



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

<b>Employee:</b>	<b>Start Date:</b>		
<b>Position:</b>	<b>Supervisor:</b>		
<b>Office:</b>	<b>Team Leader:</b>		
<b>ORIENTATION</b>			
	<b>Date</b>	<b>Trainer</b>	<b>Notes</b>
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			
<b>Office</b>			
	<b>Date</b>	<b>Trainer</b>	<b>Notes</b>
Copy machine			
Internet fax			
Office key			
Supplies			
Mail			
<b>Initial Training</b>			
	<b>Date</b>	<b>Trainer</b>	<b>Notes</b>
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			
<b>FORMS</b>			
	<b>Date</b>	<b>Trainer</b>	<b>Notes</b>
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.			
<b>SPECIFIC TRAINING (Within 30 days of hire)</b>			
	<b>Date</b>	<b>Trainer</b>	<b>Notes</b>
Introduction to MHL (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Assessments (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Person Centered Planning (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Self Determination (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Care Coordination (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Disability (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Critical Incident (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Advance Directives (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Cultural Competency (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Behavioral Health (online)			<a href="https://courses.mihealth.org/MIHealthLink/">https://courses.mihealth.org/MIHealthLink/</a>
Medicare Basics (online)			<a href="http://www.nasuadiq.org/login/index.php">http://www.nasuadiq.org/login/index.php</a>
Medicaid 101 (online)			<a href="http://www.nasuadiq.org/login/index.php">http://www.nasuadiq.org/login/index.php</a>
Preventing Abuse and Exploitation (APS, Intro to Elder Abuse)			<a href="http://www.nasuadiq.org/login/index.php">http://www.nasuadiq.org/login/index.php</a>
Guardianship			<a href="http://www.nasuadiq.org/login/index.php">http://www.nasuadiq.org/login/index.php</a>
Alzheimer's Disease			<a href="http://www.nasuadiq.org/login/index.php">http://www.nasuadiq.org/login/index.php</a>
Motivational Interviewing (online)			<a href="https://www.train.org/cdctrain/course/1097362/details">https://www.train.org/cdctrain/course/1097362/details</a> CDC Train – must set up account



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Utilizing SMART Goals			<a href="https://youtu.be/6UAabOYDY_c?si=DDVgFcGzri-S0HzD">https://youtu.be/6UAabOYDY_c?si=DDVgFcGzri-S0HzD</a> <a href="https://youtu.be/rz-OhYcpOIQ?si=Zl7GpCCy44i8vy-f">https://youtu.be/rz-OhYcpOIQ?si=Zl7GpCCy44i8vy-f</a>
Health Literacy (online)			<a href="https://www.train.org/cdctrain/course/1112813/details">https://www.train.org/cdctrain/course/1112813/details</a> CDC Train – must set up free account
Introduction to Unconscious Bias Training (online)			<a href="https://ready.csod.com/ui/lms-learning-details/app/curriculum/9bab9bd1-7f2d-4fc1-858f-eeee5c3f6b63">https://ready.csod.com/ui/lms-learning-details/app/curriculum/9bab9bd1-7f2d-4fc1-858f-eeee5c3f6b63</a> Nonprofitready.org – must set up free account
Health Equity/Social Determinants of Health			<a href="https://edhub.ama-assn.org/health-systems-science/interactive/17498806?appid=schub">https://edhub.ama-assn.org/health-systems-science/interactive/17498806?appid=schub</a> AMA Ed Hub – must set up free account
<b>SPECIFIC TRAINING (Within 60 days of hire)</b>			
Home Safety Specialist			<a href="https://shss.talentlms.com/index">https://shss.talentlms.com/index</a> Coupon Code: UPCAP – must set up account
<b>Field Orientation</b>			
	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			
<b>UPHP TRAINING</b>			
UPHP Overview			
Altruista/Documentation			
UPHP Process Guidelines			