WV Online Case Management (CM) Pilot Project
Job Aid: CM – RN Checklist for Completeness of Documentation

Revised Apr. 11

Case Manager (CM)

Service Plan

- Risks in 'Active' Status and Interventions entered
- Services entered

Misc.

- Start Date matched between Service Plan and Supplement
- Case Relations entered (including Legal Rep specified and Crisis Backup checkbox)
- Insurance data entered in Demographics
- Mark ticklers as complete

Registered Nurse (RN)

- PAL saved to desktop and sent to PA (use electronic file for updates)
- Note Sub-Type 'PAL Upload' added with attachment in Plan Notes
- Note Sub-Type 'Medication Profile' added with attachment in Plan Notes
- Mark ticklers as complete

Coordination between CM and RN

Service Plan – Active

- RN Assessment completed (send Case Note if overdue as needed)
- PA Service 'Amount and Frequency' entered by RN
- Note Sub-Type 'Signed Assessment/Service Plan' added with attachment in Plan Notes
- Note Sub-Type 'Summary Shared with Participant' added in Notes
- Timeliness tracking data entered

Service Plan – Update

- Document date and change in Plan Info & Dates page
- Note Sub-Type 'PAL/Service Plan Update' with PAL template attached, sent as Alert Note and read/acknowledged in Plan Note