Money Follows the Person/Pathways to Community Living

Monthly Webinar June 2016
CRM and MFP – ANE Checks, Re-Referrals, Timely Entry
Purpose of Presentation
CRM
When you sign into CRM, you land on your default dashboard. Select TC (New) and set it as your default dashboard dashboard.

Click Microsoft Dynamics CRM to return to your default dashboard from any page.
Click on a Case Number to Get to the Participant Case Page

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Must Contact</th>
<th>First Name</th>
<th>Last Name</th>
<th>RIN (Participant)</th>
<th>Date Of Birth</th>
<th>Stage Name</th>
<th>Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>MFP-005397 (Fopumf Amcricht - 9...</td>
<td>Fopumf</td>
<td>Amcricht</td>
<td>964190019</td>
<td>9/9/1965</td>
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<tr>
<td>MFP-019180 (MUWoT MOWU - 67...</td>
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<td>MUWoT</td>
<td>67449261</td>
<td>10/14/1970</td>
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<tr>
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<td>MoPFU</td>
<td>98485319</td>
<td>10/9/1947</td>
<td>CONTACT</td>
<td>HERITAGE HEA</td>
<td></td>
</tr>
<tr>
<td>MFP-019284 (FUWP CUUKT - 1818...</td>
<td>12/10/2014</td>
<td>FUWP</td>
<td>181802767</td>
<td>11/15/1960</td>
<td>INFORMED CO...</td>
<td>FAIRVIEW NUR</td>
<td></td>
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<tr>
<td>MFP-019332 (Razz Berry - 000222...</td>
<td>9/10/2015</td>
<td>Razz</td>
<td>000222665</td>
<td>1/8/1942</td>
<td>PRE-TRANSITION</td>
<td>ADDOLORATA.</td>
<td></td>
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</tbody>
</table>
Participant Case Page

- Case Number
- Progress Bar, Stage Checklist, Stage Flag & Next/Previous Stage Buttons
- Referral Summary
- Participant Summary: Contact HFS with edits to this data.
- Footer (Enrollment Status)
Participant, Info, MCO Enrollment & Facility Summary

Name, RIN, SSN, DOB and MCO Enrollment, Facility Summary

Info can be updated, email request with Case Number and details to: HFS.MFP@Illinois.gov
Contact Stage
Contact Stage Summary

- Enrollment Status in Contact Stage=Undefined
- The “Most Recent Contact date” and “Individual is Considering MFP” fields are automatically updated when new case contacts are submitted.
- Re-referrals: the Case owner will receive an activity notice for re-referrals. Enter a case contact.
  - Important to notify UIC/HFS of staff turnover and keep “Owner” field current.
- Case notes, LOC assessment, Send Case Back, & Attachments may be used in the Contact stage
New Cases – Unassigned and Not Contacted

- New Participant cases that need follow-up will populate in the views called: Unassigned and Not Contacted
  - Cases will stay in the Unassigned view until they are assigned to a TC (Owner)
  - Cases will stay in the Not Contacted view until a case contact is entered.
Assign the Case

Cases need to be assigned to a staff person, not an agency, in the Transition Coordinator (Owner) field so it can move out of the Unassigned view.
Complete a case contact within 10 days of receiving a new participant case from HFS.

Complete for all individuals who have been screened and/or received a brief face-to-face assessment.

- Participants must be contacted face-to-face in order to engage in MFP
Document the Case Contact

Step 1: Scroll down the participant’s case page to the blue heading CONTACT (A).

Step 2: Click “+” to add a new Case Contact.
Case Contact Required Data: Date of Contact

Date of the Case Contact: The date you met with the participant (or date of attempted contact/change in status).

