WV Online Case Management (CM) Pilot Project
Job Aid: Word Merge Documents

Revised Mar. 11

Demographics – List View

People Summaries: *Print as needed*

- Demographics Summary
- Case Relation Summary

Clinical Documents

Signature Pages: *Print as part of prep for visits*

- Signature Page - Assessment
- Signature Page - Service Plan
- Signature Page - RN Contact
- Signature Page - Interim Service Plan

Service Plans:

- Personal Attendant Log (PAL)   *Print as template for PA; Save file to make edits*
- Interim Service Plan   *Print as needed*

Contacts: *Print as needed*

- Contact - Case Management Monthly
- Contact - Registered Nurse

Case Relations: *Save file to copy/paste in Case Relations page*

- Case Relations in PCA - Section 1 (CM)
- Case Relations in Service Plan - Supplement