

1. Preparation and Scheduling for the Visit

- You will be assigned visits by your Regional Office Director (or the LMB Bureau Chief if you are in the Metro Region). Supervisors are expected to make your identified staff available to Regional Directors for assignments.
- If you have questions about Staff assignments, please work directly with the respective Regional Director or LMB Bureau Chief (for ABQ LMB Staff).
- DHI QMB Staff will complete wellness visits as part of their ongoing survey process.
- DHI IMB Staff will complete wellness visits as part of assigned ANE investigations.
- DDSD wellness visits are to be announced and scheduled.
- When calling to schedule a visit verify the participant’s current home address and directions. If the address is different than what is in the Individual Data Form (IDF), please update the IDF in the oversight account (if you need assistance with this, please work through your supervisor and the Bureau of Systems Improvement).
- Review the case history and individual’s plan prior to the home visit so you have an awareness of the type of support the individual requires and so you have an awareness of the type of environment you are visiting (example: an individual may have significant behavioral challenges).
- Review the most recent General Event Reports, specifically to determine if anyone in the home has recently contracted COVID-19 or had an exposure to COVID-19. If the answers to these questions are Yes, you may consider rescheduling the visit until such time the home is COVID-19 free or individuals in the home no longer have symptoms. You can also elect to continue with the visit wearing personal protective equipment.
- Ensure you know the details of your participant, i.e., location, spoken language, etc.
- Assess the area prior to the home visit and work in pairs if the neighborhood has experienced elevated crime levels or frequent law enforcement involvement.

Translation Services

Language Line Solutions

Dial in phone # 866-874-3972

CID: 522661 (Number to provide to Language Line when you call)

Over 240 languages

- Ensure you have a state issued identification to share with the participant. i.e., agency badge and/or business card. In addition, make sure to have DHI-IMB reporting cards with you during your visit. Please make sure and provide the DHI-IMB reporting card to the participant or their support if they do not know how to report abuse, neglect, or exploitation.
- Make sure to have a mask with you in case you are requested by the individual, family, or DSP to wear a mask during the visit.
- Make sure to check the weather and road conditions prior to your scheduled visits.
- Make sure your calendar reflects your location and visit details. Include contact information, date, and time of visit, and when you expect to return from the visit.

- Confirm Regional Director, LMB Bureau Chief or Deputy Director on-call contacts when you are in the field, including after hours and weekends, so that you can get an immediate response if needed.
- Do not schedule visits before 8:00am or after 7:00pm. Please try and schedule visits during weekdays; weekend visits should only be scheduled if requested by the participant or their family.
- Staff **are not required** to complete weekend visits.
- Dress professionally and wear comfortable shoes.
- Put any important or valuable items in the trunk of the car before arriving for the visit. Avoid carrying and wearing expensive items.
- Park in well-lit areas. Know your surroundings and exits if needed.
- Visits must occur in the participant's home.
- If staff work outside of their normal scheduled hours staff should flex their time. If that is not possible, staff should get prior approval for overtime from their direct supervisor.
- Use state vehicles when feasible. Mileage reimbursement for personal vehicles will only be considered if state vehicles are not available.
- If your visits require extensive travel, please work with your supervisor to see if overnight stays are necessary. Please complete TATR and ISTE forms and submit them to your supervisor for approval.

2. Arriving for the Visit

- Upon arrival at each visit, introduce yourself, show your identification, and explain that you are visiting to ensure the health and wellness of people supported by DOH. **Please make sure to have your state issued badge. Individuals, families, or Staff can refuse to allow you to visit if they cannot verify your identity.**
- If someone wants to verify your identity or role with their supervisor, allow them to identify you and wait patiently. They are doing their job and it's an additional safeguard.
- If the individual, family, or DSP request that you wear a mask during the visit, please respect their wishes and wear the mask throughout the visit. If you do not have a mask and they don't want you to complete a visit without one, you will need to reschedule and come prepared for the next visit.
- Please wait to be invited into the home, either by the individual, family, or Staff.
- Keep a clear path to the door. Know your means of exit. You may leave from a way different than the way you came in.
- Organize belongings so you do not have to take time to search for them. For example, when you arrive for a home visit, you should have your keys and cell phone in hand.
- Always be alert to your surroundings when you arrive for the visit. If you feel something is not right or see something in the home, neighborhood, or surrounding area that makes you uncomfortable. Trust your instincts, don't proceed with the visit.
- IF YOU FEEL UNSAFE FOR ANY REASON upon arrival or during the visit (EVEN IF IT IS A FEELING), WALK AWAY, DON'T COMPLETE THE VISIT.**

