

WV Online Case Management (CM) Pilot Project
Job Aid: Workflow Wizard Checklists for Service Plans

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CMs and RNs can use the Workflow Wizard (WFW) ticklers to guide the sequence of steps required to complete Service Plans. Each Role has a separate set as shown below, which is triggered as follows:

- CMs: Service Plan – Supplement document saved with Status as “Active”
- RNs: Person-Centered Assessment – Section 2 (RN) saved with Status as “Complete”

Case Managers

Workflow Wizard	
1. Case Relations - Add or update info from Supplement (message) Use Word Merge to facilitate data entry	▶
2. Plan Info - Enter dates and workers	▶
3. Interventions - Enter for each Risk	▶
4. Services - Enter details for ADW	▶
5. Summary Reports - Print and send to Participant Export in PDF format for Assessment and Service Plan	▶
6. Signature Page - Add Note with attachment	▶
7. Timeliness Tracking - Update dates including next due	▶

Registered Nurses

Workflow Wizard	
1. PAL (Word Merge) - Print and send to PA (message)	▶
Case Relations - Add or update info from Assessment Use Word Merge to facilitate data entry	▶
2. Medication Profile - Add Note with attachment	▶
Insurance (Demo) - Add or update info from Assessment	▶
3. Services - Enter Amount and Frequency for PA	▶
4. Summary Report - Print and send to Participant Export in PDF format for Assessment	▶
5. Signature Page - Add Note with attachment	▶
6. Timeliness Tracking - Update dates including next due	▶

Users open ticklers by clicking on the blue hyperlink or selecting the “Open” option in the fly-out menu. Some ticklers go to the relevant page when opened, such as Notes (detail view) or Clinical Documents (list view). Some are message ticklers, so users can proceed as needed. Instructional text displays in black. Users also have the option to “View Participant’s Record”.

When ticklers are completed, users select the “Complete” option in the fly-out menu, and the system displays it with strike-out format. If users select the “Cancel” option, it displays as strike-out in red font.