

New Participant Checklist (MI Choice)

After Initial Assessment: Waiver only

- Complete Assessment in COMPASS
 - Must be completed within 2 business days of in-person visit
 - Update Progress Notes w/ Summary
 - See charting examples
- Complete Person-Centered Service Plan in COMPASS
 - Must be completed within 5 business days of in-person visit
 - Services can NOT start before PCSP is 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 (within 7 days for assessment)
 - Assessment must be finalized before services can begin
- Complete Participant Case File in COMPASS
 - Ensure Address, County, Phone Number, DOB, and Social Security Number are correct
 - Complete Medicare Plan Information and Effective dates
 - Enter due dates
- Submit completed NFLOCD and FOC to Case Tech
 - NFLOCD must be entered within 14 days of completion
 - If not submitted within 14 days of the completion of NFLOCD, a new NFLOCD, FOC, and COMPASS Assessment must be completed before participant can be opened to the Mi-Choice Waiver
- Submit completed COMPASS Status Report to Case Tech:
 - Waiver-Pending designation if participant is already on Medicaid
 - Care Management (ACLS-CM) designation if waiting for Medicaid application to be submitted to MDHHS
- Email Waiver Enrollment form to Enrollment Specialist
 - Do not submit until Mi-Choice Waiver date is confirmed
 - Complete Enrollment form in its entirety
 - Date of Waiver Enrollment must be the same as Waiver-Pending date
 - Submit copy of emailed Waiver Enrollment to Case Tech with NFLOCD

- Mail Referral Source Notification/Letter – place copy in file
- Mail or fax Dr. Letter and Medical Release with copy of COMPASS Medication and Allergy Report
- Contact Agencies for Service Availability
 - Document attempts to arrange services in progress notes
- Submit Supervisory Care Plan Review/Budget to Regional SC Supervisor or Director
 - SC can NOT start services until form is signed and returned
 - Place signed copy in file
- Once Care Plan Budget received:
 - Submit Work Orders for data entry
- Send Back-up Plan to participant and those designated on the care plan
 - Place copy in file
- Send finalized copy of the Person-Centered Service Plan to participant and those designated on the care plan
- Participant must be contacted within 14 days of the start of services:
 - Complete Two-week Service follow up in COMPASS progress notes
 - Review service start dates and satisfaction

If Self Determination

- Forward Participant Information Sheet - if AWC
- Forward Self Determination Enrollment to FI or AWC
- Complete work order for World Point training materials and submit for data entry
- Once kick-off is completed and Employment Agreement (EA) is received, submit work order to Case Tech. Place EA in chart
- Request copy of employee training sign off sheet for file