



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

Employee Position: Office:	Start Date: Supervisor: Team Leader:		
ORIENTATION			
	Date	Trainer	Notes
Employee Handbook			
Insurance & Benefits			
Staff Forms			
Job Description			
Equipment (Computer, scanner)			
Business Cards			
Cell Phone			
Photo ID/Badge			
Organizational Chart			
Background Check			
Reference Check			
OIG/SAM			
Work Schedule/Hours			
Email (outlook or g-mail)			
COMPASS/COMPASS GO/Dashboard			
Office			
	Date	Trainer	Notes
Copy machine			
Internet fax			
Office key			
Supplies			
Mail			
Initial Training			
	Date	Trainer	Notes
Confidentiality/HIPAA			
Fraud, Waste & Abuse			
Universal Precautions			
Intake and Referral Process			
Participant Handbook			
NFLOCD/FOC			
Medicaid Provider Manual – MI Choice Section			



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MI Choice Policy and Procedure Manual			
FORMS			
	Date	Trainer	Notes
Initial Assessment Resource Folder			
Monitoring Contacts			
2-Week Follow-Up Calls			
Client Status			
DHHS Waiver Enrollment /Disenrollment			
Adverse Benefit Determination and Appeals			
Medical Needs, Supplement Order, Oxygen Order			
Person-Centered Service Plan			
Consent Forms			
ADT/CCD Notices			
**All forms noted above can be found on staff portion of UPCAP's website.			
SPECIFIC TRAINING (Within 30 days of hire)			
	Date	Trainer	Notes
Introduction to MHL (online)			https://courses.mihealth.org/MIHealthLink/
Assessments (online)			https://courses.mihealth.org/MIHealthLink/
Person Centered Planning (online)			https://courses.mihealth.org/MIHealthLink/
Self Determination (online)			https://courses.mihealth.org/MIHealthLink/
Care Coordination (online)			https://courses.mihealth.org/MIHealthLink/
Disability (online)			https://courses.mihealth.org/MIHealthLink/
Critical Incident (online)			https://courses.mihealth.org/MIHealthLink/
Advance Directives (online)			https://courses.mihealth.org/MIHealthLink/
Cultural Competency (online)			https://courses.mihealth.org/MIHealthLink/
Behavioral Health (online)			https://courses.mihealth.org/MIHealthLink/
Medicare Basics (online)			http://www.nasuadiq.org/login/index.php
Medicaid 101 (online)			http://www.nasuadiq.org/login/index.php
Preventing Abuse and Exploitation (APS, Intro to Elder Abuse)			http://www.nasuadiq.org/login/index.php
Guardianship			http://www.nasuadiq.org/login/index.php
Alzheimer's Disease			http://www.nasuadiq.org/login/index.php
Motivational Interviewing (online)			https://www.train.org/cdctrain/course/1097362/details CDC Train – must set up account
Utilizing SMART Goals			https://youtu.be/rz-OhYcpOIQ?si=Zl7GpCCy44i8vy-f



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Health Literacy (online)			https://www.train.org/cdctrain/course/1105934/details CDC Train – must set up account
Health Equity/Social Determinants of Health			https://courses.mihealth.org Course ID: H0300-2016 – must set up account
Field Orientation			
	Date	Trainer	Trainee
Observation Visit #1 Initial Assess			
Observation Visit #2 Initial Assess			
Observation Visit #3 Initial Assess			
Observation Visit #4 Initial Assess			
Observation Visit #5 Reassessment			
Observation Visit #6 Reassessment			
Lead Visit #1 Initial Assessment			
Lead Visit #2 Initial Assessment			
Lead Visit #3 Initial Assessment			
Lead Visit #4 Reassessment or PCSP			
Lead Visit #5 Reassessment or PCSP			
UPHP TRAINING			
UPHP Overview			
Altruista/Documentation			
UPHP Process Guidelines			