Participants who engage in MFP are required to have face-to-face contact.
Contact Outcome: Considering MFP (Recommended to Transition)

- If the participant chooses to proceed with MFP, select this outcome:
  - Individual is considering MFP transition and is a possible MFP transitional candidate

- The participant is now engaged in MFP and is expected to move forward to enrollment/Informed Consent.
Contact Outcome: Not Considering MFP

- If the participant chooses not to proceed or is unable to proceed or be contacted, choose one of the other outcome options:
  - Other (Provide Other reason)
  - Family/caregivers refused participation
  - Guardian refused participation
  - Preference is to continue living in the nursing home
  - Service needs due to physical health are greater than what could be provided in the community
  - Service needs due to mental health are greater than what could be provided in the community
  - Would not be able to locate appropriate housing
  - Individual is not interested in participating (refused)
  - Individual is not eligible
  - Individual is deceased
  - Would be better served by a different state agency

- Participant is not engaged in MFP and no further documentation would be expected unless a re-referral is received. Enrollment status = Undefined
Case Contact Required Data:
Contact Outcome and Comments

- **Outcome of the Contact**: choose the best option
- **Comments**: a brief description of the contact outcome, particularly for those not proceeding to enroll in MFP.

![Outcome form](image.png)

**Outcome**

**Tell us about the outcome of the referral**

**Outcome**: Individual is considering MFP transition and is a possible MFP transitional candidate

**Revisit On**: --

**Comments**:

Participant will receive a comprehensive assessment prior to enrollment.
Save and Close

Click Save & Close when you have entered all the data for the case contact. If any required data are missing you will receive an error and the form will not close.
Completed Case Contacts

The First Contact Date and Considering MFP was updated when the case contact was entered.

Completed Case contacts are listed here. Click the “Name” link to view the case contact. Use your browser’s back button to return to the case page from a case contact.
Enter a Case Contact for Participants No Longer in the Facility

- If you find out from the nursing home staff that the participant you are trying to contact has
  - become deceased or
  - has moved out of the facility...

**Complete a case contact to document this.**
This closes the loop on the referral.
If a potential participant is “Considering MFP” at initial contact but **prior** to signing the informed consent the participant/guardian...

- *changes their mind* or
- *The participant’s situation changes* ...

The TC should **complete another case contact to document** the date and new outcome.
Re-referral in Contact Stage?

- Enter a new Case contact (A)
- Mark Re-referral Activity complete
- Case notes are encouraged but optional
Re–Referrals (My Activities View) on Dashboard

The TC (New) dashboard contains a view called My Activities. (or switch the view to “All Activities” to see agency-wide)

Displays **Re-referrals** that need follow-up (create a new case contact for these) then mark activity complete
Activities/Re-Referrals: Mark as Complete

- Activities/Re-referrals will show up as active reminders until you mark them complete
- Click on the activity in the Activities view or on the participant case
- Select “Mark Complete”
Return Case to HFS

- If you receive a participant case that is not appropriate for your agency, you may return that case/referral to HFS so it can be reviewed/redistributed.

- Could occur when the participant moves out of county or should be served by a different state agency due to specific needs.

1. Complete a Case Contact (A) first
2. Select “Send Case Back” in top menu on case page
3. Select a reason for sending case back and Provide a short but detailed description.
Informed Consent & Enrollment (B)
A participant is enrolled if, and only if, the participant (and/or guardian) has agreed to participate in MFP by signing the *Informed Consent* document.

The date of the participant’s signature on the Informed Consent is the date of enrollment.

*Two* original copies must be signed and dated by the participant (or proxy or guardian) prior to transition in order for the participant’s transition to be valid for MFP.

- One copy is given to participant/guardian
- One copy is kept for TC’s file
- Print/download: [http://nursing-mfp.webhost.uic.edu/process/forms/Informed_Consent.pdf](http://nursing-mfp.webhost.uic.edu/process/forms/Informed_Consent.pdf)
**Important**
Informed Consent Documentation

- **Informed Consent Signature Date** must be documented in CRM prior to the day of transition and cannot be the same date as the transition date.
  - This is **critical** for establishing eligibility and for initiating the process to obtain Medicaid claims.
- If not completed in a timely manner, **serious delays** in eligibility and reporting can occur.
- If the participant dis-enrolls and later wants to re-enroll, a new informed consent is needed.
Informed Consent in WebApp – Summarized

- TC moves to Informed Consent Stage
- Completes Informed Consent Outcome and Date
- TC Completes stage checklist
- TC uploads signed form to Attachments
- Enrollment Status=Enrolled
Move the Flag to Pre-Transition Stage

- Move flag to Pre-Transition as soon as you complete the Informed Consent documentation!
- Participant is now Enrolled.

