

POLICY CLARIFICATION #PC000284

CASE MANAGEMENT TRAINING

November 22, 2024

To: Iowa Medicaid Managed Care Plans

This letter is a formal notification of the state's expectations related to the operations and implementation of Iowa Medicaid under the managed care program. This purpose of this letter is to do following:

- Provide formal guidance
- Clarification of existing Iowa Medicaid policy
- Guidance on new process or policy
- Request for information

Community-Based Case Management Training Requirements

Background:

The purpose of this letter is to provide clarification regarding case management training requirements included in Section F.12C.02, Community Based Case Manager Qualifications. These requirements replace the required timeframe in Section F.12C.02 and are designed to ensure that all community-based case managers have consistent training in the foundational knowledge, skills, and abilities to perform their job duties and support members' independent living in community settings.

Policy:

MCOs are required to ensure that all case managers serving LTSS populations hired on or after November 1, 2024, complete an initial Case Manager (CM) Certification within six months of their hire date. MCOs are also required to ensure that existing case managers hired prior to November 1, 2024, complete the required CM Certification, before July 1, 2025. All applicable case managers will be required to complete the CM Refresher, which is a subset of the CM Certification, on an annual basis within 365 days of completion. These training modules are available on the agency-identified learning management system (LMS).

Additionally, MCOs will be required to administer employer-provided case manager trainings for designated training topics. MCOs must provide and document staff completion of employer-provided trainings on the designated topics, listed below, for new hires within their first six months of employment as well as on an annual basis for all case managers serving LTSS

populations. MCOs are required to submit their employer-provided case manager training materials to HHS for review and approval by August 16, 2024, and annually thereafter.

At a minimum, the MCO-administered, HHS-approved training topics for new hires includes the following:

- Sub-population specific needs, challenges, and resources based on caseload composition including:
 - I/DD
 - Older adults
 - Children
 - Behavioral health
 - HIV/AIDS
 - Chronic health conditions

At a minimum, the MCO-administered, HHS-approved training topics for all case managers, including new hires, includes the following:

- Motivational interviewing and basic counseling skills
- Cultural competency
- Setting boundaries and staying safe in the field
- Care plan documentation
- Care coordination
- Completing environmental assessment and working with members in their homes

Provision of the case manager training requirements detailed in this policy clarification must be consistent with and are in addition to related requirements within MCO contracts or the Iowa Administrative Code.

MCOs must also ensure subcontracted case managers providing support to the community-based LTSS populations (such as IHHs) also adhere to all training requirements.

Related Policy Clarifications:

This policy clarification should be used in correlation with the following policy clarifications: None

This formal guidance impacts capitation rates in the following manner:

- This [is was] an Iowa Medicaid practice prior to April 1, 2016 and was included in the experience used to develop the capitation rates.
- This is a new process or policy that does not have a fiscal impact.
- This is a new process or policy that will be reflected in revised capitation rates and implemented July1, 2021.