Case Manager/Agency Picks up Referral – REVISED (Chapter 10)

1. In the **My Work** chapter, under the **Participants** column, in the **CMA/Service Provider** panel, click Clinically Eligible

2. Click on the row to open the participant's record

3. Click on the CMA/Service provider row to open the record

4. To change the Case Manager, click on **CMA/Service Provider Workers** on the left side menu. The list of any assigned workers is shown.
    a. From the **File** menu, select **Assign CMA/Service Provider Worker**
    b. In the new window that pops up, click the **Lookup** next to **Worker's Name**
    c. Type at least the first 3 letters of the worker's last name and click **Search**
    d. Click on row with the name of the worker to select
    e. From the File menu, select **Save and Close Referral Worker**
        - This returns to the **CMA/Service Providers Worker** page

5. On the **CMA/Service Provider Workers** page, the list of assigned workers is shown with the newly added worker
    a. On the line with the newly added worker, click the (unmarked) box on the right at the end of the row
    b. From the **Tools** menu, select **Designate as Primary**
        - This makes the selected worker the primary worker
    c. From the **File** menu, select **Close CMA/Service Provider Worker**
        - The window will close and return to the Participant record

Note: Once the case manager receives the referral, the case manager **MUST** change the disposition from **Clinically Eligible** to **Open** and change the **Referring Worker**.

- On the **CMA/Service Provider** page, change the **Disposition** drop down from **Clinically Eligible** to **Open**. Then, click **File, Save and Close**.
    - On the **CMA/Service Provider** page, click **Lookup** next to **Referring Worker**
    - In the **Search Text** box, enter the current case manager last name (at least three letters)
    - Click **Search**
    - From the names that return, click on the correct name
    - Click **File, Save and Close CMA/Service Provider**

To End Previous Worker

6. From the list of assigned workers, click on the worker assigned prior to the worker just added.

   a. A new window will pop up with the name of the previous referral worker’s name. Enter an **End Date** in the box.
   b. **Uncheck** the box next to **Active**.
   c. Click **File, Save and Close Referral Worker**

Case Manager Introduction Letter

When the CMA/Service Provider page is set to Disposition of Clinically Eligible, a workflow wizard (WFW) will fire to remind the Case Manager to send the Introduction letter and make the 1st Phone call.

1. Click **Ticklers** menu while in the Participant's record

   Tip: Ticklers can be accessed via the **My Work** chapter.

   Tip: Letters can also be found by going to Demographic tab and clicking Word Merge hyperlink (to right of File)

2. Click the first tickler, titled "Send Case Manger Introduction Letter"

3. When a letter is run the preview will display in the middle of the screen, but a downloaded word version of the letter will also automatically be available when you click the word icon in the lower right-hand corner of the window. You will also notice that certain data points that were entered in the appointment details are displayed in the details of the letter.

   Note: **Be sure your letter is on your agency letterhead!**

4. In order to edit the letter so that it is on your letterhead, select **Open Document** and make the changes

5. When you have the finished letter, click **Upload and Save to Note.**
   a. **Note Type** will default to Other**,** Change it to **'Documentation'**
   b. Set **Note subtype** equal to **Letter**
   c. The Description will default to Word Merge Template. Update this with **Introduction Letter [DATE]**
   d. Set Status equal to **Complete**
   e. From the **File** menu, select **Save and Close Notes**

Phone Contact Attempt

1. Click the second tickler, titled **Make 1st Phone Contact Attempt** (or find under **Assessment/Forms Tab**)
   a. Select **Contact Form**

   b. Follow instructions below

2. Record the outcome of the 1st Phone Contact
   f. Set **Review** to **Initial**

g. Review Date defaults to “Today’s Date”
h. OpenClose defaults to **LTSS**
i. Worker defaults to current worker
j. Leave Assessment/Form Status in **Draft** until the form is filled out. Then change status to **Complete**
k. Set the Agency/Program to **BHDDH/IDD/HCBS**

If Contact Attempt is Successful:

1. Set **Attempted Contact** Outcome equal to **Contact Successful**
2. Set **Type of Contact**
    a. Equal to **Initial** (Only chose for Initial PCP meeting) if the participant is a *new participant with no plan and new to DD services*.
    b. Equal to **1 Month** if the participant is an *existing participant with an active plan*.

If Contact Attempt is Unsuccessful:

1. Set **Attempted Contact** Outcome equal to **Call 1: Unsuccessful**
2. Set **Type of Contact** equal to **Initial** (Only chose for Initial PCP meeting)

3. Follow the call attempt ticklers outlined in the **Contact Attempts Leading to Closure** section
    a. Record the 1. Date of Contact, 2. Person(s) Contacted Type, 3. Person Contacted Name and any additional information in the Contact Comments / Additional Notes textbox.
    b. Set Assessment/Form Status equal to **Complete**

4. From the **File** menu, select **Save Assessment/Form**

5. From the **File** menu, select **Close Workflow Wizard**

6. From the **File** menu, select **Close Ticklers**

Schedule Appointments

Note: Adding details here is optional

1. Click the **Appointment** tab
2. From the **File** menu, select **Add Appointment**
    a. OpenClose defaults to LTSS
    b. Start Date, Start time, End Date and End time all default to the current date and time but will need updated to the appropriate date and time of the agreed upon assessment appointment.
    c. Set Type equal to **Initial PCP**
    d. Enter a Description, Appointment Summary and/or details as you see fit
    e. Set Location to appropriate location of the appointment
    f. Set Status equal to **Scheduled**
    g. From the **File** menu, select **Save Appointment**

Tip: System Automation will add the current user as an attendee to the appointment when the appointment is saved.

3. If additional attendees need to be added, click the **Add New Attendee** subpage, and select the additional attendee.

4. From the **Word Merge** menu, choose an appointment letter to run.

Note: When a letter is run the preview will display in the middle of the screen, but a downloaded word version of the letter will also automatically be available when you click the word icon in the lower right-hand corner of the window. You will also notice that certain data points that were entered in the appointment details are displayed in the details of the letter.

5. If no changes to the letter are required, then you can save the letter to a note by clicking the **Save to Note button** on the left-hand side.

6. However, if changes to the letter are required, like in this case where the table of attendees needs to be updated, then you would edit the word version, save it in Word and then click the **Upload and Save to Note** button.

7. A Note window will pop up
    a. Set OpenClose equal to **LTSS**
    b. The Note Type will default too **Other. Set to Documentation**
    c. Set Note Subtype equal to **Letter**
    d. The **Description** will default to Word Merge Template. Change it to **Appointment Confirmation [DATE]**
    e. Set Status equal to **Complete**

8. From the **File** menu, select **Save and Close Note**