| **Module / Policy** | **CareManager Tabs** | **Related Forms** | **Tools / Resources** | **Hands on Activities** | **Recorded Trainings** |
| --- | --- | --- | --- | --- | --- |
| **Module 1:**B2. Medicaid and HH EligibilityB3. HH Engagement & EnrollmentB4. 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-assessmentsC3. 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 ServicesC4. Care Note DocumentationE2. 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 TransitionsD2. Incidents and ComplaintsI1. MCO CommunicationI3. 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 TransfersC6. Case Closure and Re-engagementC7. 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
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