



## CMCT TELEPHONIC CASELOAD MANAGEMENT JOB AID:

<b>HIGH, MEDIUM &amp; LOW PRIORITY TASK LIST</b>				
High Priority			Medium Priority	Low Priority
<i>Clients that need more frequent contacts to engage in the CMCT program, and/or to fulfill an immediate need, goal or request from the case manager</i>			<b>General Caseload Management</b>	<b>General Caseload Management</b>
Category: #1 Within 72 Hours (1-3 days) High Risk Events & Returning Incoming Calls	Category: #2 Within 1-7 days (A week) Outreach & Engagement, Supporting Clients Request & Care Coordination	Category: #3 Within 1 – 7 weeks “Consult & Transfer” Requests, Transfer Clients, Client Medi-Cal Status follow-up	Average every 2 months or 60 days routinely <i>Maintenance Phase: Actively Engaged Clients</i>	Once every 2 months or 60 days <i>Maintenance Phase: Active Unengaged Clients</i>
<p><b><u>Task(s): High Risk Notifications</u></b></p> <ul style="list-style-type: none"> <li>○ Every morning CHWs should review their High Risk Event Notifications in CCLink</li> <li>○ Prioritize the first outreach attempt within 72 hours of receiving the notification(s).               <ul style="list-style-type: none"> <li>● Follow the HRE Workflow thoroughly</li> </ul> </li> </ul>	<p><b><u>Task(s): “NEW CLIENT” Outreach &amp; Engagement</u></b></p> <ul style="list-style-type: none"> <li>○ The goal is to start the “Outreach &amp; Engagement” workflow within 7 days of a new client entering your MyPatients Report (Workque)               <ul style="list-style-type: none"> <li>● <i>Follow through with the O&amp;E workflow protocol until the client engages or disenrollment is necessary</i></li> </ul> </li> </ul> <p><b><u>Task(s): Supporting clients to complete an immediate goal, need or request</u></b></p> <ul style="list-style-type: none"> <li>○ <i>Example: transportation to an upcoming appt., other immediate assistance or advocacy to connect with services etc.</i></li> </ul> <p><b><u>Task(s): Follow-up on Referrals &amp; Care Coordination with Other Providers</u></b></p> <ul style="list-style-type: none"> <li>○ Review your CCLink in-baskets, referral messages,</li> </ul>	<p><b><u>Task(s): Consults &amp; Transfer Requests</u></b></p> <ul style="list-style-type: none"> <li>○ If you assess that a client should have a consult or a transfer is needed to a specialist, submit the request within the first week you identify the need               <ul style="list-style-type: none"> <li>● Allow 3 weeks for the for the consult to be completed</li> <li>● Follow-up on the consult and/or the client for next steps no later than 2 weeks after the consult was completed</li> </ul> </li> </ul> <p><b><u>Task(s): Clients that have been transferred to CHWs from another case manager</u></b></p> <ul style="list-style-type: none"> <li>○ Work towards integrating transferred clients into your outreach schedule &amp; appt. books</li> </ul>	<p><b><u>Task(s): Goal Maintenance Follow-ups</u></b></p> <ul style="list-style-type: none"> <li>○ Clients that are in the “<b>maintenance phase</b>” of the Core Services</li> <li>○ Clients that you are supporting through their goals, but there is no immediate assistance needed from the case manager that has been listed in the areas of HIGH PRIORITY!</li> </ul> <p><b><u>Task(s): Client’s Discharges Workflow</u></b></p>	<p><b><u>Task(s): Clients w/ all goals completed:</u></b></p> <ul style="list-style-type: none"> <li>○ Start setting next outreach dates further out for general check-ins about the clients’ well-being               <ul style="list-style-type: none"> <li>● <i>If new goal develop in the future... Prioritize accordingly to High Priority</i></li> </ul> </li> </ul> <p><b><u>Task(s): Patients you have sent the “NO CONTACT – LACK OF ENGAGEMENT FOLLOW-UP Letter</u></b></p> <ul style="list-style-type: none"> <li>○ This lack of Engagement</li> </ul>



