

WV Online Case Management (CM) Pilot Project

Misc. Workflow Guide – New Participants and Case Transfers – Supervisors

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E. New Participants

E.1 Replace Pilot Participant

When a Participant leaves the Pilot or the ADW Program, another Participant fills that slot by activating an existing record. A BoSS staff member opens the new Participant record and notifies the Supervisor, who assigns the workers.

E.1.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 Agency and LOS & Dates automatically)

3. *Assign Registered Nurse in Agency*

Go To: Agencies

Role: Supervisor

- (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)

4. *Add manual tickler for Assessment due date*

Go To: Ticklers

Role: Supervisor

(File menu - Add Detail)

1. Select Tickler = 'PCA - Section 1 or 2 due'
 2. Select Assigned To = Worker
 3. Select Date Due
 4. Select Type
- (File menu - Save and Close)

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.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 Agency and LOS & Dates automatically)

3. *Assign Registered Nurse in Agency*

Go To: Agencies

Role: Supervisor

(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)

F. Case Transfers

Supervisors are responsible to reassign workers within the Agency for a single Participant. If a case load is transferred for multiple Participants, BoSS can reassign automatically using a utility.

If a Participant requests to transfer to another Agency, BoSS initiates the process of communication and enrollment. First, the current Agency supervisor is notified to print the Participant record. The new Agency supervisor assigns the worker, who conducts an Assessment as well as a Service Plan for CMs.

F.1 Reassign Worker within Agency

1. Reassign Worker for single Participant

Go To: Assignments

Role: Supervisor

1. Select Worker

(File menu - Save and Close)

(CM changes in Agency and LOS & Dates automatically)

2. Reassign Registered Nurse in Agency for single Participant

Go To: Agencies

Role: Supervisor

(Go to Workers and File menu – Assign Worker)

1. Select Worker

(File menu – Save)

2. Check box in list view on right

3. Tools menu – Designate as Primary

(File menu – Close)

3. Reassign worker for multiple Participants automatically

Go To: Utilities > Case Load Transfer

Role: BoSS

1. Select Worker type (CM or RN)

2. Select Previous and New Worker

3. Click on Display Case Load button and check boxes

4. Tools menu - Perform Task

F.2 Transfer Agency

1. Current Agency – Review Alert Note and print record

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)

F.2.b Add New Agency

1. *Open new Agency*

Go To: Agencies

Role: BoSS

(File menu – Add)

1. Select Agency
 2. Select Status = 'Open'
 3. Select Status = today
 4. Select Worker = 'X, Unassigned'
- (File menu - Save and Close)

2. *Send Alert Note to supervisor*

Go To: Notes

Role: BoSS

- a. Note Type = 'Case Transfer';
- b. Note Sub-Type = 'Transfer to XXX'

F.2.c 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 Agency and LOS & Dates automatically)

3. *Assign Registered Nurse in Agency*

Go To: Agencies

Role: Supervisor

(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)