

Care Management Checklist

Case Management Process

This checklist can be reviewed periodically and when there is any new staff to the care management program.

○ Patient Identification

- MDC – MiPCT Patient List
- Internal lists from Registries, Predictive Modeling Tool, Risk Stratification
- Consider use of new patient enrolled letter
- Care Manager Brochure or leaflet
- Use of Patient Portals or Secure Email
- How to determine insurance coverage

○ Assessment – Problem and Opportunity Identification

- Comprehensive Assessment Tool (Electronic in EMR or Word), Paper
- Payer Documentation Requirements
- Screening Tools (PHQ2 or 9, GAD7, REALM, Substance Abuse, Readiness Ruler)

○ Care Planning/Implementation/Care Coordination

- Evidence-based Guidelines such as MQIC
- Plan of Care Form/Tool
- Self-management Goals Tool
- Educational Resources
- Referral Consent Forms/Resources
- Community Resources (Neighborhood)
- Tickler/Tracking system to manage follow-up care and patient/CM communications

○ Case Closure

- Release of Information – for care transition to another provider/facility
- Letter template for unable to reach process
- Case closure letter
- Self-management form
- Relapse Prevention – Self Management Action Plan
- Process to manage patients in various stages in your caseload
- Process to review case closure with the PCP
- PCP Communication Template – such as SBAR