

WV Online CM Pilot Project: Assessment Workflow

Initial:

Prep

- * *Select Participant from Tickler*
- * *Update Legal Representative*
- * *Add Case Relations (family, medical, other) including Crisis Backup*
- * *Add Person Centered Assessments – Section 1 (CM) and Section 2 (RN), entering info from previous assessment (paper)*
- * *Mobile: Download to work off-line*
- * *Paper: Print form*
- * *Print signature pages*

Complete

- * *Mobile: Complete fields in Mobile Assessment*
- * *Paper: Complete fields in WellSky application*
- * *PCA – 1 (CM): Add in Case Relations page (name only in Clinical Document)*
- * *Complete Status and link to new Service Plan for PCA - Section 1 (push Risks)*

Additional Info

- * *Demographics: Add Medicare and private insurance info from PCA – Section 1*

6 Month or Annual:

Additional Steps

- * *Tickler: PCA – Section 1 or 2 (6 Month or Annual)*
- * *Duplicate previous assessment*
- * *Update info from other pages entered since last assessment*

Update As Needed

Additional Steps

- * *Duplicate previous assessment*
- * *Cancel previous tickler to reset 6-month timetable*