



UPCAP Services, Inc.
 SW/RN Case Manager
 New Employee Orientation Agenda
 (Waiver and Care Management Programs)

Employee:	Start Date:		
Position:	Supervisor:		
Office:	Team Leader:		
ORIENTATION			
	Date	Trainer	Trainee
Employee Handbook			
Insurance & Benefits			
Staff Forms			
Job Description			
Equipment (Computer, scanner)			
Business Cards			
Cell Phone			
Photo ID/Badge			
Organizational Chart			
Background Check			
OIG/SAM			
Work Schedule/Hours			
Email (outlook or g-mail)			
COVID			
Compass/Compass GO/Dashboard			
Office			
	Date	Trainer	Trainee
Copy machine			
Internet fax			
Office key			
Supplies			
Initial Training			
	Date	Trainer	Trainee
Confidentiality/HIPAA			
Fraud, Waste & Abuse			
Bloodborne Pathogens			
Intake and Referral Process			
Participant Handbook			
NFLOCD/FOC			
Attachment K			
Attachment M – Person Centered Planning			
Attachment H + Provider List			
Online trainings (see attached list) Specific to MI Choice			
FORMS/PROCEDURE TRAINING			



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	Date	Trainer	Trainee
Initial Assessment Resource Folder			
30-Day Contact			
14-Day Follow Up			
Client Status			
DHHS Waiver Enrollment /Disenrollment			
Adverse Benefit Determination and Appeals			
Medical Needs, Supplement Order, Oxygen Order			
Person-Centered Service Summary			
Consent Forms			
ADT/CCD Notices			
SPECIFIC TRAINING			
Mi Choice is Highlighted	Date	Trainer	Trainee
Introduction to MHL (online)			
UPHP Overview			
Altruista/Documentation			
UPHIE			
UPHP Process Guidelines			
Assessments (online)			
Personal Care members versus C-Waiver members			
Person Center Planning (online)			
Self Determination (online)			
Care Coordination (online)			
Disability (online)			
Critical Incident (online)			
Advance Directives (online)			
Disability Awareness (online)			
Cultural Competency (online)			
Behavioral Health (online)			
Field Orientation			
	Date	Trainer	Trainee
Observation Visit #1 Initial Assessment Reassessment			
Observation Visit #2 Initial Assessment Reassessment			
Observation Visit #3 Initial Assessment Reassessment			
Observation Visit #4 Initial Assessment Reassessment			
Observation Visit #5 Initial Assessment Reassessment			
Lead Visit #1 Initial Assessment Reassessment			
Lead Visit #2 Initial Assessment Reassessment			
Lead Visit #3 Initial Assessment Reassessment			



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Lead Visit #4	Initial Assessment	Reassessment			
Lead Visit #5	Initial Assessment	Reassessment			