**JOB AID ON ENTERING MI VIA AND SUPPORTS WAIVER PARTICIPANTS
IN THE NM WAIVER TRAINING HUB**

You must be either a "Mi Via Consultant" or "Supports Waiver Coordinator" and have a login and password for this role to enter participants. If you do not have this job classification, please contact the Hub via email.

This job aid shows the basic process of entering a participant. The same screen is used for all of three of these situations:

- Case one: all services are provided by people hired directly by the participant with the assistance of the EOR.

- Case two: all services are provided by vendors/provider agencies with which the participant and the EOR have contracted. The participant and the EOR have not hired anyone directly.

- Case three: services are being provided by a mixture of people (a) hired by the participant/EOR and (b) employed by an existing provider agency.

> Note: if a participant leaves your agency, or your agency starts providing consultant/coordinator
> Services to a participant that was formerly somewhere else, please contact the Hub so we can update the
> participant's record.

January, 2024

CDD-NMWaiverTrainingHub@salud.unm.edu

THE BASICS

Here is the basic screen used to enter participants. Note that your name has already been filled in. (It will show SW Coordinator if that's your role). If you have both roles, you'll be able to change from one waiver to the other using the dropdown carrot to the right of "Consultant".

All of the boxes with a red asterisk (*) are required. Please make sure you have this information before you begin.

When you've entered the basic information, hit the "save" icon (the blue disc on the upper left corner). A popup box will appear letting you know that the participant has been entered and the person has been sent to pending web changes at the Hub.

The boxes at the bottom where you'll enter people providing services to the participant will appear. Please read the rest of the job aid to learn how to enter service providers in the three cases listed on the first page of this job aid.

Note that the participant and the EOR – who you entered when you began (see the page above) have already been entered.

If a service provider stops providing services, please go to the participant and put in a "left date" to the right of the person.

CASE ONE: ALL SERVICES ARE PROVIDED BY PEOPLE HIRED DIRECTLY BY THE PARTICIPANT WITH THE EOR

Mr. TheGray and his EOR have hired all service providers directly; no vendor/provider agencies are involved. In this case, all service providers (in this case PT and Respite) are entered in the Service Provider table at the bottom.

		CENTER FOR DEVELOPMENT & DISABILITY			Data Screens ▶ Reports ▶ Maintenance ▶ Change Password **SELF DIRECTED PARTICIPANTS AND SERVICE PROVIDERS**			

Gandolf TheGrey   Inactive: ☑

Participant	*	TheGrey	, Gandolf	**Last 4 SSN:** 1223	
EMail			**Phone:**		
Region	*	Metro			⌄
Waiver	*	Mi Via			⌄
EOR	*	Greiff	, Robert		
EMail	*	rlgreiff@wizard.net		**Phone:** (505) 123-4567	
Consultant 🔍	*	Cahill, Anthony (Center for Development and Disability)			⌄
EMail		acahill@salud.unm.edu		**Phone:** (505) 272-2990	
Comments					

.... Find Participant .... ⌄

○ Active   ◉ All

Add Participant

Delete Participant

◉ Active Only   ○ All

	DDSD ID	**Service Provider (Click to Select)** ⌄	**EMail**	**Phone**	**Position**	**Date Hired**	**Date Left**	**Comply**
✏ ✖	CAH-AN-8031	Cahill, Anthony	acahill@salud.unm.edu	(505) 272-2990	Mi Via Physical Therapist	5/1/2022		X
✏ ✖	GAL-CL-4670	Galloway, Clint	crgalloway@salud.unm.edu	(505) 272-0286	Mi Via Respite	10/1/2022		X
✏ ✖	GRE-RO-1234	Greiff, Robert	rlgreiff@cinderalla.org	505-555-1234	Mi Via Employee of Record (EOR)	10/31/2022		X
✏ ✖	THE-GA-1223	TheGrey, Gandolf			Mi Via Participant	10/31/2022		X
⊕🔍	AAA-AA-####	Last Name , First Name			⌄			

CASE TWO: ALL SERVICES ARE PROVIDED BY VENDORS/ PROVIDER AGENCIES WITH WHICH THE PARTICIPANT AND THE EOR HAVE CONTRACTED. THE PARTICIPANT AND THE EOR HAVE NOT HIRED ANYONE DIRECTLY.

Mr. Luther and his EOR have contracted with two agencies to provide services. They have not hired anyone directly. Because the agency has hired the person or people providing these services, they have already been entered in the Hub by their agency. In this case, the vendors/provider agencies are entered into the comment box and are not entered in the Service Provider box. Only the participant and the EOR are listed in the Service Provider table.

UNM CENTER FOR DEVELOPMENT & DISABILITY

Data Screens ▸   Reports ▸   Maintenance ▸   Change Password

SELF DIRECTED PARTICIPANTS AND SERVICE PROVIDERS

Lex Luther   Inactive: ☑

Participant *	Luther , Lex	Last 4 SSN: 1223
EMail		Phone:
Region *	Metro	
Waiver *	Mi Via	
EOR *	Greiff , Robert	
EMail *	rlgreiff@wizard.net	Phone: (505) 123-4567
Consultant 🔍 *	Cahill, Anthony (Center for Development and Disability)	
EMail	acahill@salud.unm.edu	Phone: (505) 272-2990
Comments	Physical Therapy services are being provided by Finnegan PT New Mexico, LLC. Respite Services are being provided by Sweeney Respite Services, Inc.	

.... Find Participant .... ⌄
○ Active   ⦿ All

Add Participant
Delete Participant

⦿ Active Only ○ All

	DDSD ID	Service Provider (Click to Select) ⌄	EMail	Phone	Position	Date Hired	Date Left	Comply
✎✗	GRE-RO-1234	Greiff, Robert	rlgreiff@cinderalla.org	505-555-1234	Mi Via Employee of Record (EOR)	10/31/2022		X
✎✗	LUT-LE-1223	Luther, Lex	Lex@superman.net		Mi Via Participant	10/31/2022		X
⊕🔍	AAA-AA-####	Last Name , First Name			⌄			

NOTE:
ALL participants and EORs, including those who have only contracted with vendors/provider agencies, must be entered in the Hub.

CASE THREE: SERVICES ARE BEING PROVIDED BY A MIXTURE OF PEOPLE HIRED BY THE PARTICIPANT AND EMPLOYED BY AN EXISTING PROVIDER AGENCY

Mr. Baggins and his EOR hired Anthony Cahill to provide nursing services. This is entered in the Service Provider table at the bottom.

Mr. Baggins also contracted with the vendor/provider agency Employment Services, LLC for employment support services. Because the agency has hired the person or people providing these services, they are already in the Hub. They should not be entered in the Service Provider table, but this information should be noted in the "Comments" box.