The following workflow follows CRHC Policy and Procedure C6. Care Coordination Case Closure and Re-Engagement.

This document seeks to outline the required paperwork and documentation at time of case closure.

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| **Discharge Readiness** |
| ☐ Discuss discharge with the Member to ensure readiness and prepare the Member. This preparation may take more than on meeting or contact – discharge is a process, not an event. |
| ☐ Review the Plan of Care with the Member and update Objectives or Interventions as appropriate. Close out any that were achieved. Be sure to at least leave on the Care Coordination activities so you can continue to document billable notes as needed. |
| ☐ If there are unmet needs, be sure the Member has the appropriate resources or supports in place to address them post-discharge. |
| ☐ Contact any relevant and engaged providers on the Care Team to let them know about the upcoming discharge including the anticipated timeframe. Be sure to solicit for their thoughts on the Members readiness for discharge. |
| ☐ Communicate the discharge to the MCO if applicable. Don't forget that Members with Fidelis may be able to benefit from their telephonic case management services. |

| **Documentation Requirements** |
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| If the Member's case is closed due to ineligibility, inappropriateness or loss of contact, provide the DOH 5235 *Notification of Disenrollment in the NY Health Home Program* to Member at least ten (10) days in advance of closing case and upload a copy into CareManager. |
| ☐ Regardless of closure reason the Required Disenrollment Letter must be sent to the Member letting him or her know that the case is being closed. Please be sure to update all information to tailor the letter to your Member and their reason for closure and put the letter on your agency's letterhead. |
| ☐ End the Consent in CareManager by opened the Electronic HIE consent, clicking Edit and changing the value in the Client Opt-in/Out drop down to "Client Opt-out" and save. |
| Complete a Discharge Summary in CareManager documenting the rational for the case closure. The summary will essentially be a summary of everything you did in terms of Discharge Readiness.  *(Note: If required forms cannot be completed with or sent to the Member due to lack of current contact information such as address, this must be noted in the Discharge Summary.)* |
| ☐ Complete the final HML in CareManager. |
| ☐ Review any paper records in the Member's file and ensure ALL documents in the file are uploaded. |
| ☐ Bring paper chart and written discharge summary to Supervisor for closure. |