WV Online CM Pilot Project: Service Plan Workflow

Initial:

Supplement Document

* Select Participant in Quick Search

* Add document, entering info from previous Service Plan

* Prep for Mobile or Paper like Assessments

* Complete after visit in application or Mobile Assessment, with Status = 'Active'

* Enter Crisis Backup in Case Relations

Service Plan Page

* _Plan Info and Dates:_ Complete fields

* _Risks:_ Update Status of Risks pushed from Assessment and add Interventions for each Risk

* _Services:_ CM adds all based on PCA form; RN enters Amount and Frequency for PA service

Complete Service Plan

* Update Status = 'Active'

* CM prints and sends reports to Participant

* RN prints and sends PAL template to PA

* Add Plan Note: Attach copy of signature pages

* Add Note: Date shared with Participant

Notes (as needed)

Plan Notes:
* Plan-specific documentation
* Dual Services for PC POC

Notes:
* Behavior issues
* Delay in completing PCA

6 Month or Annual:

Additional Steps

* Duplicate previous Supplement document

* Update previous Service Plan Status = 'Complete'

Update As Needed

Additional Steps

* Document date and change
* Add and update Risks and Interventions
* Alert Note to review change

* CM: Update Supplement document as needed
* RN: Print updated PAL template as needed