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A. Log in to Your Account

1. Log in to your account as you usually would.

2. Use the Login Name and password previously provided to you.

3. If you do not have a “Login Name or password” and you are employed with the agency, please contact your agency to assign it to you.

4. If you do not have a “Login Name or password,” and you are a Therapist, CM, RD, or BSC, please contact your Regional Therap Lead, Kathy Baker @ Kathy.Baker@state.nm.us, or Hernando Martinez @ Hernando.Martinez@state.nm.us to assign you one. Please have your caseload ready when contacting them or send it via email before your call.

5. All Therapists, BSCs, RDs, and CM, must inform Kathy Baker, Statewide Provider Administrator, or Hernando Martinez, Statewide Provider Administrator of any caseload changes within seven (7) calendar days.
B. Finding the Questionnaire-CARMP Draft

1. After logging on, the page below should be your landing page. If this is your landing page, please ignore number (#) two (2) to four (4) and continue to # (five) 5. If you see a different landing page, please follow the directions in # 2 – 4 then continue.

![Landing Page Screenshot]

2. If your landing page is different than what is depicted above, it may look like the picture below. If it looks like the picture below, you must first choose your provider before you can continue. Please click on “Switch Provider.”

![Switch Provider Screenshot]
3. After clicking on “Switch Provider,” this page will open that will allow you to choose your provider by typing the provider name in the search box; see below.

4. When your provider is identified, you click on the name, and the landing page in #1 will open.
5. Click on “Individual,” then scroll down to the bottom of the page to find the “Questionnaire Forms.”
6. In “Questionnaire Forms,” you will find “CARMP DRAFT”. Click on “Search” to open the search page.

7. On the search page, please enter the person’s name and click “Search.”
8. The next page will open with your search results. When you located your person click in the area with the person’s information to open the page where the draft CARMP is located.

9. On this page, you have two options. You can either download the draft CARMP by clicking “Download”; or click on “Open” to open the “Popup,” which is the Questionnaire, then download the draft CARMP.
C. Returning to Original Landing Page

1. When done working with the CARMP and are ready to go back to your original landing page to send the SCOMM, click on “Switch Provider.”

![Image of Therap's Switch Provider page]

2. After clicking on “Switch Provider,” this page will open that will allow you to choose your provider by typing the provider name in the search box; see “1” below.

![Image of Switch Provider search results]

3. Choose “DOH-DDSD” to return to your original landing page, see “2” above.
D. Downloading the CARMP

1. You can either download the draft CARMP by clicking “Download”; or click on “Open” to open the “Popup,” which is the Questionnaire, then download the draft CARMP. See numbers 6 and 7 above under Finding the CARMP Draft.

2. By clicking on “Download,” the CARMP document will open.

3. At this time, save the CARMP to your computer. When saving the document, maintain the same name but add your discipline initials such as “RN, SLP,” etc. This will ensure continuity, and everyone can see at first glance who completed work on the CARMP by looking at the document. The CM can revert to the original name before adding the date and submitting it.

4. Review and revise the CARMP then save it to your computer again. You do not have to add the date of your revision. The case manager will add the date when the CARMP is completed.

5. If you do not have any recommendation to add, you can continue to section D #7, close all pages without changing anything, and sign out of Therap. Please let the team know via SCOMM that you do not have anything to add to this CARMP.

6. If you think about something to add later, please do not go back and add something without communicating with the team because entries will be lost if two people work on the CARMP at the same time. You will have to wait until the case manager notifies you that you can go back in to enter new recommendations.

7. If you choose “Open” instead, the “Popup” will open, which is the Questionnaire.
8. In the Questionnaire, you have an option to download the CARMP as well.

9. You are clicking on “Download” next to the document name to download the CARMP to your computer. The CARMP document will now open.

10. Save the CARMP to your computer before you continue to review and add your recommendations because if anything happens, you will have a copy saved. When saving the document, maintain the same name but add your discipline initials such as “RN, SLP,” etc. This will ensure continuity, and everyone can see at first glance who completed work on the CARMP by looking at the document. The CM can revert to the original name of the document before adding the date and submitting it.

11. Therap may timeout while you are working on the CARMP, which means you will have to log on again. The CARMP will not be lost because it will remain in Therap until it is manually deleted, and you previously saved it to your computer.

12. Continue to periodically save your work as you update the document, especially when you are done adding recommendations to the CARMP.
E. Attaching the CARMP to “Questionnaire Forms.”

