

New Participant Checklist (Care Management)

After Initial Assessment: Care Management

- Complete Assessment in COMPASS
 - Must be completed within 2 business days
 - Update Progress Notes w/ Summary
 - See charting example
- Complete Person-Centered Service Plan in COMPASS
 - Must be completed within 5 business days – cannot start services before finalized
 - Ensure all goals are linked to appropriate interventions
 - Make sure informal caregivers/supports are listed under Informal interventions
- Review with other SC discipline and finalize Assessment
- Complete Participant Case File
 - Ensure Address, Phone Number, DOB, and Social Security Number are correct
 - Complete Medicare Information and Effective dates
 - Enter due dates
- Submit completed COMPASS Status Report to Case Tech
 - Care Management designation (ACLS-CM)
- Submit completed Well-Sky form to Mary Ross-Dubord
- Mail or fax Dr. Letter and Medical Release
- Mail Referral Source Notification/Letter – place copy in file
- Complete Cost Share Worksheet
 - Notify participant of cost share amount
 - Submit to Director of LTC Programs for billing
- Request optional funding (202) funding if appropriate
 - Submit 202 Funding Request form and Care Plan Cost Review to Director of LTC Programs
- Contact agencies for available grant services or resources – make referrals
- Assist with creating budget and arranging for privately paid services if appropriate