| **Module / Policy** | **CareManager Tabs** | **Related Forms** | **Tools / Resources** | **Hands on Activities** | **Recorded Trainings** |
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| **Module 1:**  B2. Medicaid and HH Eligibility  B3. HH Engagement & Enrollment  B4. HH Consent | * Eligibility * Problems * Assessments (Intake) * Consents * Client Search Notes * Attachments | * CHC Referral Form * Intake Assessment * DOH 5234 * Welcome Letter / Bill of Rights * DOH 5236 * Member Ack. Form * DOH 5055 * Hixny Withdrawal of Consent | * Enrollment Workflow * Opt Out Checklist * Problems Tip Sheet * Sample Consent (Highlighted) * Consent Guide * DOH Required Forms Matrix | Engagement:   * Referral Contacts * Opt Out   New Enrollment:   * Intake * Consents / Paperwork * Obtaining Med Records * Enroll in CareManager | * Module 1, Video 1 – Eligibility, Engagement and Enrollment * Module 1, Video 2 – Health Home Consent * Client Search – Enrolling and Opting out Candidates * Entering Consents in CareManager * Entering Problems in CareManager * Entering Eligibility in CareManager * Demographics in CareManager |
| **Module 2:**  C2. Assessments and Re-assessments  C3. Plan of Care | * Assessments * Additional Forms (SDOH, CES, IA) * CareManager Plan | * Comp Assessment * Assessment / Screening Tool Matrix * Member Ack Form * 60 Days Billable Note | * Screening Tool Guidance * Advance Directives Member Handout * Sample Care Coordination Activities * Sample Actionboard | * Member Assessment or Re-assessment / Screening Tools * Plan of Care Development / Update | * Module 2 Video – Assessments, Screening Tools and Plans of Care * Assessments and Screening Tools in CareManager * Entering Plans in CareManager |
| **Module 3:**  C1. HH Services  C4. Care Note Documentation  E2. HML Assessments | * CareManager Notes * Assessments (HML) | * Core Services Handout * Billable Services * HML Questionnaire | * HML Supporting Documentation | * Visits / Contacts with Members * Documentation of contacts * HML completion | * Module 3, Video 1 – Core Services * Module 3, Video 2 – HML Assessments * CareManager Notes and Plan Updates * Quality Notes and Documentation * HML Refresher Training * Entering HMLs in CareManager |
| **Module 4:**  J1. CareManager | * Demographics * Programs * Social Supports * Documents | * CareManager Ticket Request Form * CareManager Attachment Naming | * CareManager Manual | * Documentation in CareManager * Playing in UAT | * Module 4 - CareManager * CareManager Basics and Troubleshooting * Entering Programs in CareManager * Entering Social Supports in CareManager * Hallmark Events, Episode Detail and Attachments |

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| **Policy** | **CareManager Tabs** | **Related Forms** | **Tools / Resources** | **Hands on Activities** | **Recorded Trainings** |
| **Module 5:**  D1. Critical Events and Care Transitions  D2. Incidents and Complaints  I1. MCO Communication  I3. Hixny Communication | * Hallmark Events * Facesheet (alerts) * Consents * View Hixny Provider Portal | * Incident Reporting Form * CMA Incident Investigation Form * MCO Point of Contact * Fidelis Health Home Inquiry Form | * Focus on Care Transitions * Care Transitions Guide for Members / Providers * Care Transitions Sample Vignettes * Education on use of the ER * Hixny Workflow * Health Home Consent Guide * Hixny Whitelist Resource Guide | * Care Transitions, as occur * Incidents, as occur * Seeking documentation in Hixny, HeC or EpicCare Link | * Module 5, Video 1 – Reportable Incidents and Care Transitions * Care Transitions Training and Vignettes * Module 5, Video 2 – MCO and Hixny Communications * Entering Consents in CareManager * Entering Eligibility in CareManager |
| **Module 6:**  C5. Case Transfers  C6. Case Closure and Re-engagement  C7. Fair Hearing | * Discharge * Contact Note (DSE / ES status) * Care Coordination | * Case Transfer Request Form * DOH 5235 * Required Disenrollment Letter | * Case Transfer Quick Guide * Case Transfer Protocol * DOH Required Forms Matrix * Graduation Readiness Questionnaire * DSE Quick Guide * Case Closure Workflow * Closure Requirement Quick Guide * Sample Discharge Summaries | * Case Transfer Warm Handoff * DSE Plan update * DSE Activities and Documentation * Member Discharge * Discharge Summary writing | * Module 6, Video 1 – Case Transfer and Fair Hearings * Module 6, Video 2 – DSE, Excluded Setting and Case Closure * DSE Refresher Training * Discharge Planning Training |