## CMCT TELEPHONIC CASELOAD MANAGEMENT JOB AID:

<ul style="list-style-type: none"> <li>○ If the client needs support outside of your scope of work, submit the appropriate consult or transfer request to the other specialists</li> </ul> <p><b><u>Task(s): Returning Incoming calls</u></b></p> <ul style="list-style-type: none"> <li>○ When receiving incoming messages from clients (i.e voice messages or in-basket messages from the intake unit) attempt to return phone calls within 72 hours</li> </ul>	<p>and respond to the request within 7 days.</p> <ul style="list-style-type: none"> <li>● <b><i>Request from Providers Beyond the Core Services</i></b> <ul style="list-style-type: none"> <li>▪ <i>If you receive a request beyond the limits identified within the scope of a CHW, discuss this request with your supervisor ASAP before taking action on providers request</i></li> <li>▪ <i>Try to establish a working relationship with providers to help them to understand your role as a Telephonic Case Manager in CMCT</i></li> </ul> </li> <li>● <b><i>Care Coordination with External &amp; Internal Providers</i></b> <ul style="list-style-type: none"> <li>▪ Contact other providers within a week of the provider reaching out.               <ul style="list-style-type: none"> <li>❖ Introduce yourself, 2) the scope of providing telephonic case management, 3) discuss with providers ways not to duplicate services, 4) and exchange contact information if needed</li> <li>❖ You should also discuss with the provider your next outreach plan with the client. Assess together should you contact the client sooner, or could you wait until their appt. to follow-up with the provider’s request.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Change the “Next Outreach Date” for these clients for future outreach &amp; put entry in appt. book</li> <li>● Review if transfers are actually new clients(with no Outreach attempts), and prioritize these clients for Outreach &amp; Engagement workflow</li> </ul> <p><b><u>Task(s): Follow-up on Client Medi-Cal Status (In-baskets):</u></b></p> <ul style="list-style-type: none"> <li>○ Review in-basket messages from SSPAs and schedule follow-ups with client according to the request           <ul style="list-style-type: none"> <li>● Example: if request to disenroll, do so ASAP</li> <li>● If you are asked to reach the client to assist with Medi-Cal re-certification, pay attention to when it will lapse and prioritize outreach accordingly to assist client with keeping their insurance</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ Start the Discharge Workflow 2 months prior to their discharge date</li> </ul> <p>follow-up letter is for clients who are considered ACTIVE but are “Unengaged”</p> <ul style="list-style-type: none"> <li>● i.e. They may have complete QofL, or HRE or have goals but after several attempts, no contact</li> </ul> <ul style="list-style-type: none"> <li>○ These client you can set next outreach dates every 60 days after sending the letter</li> <li>○ If they call you back to re-engage, then they are to be place in the <b><i>High Priority Category #2 Phase</i></b></li> </ul>
---	---	---	--



## CMCT TELEPHONIC CASELOAD MANAGEMENT JOB AID:

### PRODUCTION GOALS & EXPECTATIONS:

## Q&A

### How many patients should I be contacting within a week?

- Telephonic Case Managers are expected to reach 40 or more successful “Client Contacts” per a week
  - That breaks down to at least 8 successful client contacts per day
    - *Successful Contacts means – Actually speaking with clients to discuss Engagement, the Social Needs Screening, Goals and/or Resources at each “client/patient encounter”*

### Why approximately 8 clients per day?

- *Each telephonic case manager will have 350 clients to manage annually*
- *The program’s goal is to reach out to every client, every 60 days on average throughout the year.*
- ***350/44= 7.95 (There are actually 44 workdays in a 2 month period)***
- *To meet the goals of the program, the average would be 8 successful client contacts per day*

### What if I am unable to contact 40 clients within a week?

- If you are unable to contact 40 clients within a week (or 8 per day), you should be able to show double & (1/2) half outreach attempts per day.
  - *Client attempts mean – Calls you have made to reach the patient but was unsuccessful*



## CMCT TELEPHONIC CASELOAD MANAGEMENT JOB AID:



- *Examples – left message, was told by the client “to call back at another time”, phone is out of service etc.*
- *You should 20 or more outreach attempts per day, in case where 8 patient contacts were not attained*
  - In effort to reach the goal of 40 successful contacts per week, ***outreach attempts should be at least a 100 calls per week***