Remember, the flag shows the current stage.

This button moves the flag as long as all requirements are completed! If the flag won’t move, some documentation may be missing.
Pre-Transition
Pre-Transition Stage

- Face Sheet (F)
- Medication and Supplies list (G)
- Risk Assessment and Mitigation Plan (H&I)
- 24 Hour Back up Plan (K)
- LOC Assessment (Level of Care, DON or LOCUS scores)
- Baseline QOL Survey Date
- Medicaid Claims – uploaded by UIC after enrollment
- Case Review – conference with UIC staff
- ANE Check
- Possible re-referral, enter a case note

PDF Versions of MFP Forms are available here: [http://nursing-mfp.webhost.uic.edu/process.shtml](http://nursing-mfp.webhost.uic.edu/process.shtml)
Pre-Transition Checklist

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>INFORMED CONSENT</th>
<th>PRE-TRANSITION (Active)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Face Sheet *</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Risk Inventory</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Medication Chart</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>24 Hour Backup Plan *</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Baseline QOL Survey Date *</td>
<td>1/22/2015</td>
<td></td>
</tr>
<tr>
<td>Case Review *</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Claims *</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>LOC *</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>ANE Check *</td>
<td>click to enter</td>
<td></td>
</tr>
</tbody>
</table>

After completing each item, click to update status to ‘Completed’.

All checklist items must be Complete or have a date before the stage can be advanced to Transition.
ANNE History Check

- Beginning April 2016, staff at IDoA’s BEAM unit check for history of substantiated ANE (abuse, neglect and exploitation) among ALL MFP participants that are Enrolled with Informed Consent & in the Pre-Transition stage in CRM.

- Move your cases to Pre-Transition stage as soon as Informed Consent is completed to allow plenty of time for ANE check.

- If you need the ANE Check expedited, send the MFP Case # to HFS.MFP@Illinois.gov and request the ANE check be expedited for upcoming transition.
The findings and date of ANE check are shown on the case. Cases with ANE should be further investigated.

Only IDoA staff can update the ANE fields.

The case cannot move to transition stage until this has been completed in the checklist.
Re-referral in Pre-Transition

- Enter a case note
- If participant is no longer going to proceed to transition, enter a dis-enrollment form
Participant moved to the community?

Move the Flag to Transition Stage!

- Click the NEXT STAGE button to advance to TRANSITION Stage

- Note: if participant does not/cannot move to the community, you can Dis-enroll them at this time. (See Dis-enrollment slides)
Transition Stage

- Enter Form C and Transition Date
- LOC Assessment update
- Form M – Incident Reports
- Form E – Address/Phone Change
- Form D – Dis-enrollment
- Case notes recommended at least monthly
- Attachments
- Possible re-referral, enter a case note
Transition (Form C)

- To be completed **on the day of transition or within 2 business days post-transition**
- Starts a 365 day clock of eligibility
- Includes:
  - Date of transition,
  - Housing information,
  - Community address,
  - Phone number
  - County and
  - Waiver, state plan and demonstration services.
Enter the date of transition on the case page/checklist and enter a Form C
Re-referral in Transition stage?

- Is participant 365 complete? A new case should be created by HFS

- Is participant currently an active enrolled transition in the community? Determine why a new referral was sent. Did participant become re-institutionalized without your knowledge? Check the date the referral was sent, is it old? Contact the referring person listed on the referral.

