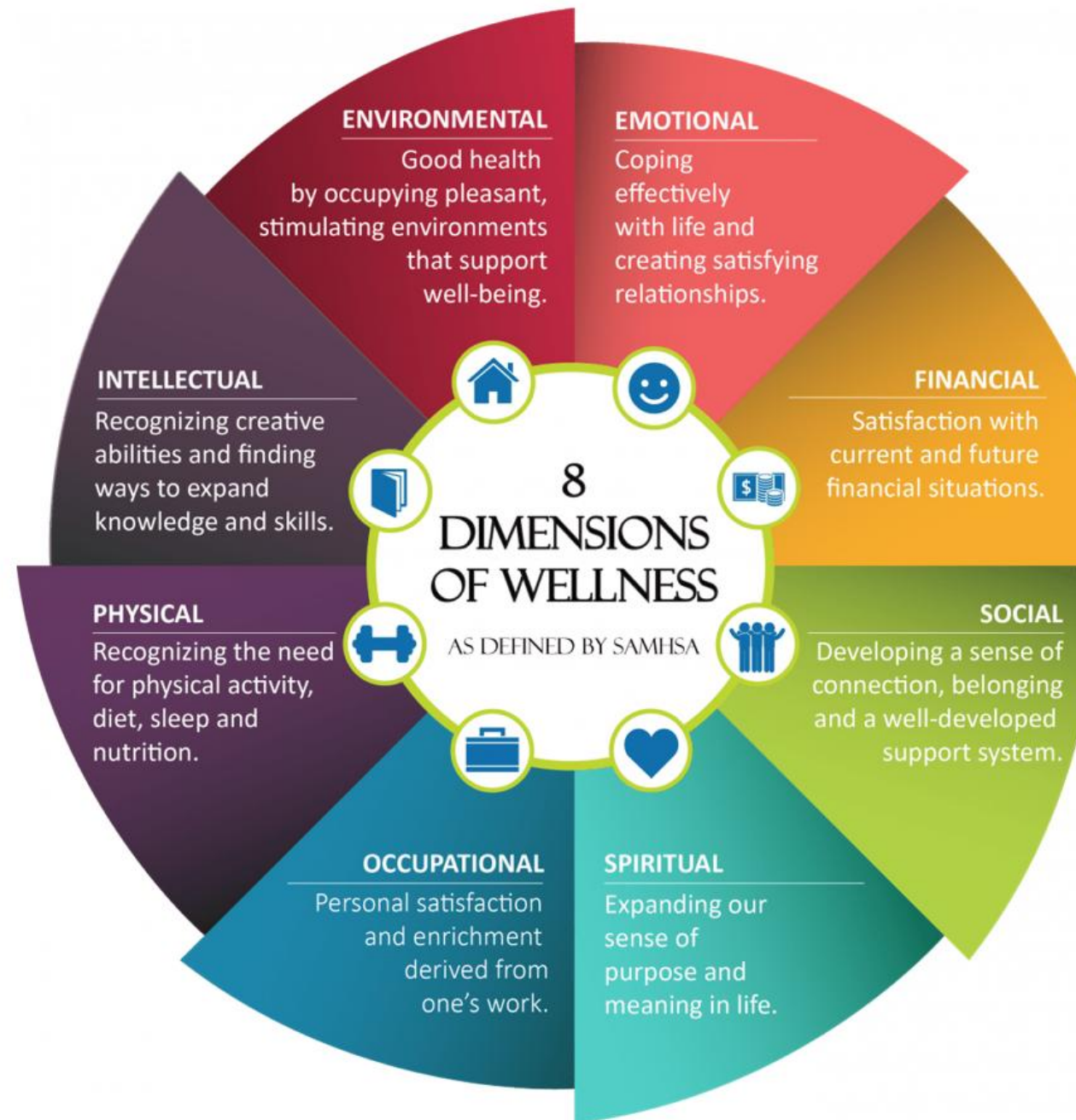
 Join an upcoming event

[? Get help with Relias](#)

 Access training opportunities

 **Access training resources**

SAMHSA's Eight Dimensions of Wellness



A guide for wellness

<https://library.samhsa.gov/product/creating-healthier-life-step-step-guide-wellness/sma16-4958>