1. A CARMP template or the current CARMP must be uploaded to the “Questionnaire-CARMP Draft” by the primary agency. Uploading the template or current CARMP can be done by an office administrator working for the primary agency.

2. Follow all the steps from A to B # 7 until you reach this page, see below.

3. When you located your person click in the area with the person’s information. The page will open where the draft CARMP is located. If you previously downloaded and reviewed and revised the CARMP, the attached version is now old. Before continuing, click on “Open.”
4. After clicking on “Open,” the “Popup” will open, which is the Questionnaire.
5. When the Questionnaire opens, it defaults to question 1. Question 1, hold the old attached CARMP, or if this is the first time attaching the CARMP, there will be no attachment.
6. If this is the **first time a CARMP** is to be attached to the popup, the only options are “Add File or Scan File,” see below.

   i. The first step is to “**Add File.**”
   
   ii. You will retrieve the previously saved CARMP on your computer. Suggested names to save this CARMP to your computer will be the person’s name followed by draft, and your professional discipline abbreviation, e.g., SLP/RN/BSC/CM/etc.
   
   iii. Next, click on “**Add File**” and follow the prompts to attach the CARMP to this popup. Please ensure this is the correct CARMP with your new recommendation.
iv. After the CARMP is attached, click on either “Save or Save and Next.” **If you do not click on either “Save or Save and Next,” the CARMP will not remain attached.**

a. By clicking “Save,” you just saved the attachment, and now you can click on the next question to move forward.

b. By clicking “Save and Next,” you saved the attachment and then move to question 2.

c. Click on the question appropriate to your professional discipline, add your name, click “Save” or “Save and Next.”

d. You are now ready to close the “Popup,” which is the Questionnaire.

7. If the CARMP is already attached, there will be a file name with the following options “Delete Answer, Save, and Save and Next,” see below,
i. The old CARMP that you previously downloaded must first be deleted before the newly revised CARMP can be uploaded/attached.

ii. **It is important that only one person works on the CARMP at any given time.** If two or more people work on the CARMP at the same time, only the person who attached the CARMP last will have new recommendations in the CARMP; all other recommendations would be lost.

8. Start by clicking on “Delete Answer” this will delete the previously attached CARMP and allow you to attach the CARMP with your recommendation. There is no warning for this deletion at this time. Please make sure you want to delete this CARMP because once deleted; it cannot be retrieved.

9. After the CARMP was deleted from the Questionnaire, you now have the option to attach a file, see below.

   ![CARMP Attachment Screen](image)

   i. Click on “Add File” to attach the CARMP with your new recommendations from your computer. Please do not leave without attaching the new update CARMP!

   ii. Follow the prompts to attach the CARMP then click on either “Save or Save and Next.” **If you do not click on either “Save or Save and Next,” the CARMP will not remain attached.**

   iii. By clicking “Save,” you just saved the attachment, and now you can click on the next question to move forward.
iv. By clicking “Save and Next,” you saved the attachment and moved to question 2.

10. Click on the question appropriate to your discipline, add your name, click “Save” or “Save and Next.”
11. You are now ready to close the “Popup,” which is also the Questionnaire.
12. Click on “Close Popup,” see below. Do this only if you are sure that all your work had been saved and CARMP is attached.

13. After you clicked on “Close Popup,” the following message will be displayed. Click on “Ok” to close the Questionnaire, see below.
14. The CARMP DRAFT page will be displayed as “In Prep.”
15. Click on “Save” to ensure your work is saved.
16. **Do not click “Submit” because this will finalize the document.**
17. The last person working on the CARMP, which should be the Case Manager will add the date and submit the CARMP.

18. After saving the page, a confirmation message will be shown.

19. The next person (Therapist, RD, BSC, or CM) can now be notified, via SCOMM, that you are done, and they can start their review.
   i. It is up to the team who should be notified and when; the entire team or only the next person and the case manager.
   ii. The case manager should be notified after each person so that they are aware of the progress.
   iii. Please use SCOMM to make the notifications.
20. The **Case Manager adds the date** after reviewing the CARMP for inconsistencies and with the person and guardian. The **Case Manager will then submit the CARMP**.

21. After the CARMP was submitted, the following page will be seen.

![CARMP 1.0](image)

22. After the CARMP was submitted, the Case Manager will notify the team, via SCOMM, that the CARMP had been finalized.

23. The team will then download the finalized CARMP and assure it is available where the person eats and drink.

24. The nurse will upload the CARMP to Therap.
F. Starting a New Draft CARMP Session

1. After logging onto Therap, the page below should be your landing page. If this is your landing page, please ignore number (2) to four (4) and continue to (five) 5. If you see a different landing page, please follow the directions in # 2 – 4 then continue.

