

**WV Online Case Management (CM) Pilot Project
Common Documentation Errors**

Revised Apr. 1

Service Plan – CM

- Start Date in Supplement not matched with Service Plan (required for Summary report)
- Status in Supplement not updated to “Active” (mark as “Complete” after Plan period ended)
- Summary report not shared with Participant and added in Notes
- Signature pages not attached in Plan Notes
- Incomplete sections (Interventions not entered for Risks, Services not entered)

Service Plan – RN

- Assessment by RN not completed before status updated to “Active”
- Medication Profile by RN not attached in Plan Notes

Misc.

- Case Relations not entered or updated (Legal Rep not specified, Crisis Backup not checked)
- Insurance data not entered in Demographics