The screenshot shows a web browser window with multiple tabs open. The active tab is titled 'Creating x'. The address bar shows the URL: library.samhsa.gov/product/creating-healthier-life-step-step-guide-wellness/sma16-4958. The browser's bookmark bar includes 'Uplifting Ways to Pr...', 'Home | 365', 'Pinnacle Mail', 'Home - Resilient N...', and 'Adobe Acrobat'. The SAMHSA website header features the SAMHSA logo (Substance Abuse and Mental Health Services Administration) and a search bar with the text 'Search SAMHSA.gov'. A navigation menu includes links for 'Find Help & Support', 'Substance Use', 'Mental Health', 'Communities', 'Technical Assistance', 'Grants', 'Data', 'Libraries', and 'About'. A banner for 'Publications and Digital Products' is visible, along with a 'Help' link and a shopping cart icon. Below the banner, there are buttons for 'Start a New Search' and 'View Library'. The main content area is titled 'Creating a Healthier Life: A Step-By-Step Guide to Wellness'. It includes a description: 'A component of SAMHSA's wellness initiative, this handbook defines wellness and presents the eight dimensions of wellness: social, environmental, physical, emotional, spiritual, occupational, intellectual, and financial. It also offers tips for improving oneself in each dimension.' The publication details are listed: 'Publication ID: SMA16-4958' and 'Publication Date: April 2016'. On the right, there is a 'Download' button and a link to 'Creating a Healthier Life: Wellness Guide (PDF | 378 KB)'. The Windows taskbar at the bottom shows the search bar, several application icons, and the system clock indicating 11:57 AM on 1/22/2025.

SAMHSA
Substance Abuse and Mental Health
Services Administration

In Crisis? Call or Text 988 >>

Search SAMHSA.gov Search

Find Help & Support Substance Use Mental Health Communities Technical Assistance Grants Data **Libraries** About

Publications and Digital Products [Help](#)

[Start a New Search](#) [View Library](#)

Creating a Healthier Life: A Step-By-Step Guide to Wellness

A component of SAMHSA's wellness initiative, this handbook defines wellness and presents the eight dimensions of wellness: social, environmental, physical, emotional, spiritual, occupational, intellectual, and financial. It also offers tips for improving oneself in each dimension.

Publication ID: SMA16-4958
Publication Date: April 2016

Download

[Creating a Healthier Life: Wellness Guide](#)
(PDF | 378 KB)

HCA/PFS Wellness Training available to all staff across 8 states



Quarter 1 (January): Emotional & Spiritual

Quarter 2 (April) Physical and Environmental

Quarter 3 (July): Financial & Occupational

Quarter 4 (October): Intellectual & Social





TCM Support and Supervision Meeting
March 20, 2025
Every other Thursday from 10-12 (Virtual)
PFS Core Program Leadership and TCM
Supervisors

Face to Face (f2f) Meetings

March 27, 2025
West End, NC

Team Building
Activities

Door Prizes

Training

Resources

Success
Stories

Employee
Recognition



Building a Child's Calm Down Box

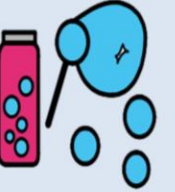
DeVault Clevenger (design); Yetiva Haynes (presenter)
Health Connect America



play dough



bubbles



SENSORY SCAVENGER HUNT

FIVE THINGS I LOVE TO LOOK AT:

FOUR THINGS I LOVE TO FEEL:

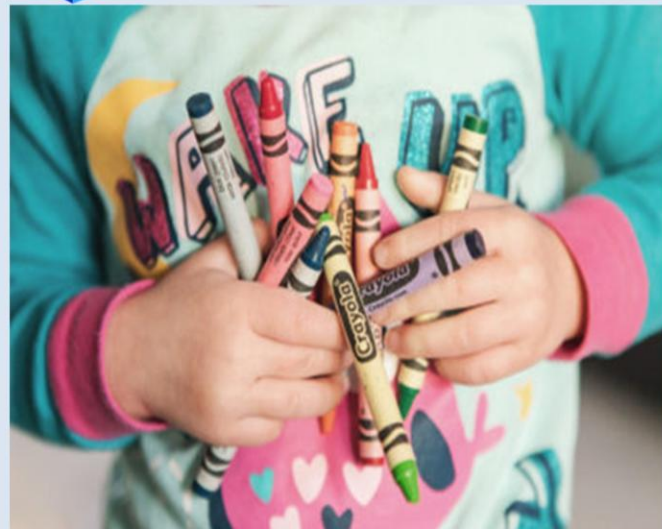
THREE THINGS I LOVE TO SMELL:

TWO THINGS I LOVE TO LISTEN TO:

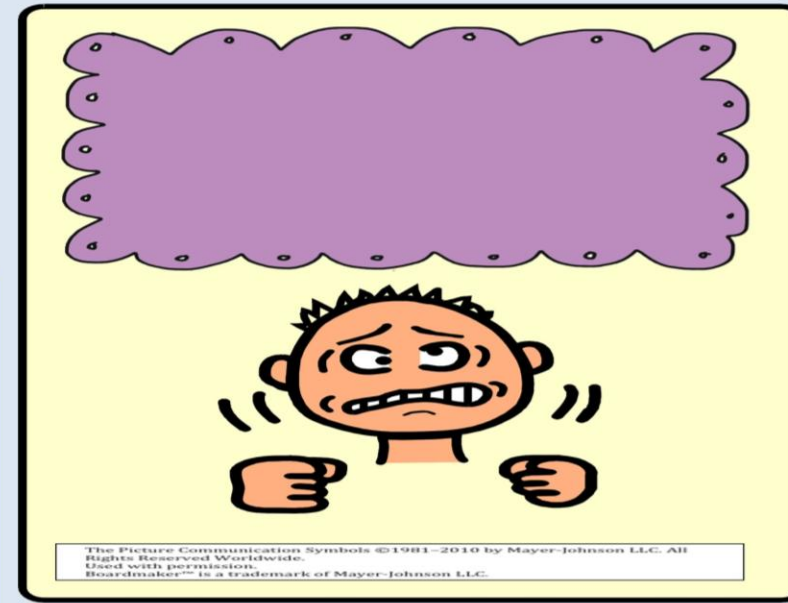
ONE THING I LOVE TO TASTE:

--

Nurture & Thrive



Week 101
TUESDAY TRAUMA AND RESILIENCY TIPS:
CALM DOWN KIT FOR KIDS



How I
Can
Calm



MINDFUL LITTLE CALM DOWN KIT

Take 5 Breathing



MY
CALM DOWN
SPACE

How big is my feeling?



CALM DOWN
KIT

I CAN
choose
HOW TO
respond

Take 5 Breathing
5, 4, 3, 2, 1
5 things you can see
4 things you can touch
3 things you can hear
2 things you can smell
1 thing you can taste

PDF

Acknowledgements

<https://www.mindfullittleminds.com/product/mindful-little-calm-down-kit-pdf/>
<https://nurtureandthriveblog.com/sensory-scravenger-hunt-for-kids/>
<https://goboardmaker.com/pages/picture-communication-symbols>

1.

P.R.O.P.S. Program



INSURANCE

Pet | Legal | Identity Theft Protection | Home/Renters | Auto/Boat

TRAVEL

Air
Hotels
Vacation Packages
Car Rental

Hotels
 Budget
 AVIS Hertz

FOOD

Restaurants
Shopping

GROUPON CityPASS

HEALTH

Health Clubs/Gyms
Weight Loss

Medifast Vitamix
 LASIK Vision Institute Jenny Craig Nutrisystem

ELECTRONICS

Cell Phones
Computers & Tablets
Appliances
TV & Home Theater

DELL Sams Club
 hp Lenovo
 T-Mobile Office DEPOT OfficeMax

EVENTS

Concerts
Movie Theaters
Sports
Theme Parks

AMC THEATRES
 TICKET MONSTER
 GROUPON SixFlags

AUTO

Car Buying
Service & Parts
Car/Truck Rental

employee AUTO BUYING
 jiffylube
 Budget Hertz AVIS



DAY OF
Giving



Discussion

Would you like to provide any additional feedback or insight on your agencies' efforts with:

- **Role Specialization**
- **Flexible Outreach Methods**
- **Team Dynamics and Morale**

Would you like to provide feedback or successful tips that have been helpful with:

- **Data-Driven Practices:**

Data has been used to track engagement rates, balance caseloads, and monitor outreach effectiveness.

Teams leverage analytics to ensure members' needs are met promptly and equitably. Distributing member caseloads to balance difficulty levels. Also, Matching members to care managers based on strengths and experience.

May TCM TAG- Cancellation:

The May TCM TAG is scheduled for May 23, 2025. Due to the upcoming holiday, the Department realizes that this will likely result in a low turn-out of attendees. Are you aligned with cancelling the May TCM TAG (please respond with a "thumbs up, or yes in the chat. If you are not aligned, please raise your hand for further dialogue.

Tailored CM TAG DSC: Assessment and Next Steps

Data Subcommittee Listening Sessions

In November 2024, DHB launched an effort to determine how best to maximize the value of the Tailored CM TAG Data Subcommittee

Stakeholder Engagement Approach
<p>1. DHB sought feedback to inform:</p> <ul style="list-style-type: none"><input type="checkbox"/> Whether to continue the Tailored CM TAG Data Subcommittee meetings<input type="checkbox"/> If the Data Subcommittee is restarted, how best to structure it to maximize its value to stakeholders. <p>2. DHB conducted listening sessions with seven Data Subcommittee Members.</p>

Entity Type	Organization
Tailored Plans	Alliance Health
	Partners Health Management
CINs	Collaborative Health Network
	MediSked
AMH+/CMAs	B&D Integrated Health Services
	Coastal Horizons Center
	Monarch

What Was Shared in the Listening Sessions

The interviewed Data Subcommittee members: (1) affirmed the value of the Data Subcommittee, (2) expressed support for restarting it, and (3) provided specific recommendations for improvement.