3. During the Visit

- Once you are welcomed into the home. Always be polite, courteous, respectful, and professional. You are in the person's home, respect their space.
- Direct your conversation and questions to the individual. Follow the lead of the individual and allow them to determine how much they want to engage.
- If the individual is non-verbal, ask the Staff if they have a communication device in which you can communicate.
- If the individual chooses not to engage, or wants to limit the interaction, that is perfectly fine, direct your attention to the family or Staff, always keeping in mind to not lose sight of the purpose of your visit, the focus is the individual.
- Always be alert to the individual's response to your visit, their behavior, body language, verbal, and non-verbal cues. If something looks or feels off, it probably is, error on the side of caution. Rely on the expertise of the Staff in the home.
- Engage the individual, family, and/or Staff in a conversation versus just asking a series of questions. Try to make the visit as comfortable as possible.
- Ask the individual, family, and/or Staff if they will give you a tour of the home to include indoors and outdoors. If the individual chooses to allow you access to only part of the home, that is OK, follow their lead.
- During the tour of the home observe the appearance of the home and note any concerns with the environment. Is the home clean and accessible to the person? If the person has a wheelchair, are the hallways and doors wide enough to accommodate the wheelchair, is the bathroom accessible including the tub/shower area, any obvious safety hazards, is temperature appropriate, does the home have an odor, etc.?
- Once the tour of the home is complete, ask the individual, family, or Staff if they have adequate food in the home. If the individual is comfortable opening the refrigerator, freezer, and pantry to show you what food is in the home, please be respectful as you look, knowing that this part of the visit can feel very intrusive. If the individual does not feel comfortable opening their refrigerator, freezer, or pantry, that is OK, do not press the issue. Ask follow up questions, such as what did you eat for lunch? When was the last time you went grocery shopping? What types of items did you buy? Again, trying to obtain the answers to these types of questions through more of a conversation than rapid fire question and answer. Also be aware that this will vary by home and individual. Some individuals do not receive anything by mouth, may receive their nutrition and hydration through G or J-Tubes, so the amount of food in the home may be limited.
- Throughout the visit ask questions to try and determine if the individual is going out in the community versus staying isolated at home. Do they have access to transportation? Is transportation available when needed, etc.? Do they have access to their money when needed to do things they like in the community? What kinds of things do you like to do in the community? Do you visit with friends, family, etc.?
- Throughout the visit ask the individual about their overall services. Are they satisfied with services, do they have concerns, is there something they need that they don't have, can their services be improved, if so, how?
- Throughout the visit observe the individual as best you can, specifically looking for any obvious signs of potential abuse, neglect, and/or exploitation, such as unexplained cuts,

bruising, open sores, note the general appearance of the individual-how is their coloring, do they look emaciated, emit a strong odor, how is their hygiene, is the clothing appropriate for the season, do their clothes fit correctly? etc. REMEMBER. You are not to complete or attempt a head-to-toe assessment. DO NOT ask anyone to pull up their clothes to show you their arms, legs, back, or mid-section. Observe what you can during the visit.

- Ask the Staff, family, supports in the home if they know how to report abuse, neglect, or exploitation. If they say No, provide them with the DHI-APS reporting number (1-866-654-3219).
- If you feel something is not right during your visit (e.g., physical, or verbal violence, alcohol/drug use, evidence of firearms, or the presence of an acutely intoxicated individual or feeling uncomfortable, trust your instincts.), leave, if necessary.
- Inform the participant that, "Maybe this isn't a good time for a visit. Let's reschedule." Before going on future visits, talk to your supervisor to address any safety concerns.
- IF YOU FEEL UNSAFE FOR ANY REASON (EVEN IF IT IS A FEELING), WALK AWAY, DON'T COMPLETE THE VISIT.**

4. After the Visit

- Report anything that needs immediate attention to your supervisor.
If applicable:
Call DHI IMB/APS at 1-866-654-3219 to file an ANE, if indicated.
Call 911, if indicated or if there is imminent danger.
- Document your visit in Therap. All Therap entries must be completed within one business day of your visit.
- One Therap entry must be completed per recipient in the home.
- File a RORA if necessary.
- Consult your Regional Office Director and/or supervisor with questions.