2. If your landing page is different than what is depicted above, it may look like the picture below. If it looks like below, you must first choose your provider before you can continue. Please click on “Switch Provider.”
3. After clicking on “Switch Provider,” this page will open. This page will allow you to choose your provider by typing the provider name in the search box; see below.

<table>
<thead>
<tr>
<th>Provider Name</th>
<th>Provider Code</th>
<th>Provider Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOH-DDSD</td>
<td>DD8D-NM</td>
<td>State Oversight</td>
</tr>
<tr>
<td>A New Vision Case Management, Inc.</td>
<td>ANV-NM</td>
<td>Case Management Provider</td>
</tr>
<tr>
<td>A Step Above Case Management</td>
<td>ASA-NM</td>
<td>Case Management Provider</td>
</tr>
<tr>
<td>Advocates of New Mexico, LLC</td>
<td>ADVNM-NM</td>
<td>Case Management Provider</td>
</tr>
<tr>
<td>Amigo Case Management, Inc.</td>
<td>ACM-NM</td>
<td>Case Management Provider</td>
</tr>
</tbody>
</table>

4. When your provider is identified, you click on the name, and the landing page in #1 will open.
5. Click on “Individual,” then scroll down to the bottom of the page to find the “Questionnaire Forms.”
6. In “Questionnaire Forms,” you will find “CARMP Draft”. Click on “New” to start a new session.

7. Find the person and click on their name.
8. The CARMP Draft page open for your chosen person. Click on “Open.”

9. After clicking “Open,” a “Popup” will open, which is the Questionnaire.
10. When the Questionnaire opens, it defaults to question 1. Question 1 is where the CARMP will be attached.
11. The only options at this time are “Add File or Scan File,” see below.
12. Click on “Add File.”
13. Follow the prompts to attach the CARMP from your computer to Question 1.
   i. Retrieve the previously saved CARMP.
   ii. Please ensure this is the correct CARMP with your new recommendation.
   iii. Suggested names to save this CARMP to your computer will be the person’s name followed by draft and your professional discipline abbreviation, e.g., SLP/RN/BSC/CM/etc.
   iv. If you follow someone else, do not change the file name, just add your professional discipline abbreviations to the name.

14. After the CARMP is attached, click on either “Save or Save and Next.” **If you do not click on either “Save or Save and Next,” the CARMP will not remain attached.**
   e. By clicking “Save,” you just saved the attachment, and now you can click on the next question to move forward.
   f. By clicking “Save and Next,” you saved the attachment and move to question 2.
15. Click on the question appropriate to your professional discipline, add your name, click “Save” or “Save and Next.” You are now ready to close the window.

16. Click on “Close Popup.”
17. The following message will be displayed after you clicked on “Close Popup.” Click on “Ok” to close the Questionnaire.

18. The CARMP Draft page will be displayed as “In Prep.”
19. Click on “Save” to ensure your work is saved.
20. **Do not click “Submit” because this will finalize the document.**
21. The last person working on the CARMP, which should be the Case Manager will add the date and submit the CARMP.
22. After saving the page, a confirmation message will be shown.

23. The next person (Therapist, RD, BSC, or CM) can now be notified via SCOMM that you are done, and they can start their review.

24. When the lead contact/author finishes their revisions/recommendations, they must notify the CM via SCOMM. Other team members may also be notified at the same time.

25. After the CARMP was revised by all the lead contacts/authors, the CM will review it for any inconsistencies and missing recommendations with a Lead Contact identified. If any inconsistencies or missing recommendations are found, the CM will notify the team to review it and correct any inconsistencies and missing recommendations according to the timeline set by the CM.

26. The CM will review the completed CARMP with the person and guardian. If no revisions are needed, or after all revisions were completed, the CM must add the date to the CARMP, attach it to the “Questionnaire-CARMP Draft” in Therap, and submit it.

27. After the CARMP was completed and the CM added the date and submitted it, the CM must notify the team via SCOMM.

For Therap related questions please contact your Regional Therap Lead, Kathy Baker @ Kathy.Baker@state.nm.us, or Hernando Martinez @ Hernando.Martinez@state.nm.us. Please have your caseload ready when contacting them or send it via email before calling.

For any other questions, please contact your regional office or the Aspiration Risk Management Coordinator at any time.

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