1 What aspects of the Data Subcommittee are most valuable?

1. **Learning Forum** – Providing a setting for plans and providers to share information and learn best practices
2. **Roadmap** – Providing a roadmap of milestones and timing that incorporates stakeholders' and the Department's priorities
3. **Informational Updates** – Providing timely notice of upcoming data and technical changes
4. **Problem Solving** – Providing space for workshopping ideas and engaged discussions of potential solutions

2 Should the Data Subcommittee be restarted?

The consensus was that the Data Subcommittee should be restarted.

3 What steps should be taken to improve the Data Subcommittee?

1. Distribute agendas further in advance
2. Improve engagement by leveraging SMEs to support facilitation and live Q&A
3. Use focused discussion questions to encourage meaningful participation
4. Distinguish the value proposition of the Data Subcommittee from other standing meetings

4 How often should the Data Subcommittee meet?

Quarterly, with ad-hoc meetings as needed.

Next Steps

DHB appreciates your feedback and willingness to continue with this effort.

- Based on the surveyed Data Subcommittee members' interest in restarting the Data Subcommittee, DHB proposes to revisit the restart of Tailored CM TAG Data Subcommittee in fall 2025.
- Currently, DHB hosts the TCM Interface Post-Production meetings, Office Hours, and various webinars for TCM providers.
- Additionally, DHB is preparing for the launch of the Child and Family Specialty Plan in *December 2025*.
- Given the various competing priorities for this year, DHB will assess the team's capacity to potentially restart the Tailored CM TAG DSC after Spring 2026.

DHB intends to structure future Tailored CM TAG Data Subcommittee meeting to serve as a productive venue for:

1. Information sharing,
2. Status updates,
3. Engaged, real-time discussion, and
4. Workshopping of data topics and strategy.

Public Comments

Tailored Care Management TAG Meeting Cadence

Tailored Care Management TAG meetings will generally take place the fourth Friday of every month from 10:00-11:00 am ET.

Previous Meetings:

- **Meeting #1:** Friday, October 29, 2021 (presentation, minutes)
- **Meeting #2:** Friday, November 19, 2021 (presentation, minutes)
- **Meeting #3:** Friday, December 17, 2021 (presentation, minutes)
- **Meeting #4:** Friday, January 28, 2022 (presentation, minutes)
- **Meeting #5:** Friday, February 25, 2022 (presentation, minutes)
- **Meeting #6:** Friday, March 25, 2022 (presentation, minutes)
- **Meeting #7:** Friday, June 3, 2022 (presentation, minutes)
- **Meeting #8:** Friday, June 24, 2022 (presentation, minutes)
- **Meeting #9:** Friday, July 22, 2022 (presentation, minutes)
- **Meeting #10:** Friday, August 26, 2022 (presentation, minutes)
- **Meeting #11:** Friday, September 23, 2022 (presentation, minutes)
- **Meeting #12:** Thursday, October 27, 2022 (presentation, minutes)
- **Meeting #13:** Friday, November 18, 2022 (presentation, minutes)
- **Meeting #14:** Friday, December 16, 2022 (presentation, minutes)
- **Meeting #15:** Friday, February 24, 2023 (presentation, minutes)
- **Meeting #16:** Friday, March 24, 2023 (presentation, minutes)
- **Meeting #17:** Friday, April 28, 2023 (presentation, minutes)
- **Meeting #18:** Friday, May 26, 2023 (presentation, minutes)
- **Meeting #19:** Friday, June 23, 2023 (presentation, minutes)
- **Meeting #20:** Friday, July 28, 2023 (presentation, minutes)
- **Meeting #21:** Friday, August 25, 2023 (presentation, minutes)
- **Meeting #22:** Friday, September 22, 2023 (presentation, minutes)
- **Meeting #23:** Friday, October 27, 2023 (presentation, minutes)
- **Meeting #24:** Friday, November 17, 2023 (presentation, minutes)
- **Meeting #25:** Friday, December 15, 2023 (presentation, minutes)
- **Meeting #26:** Friday, January 26, 2024 (presentation, minutes)
- **Meeting #27:** Friday, February 23, 2024 (presentation, minutes)
- **Meeting #28:** Friday, March 22, 2024 (presentation, minutes)
- **Meeting #29:** Friday, April 26, 2024 (presentation, minutes)
- **Meeting #30:** Tuesday, May 21, 2024 (presentation, minutes)
- **Meeting #31:** Friday, June 28, 2024 (presentation, minutes)
- **Meeting #32:** Friday, July 26, 2024 (presentation, minutes)
- **Meeting #33:** Friday, November 22, 2024 (presentation, minutes)
- **Meeting #34:** Friday, January 24, 2025 ([Presentation](#), [Minutes](#))