

WV Online Case Management (CM) Pilot Project

Interim Service Plan Workflow Guide

Revised Feb. 27

E.2 Take Me Home (TMH), WV

When a TMH Participant enrolls in the ADW Program, a BoSS staff member opens the new Participant record and notifies the Supervisor, who assigns the workers. The Case Manager documents an Interim Service Plan, as well as initial and 7-day follow-up contacts. The standard Assessment and Service Plan are due within 21 calendar days.

E.2.a Add New Participant

1. *Add Participant demographics*

Go To: Demographics

Role: BoSS

(File menu - Add New People Search)

1. Search by name, then click Search button
 2. If no match, click Add New button
 3. Complete demographics fields as required
 4. Add Mailing Address if different from Physical
- (File menu - Save and Close)

2. *Open new Participant in Assignments*

Go To: Assignments

Role: BoSS

(When Demographics saved, system goes to page)

1. Update Status = Open
 2. Search and select Worker = 'X, Unassigned'
 3. Select 'Yes" in Take Me Home, WV
- (File menu - Save and Close)

3. *Open new Participant in Program and Agencies*

Go To: Program, Agencies

Role: BoSS

(File menu - Add)

1. Complete required fields
 2. Select Status = 'Open'
 3. Status Date = today
 4. Search and select Worker as 'X - CM Unassigned'
- (File menu - Save and Close)

4. *Add Case Relations if known*

Go To: Case Relations

Role: BoSS

(File menu - Add New Case Relations Search)

1. Click Search button, then Add New button

2. Complete fields as needed

(File menu - Save and Close)

5. *Send Alert Note to Supervisors*

Go To: Notes

Role: BoSS

(File – Add)

1. Enter Note details:

a. Date (default = today)

b. Note By (default = self)

c. Note Type = 'New Participant'

d. Note Sub-Type = 'Assign Worker'

e. Enter Subject and Note Details (optional)

f. Select Status = 'Alert'

g. Note Recipient = Supervisor

(File - Save and Close)

E.2.b Assign Worker

1. *Review Alert Note*

Go To: My Work Lists > Alert Notes

Role: Supervisor

1. Open Note and 'Mark as Read' in Tools menu

2. Append comment

3. Update Status = 'Complete'

(File menu - Save and Close)

2. *Assign Case Manager and Registered Nurse*

Go To: Assignments

Role: Supervisor

1. Select Worker

(File menu - Save and Close)

(CM changes in Program and Agency automatically)

3. *Assign Registered Nurse in Agency*

- Go To: Agencies
(Go to Workers and File menu - Assign Workers)
1. Select Worker
(File menu – Save)
 2. Check box in list view on right
 3. Tools menu - Designate as Primary
(File menu – Close)

Role: Supervisor

E.2.c Interim Service Plan

1. *Add Note with attachment for "Take Me Home WV Transition Plan"*

- Go To: Notes
(File menu – Add)
1. Enter Note details:
 - a. Date (default = today)
 - b. Note By (default = self)
 - c. Note Type = 'Documentation - Participant'
 - d. Note Sub-Type = 'Take Me Home WV Transition Plan'
 - e. Add Attachment
 - f. Note Recipient = Registered Nurse
 - g. Select Status = 'Complete'
- (File - Save and Close)

Role: CM

2. *Print signature page*

- Go To: Demographics (List View)
(Word Merge menu)
1. Select, download, and print

Role: CM

3. *Tickler: Interim Service Plan*

- Go To: My Work Lists > Ticklers
1. Enter header with Type = 'Initial'
 2. Complete body of Clinical Document 'Service Plan – Interim'
 3. Update Status = 'Complete'
- (File menu - Save and Close)
(Close Workflow Wizard)

Role: CM

Workflow Wizard

Interim Service Plan

Please Select Type: **Service Plan - Interim**

Clinical Documents

Type * Initial

Worker * Greenberg, Debby

Assignments * ADW

Date (Assessment / Service Plan Start / Contact) * 02/19/2019

Status * Draft

Date Completed

1. DEMOGRAPHICS AND DATES

Last Name:* Test

First Name:* February

4. *Print and send Interim Service Plan to Participant*

Go To: Clinical Documents
(Word Merge menu)

Role: CM

1. Select, download, and print

5. *Add Note with document and signature page*

Go To: Notes

Role: CM

- a. Note Type = 'Case Note - CM'
- b. Note Sub-Type = 'Interim Service Plan'
- c. Add Attachment
- d. Note Recipient = Registered Nurse

6. *Add Case Relations*

Go To: Case Relations
(File menu - Add New Case Relations Search)

Role: CM

1. Click Search button, then Add New button
2. Complete fields as needed
(File menu - Save and Close)

E.2.d Initial Contacts, Assessments, and Service Plan

1. *Add Note for Initial Contact*

Go To: Notes

Role: CM

- a. Note Type = 'Case Note - CM'
- b. Note Sub-Type = 'Initial Contact'

2. *Add Note for 7-Day Follow-up*

Go To: Notes

Role: CM

- a. Note Type = 'Case Note - CM'
- b. Note Sub-Type = '7-Day Contact'

3. *Tickler: PCA - Section 1 or 2 (TMH) - due within 21 days*

Go To: My Work Lists > Ticklers

Role: CM

1. Enter header with Type = 'Initial'
 2. Complete body of Clinical Document
 3. Update Status = 'Complete'
- (File menu – Save and Close)
(Close Workflow Wizard)