- Was participant previously transitioned and is now dis-enrolled? Someone submitted a referral for them. Participants can re-transition/re-enroll to finish 365.
Dis–Enrollment
Disenrollment/Withdrawal (Form D)

- Occurs anytime a participant is no longer enrolled
  - Pre-Transition Stage: A participant is no longer eligible, able or interested in transitioning.
  - Transition stage: Once a participant has been re-institutionalized for 30 days, participant dies, moves out of state, etc.
- Occurs only if Informed Consent has been signed (Enrolled)
Reasons for Disenrollment
Before MFP Transition

- Reasons for Disenrollment if BEFORE transition with MFP (No Form C entered):
  - Could not locate appropriate housing arrangement
  - Could not secure affordable housing
  - Death
  - Deterioration of cognitive functioning exceeds community resources and supports
  - Guardian refused participation
  - changed his/her mind
  - Did not choose MFP qualified residence
  - would not cooperate in the care plan development
  - Mental health needs exceeded capacity of program to meet them
  - Physical health needs exceeded capacity of program to meet them
  - Other reason:
Reasons for Disenrollment – After MFP Transition

- Reasons for Disenrollment if participant transitioned with MFP (Form C entered)
  - Re-institutionalized for 30+ days.
  - Moved
  - Death, Please indicate date of death: _____/_____/
  - No longer needed services
  - Other reason:

- Also indicate reason for re-institutionalization (if applicable)
  - Acute care hospitalization followed by long-term rehabilitation
  - Deterioration in cognitive functioning
  - Deterioration in physical health
  - Deterioration in mental health
  - Loss of housing
  - Loss of personal caregiver and no other caregiver could be identified
  - By request of parent or guardian
  - Lack of sufficient community resources and supports
Re-Enrollment or Re-transition after Dis-Enrollment

- If a individual was re-institutionalized for *greater than 30 days after transition and before his/her MFP graduation date*, then he/she is eligible to re-transition with MFP and use the remainder of the days left on his/her MFP clock.

- A new Informed Consent must be signed and the newer signature date must be documented in CRM.

- UIC and DMH/IDOA/DRS/DDD and HFS staff must be contacted and conferred with when persons who were previously dis-enrolled are now re-enrolling or re-transitioning so that unique processes can be followed for these situations.
Post–Transition Update
Post–Transition Update (Form E)

- Is completed
  - when there is a change in the member’s address or phone number
  - when there is a change in waiver or demonstration services
  - when there are calls for emergency back up, if a TC finds that a participant had to use their back-up plan for transportation, caregiver, meal services or emergency ambulance transport.
Transition Update (Form E)

Select Post-Transition Update (E)

Answer the four required questions with the red asterisk.

Then Click “Save” at the top of the form

Now you can proceed to input the information that has changed.

When finished, you can click Save & Close button to exit the form.
365 Complete

- When MFP participants complete 365 days in the community, their case is updated by UIC staff in CRM.
- No further documentation is required once 365 days is complete.
- Participants can transition a second time as long as they meet the Eligibility requirements.
  - A new referral needs to be submitted.
  - A new case would be created in CRM.
CRM MFP Terminology: Engaged vs Dis-Engaged

- **Contact Stage:** Considering MFP = Yes on Case/Most recent case contact
- **Informed Consent Stage:** All are Engaged while in this stage. See this slide
- **Pre-Transition:** Enrollment status=enrolled
- **Transition:** Enrollment status=enrolled, 365 Complete=No

- **Contact Stage:** Considering MFP = No on Case & Most recent case contact
- **Informed Consent Stage:** N/A. See this slide
- **Pre-Transition:** Enrollment status=Dis-enrolled
- **Transition:** Enrollment status=Dis-enrolled or 365 Complete=Yes
Other Functions & Features
Navigate CRM

Click on Dashboards or Microsoft Dynamics CRM to get to your default dashboard.

Click on Activities to see any Activities/Re-Referrals that may exist for your cases.

Click on MFP Cases to view many lists of Active cases organized in different ways (i.e., Engaged, Considering MFP, Not contacted, etc.) to which you have access.

These are useful areas to explore. Choose the down arrow next to HFS MFP to view the navigation menu.
Refresh CRM if you don’t see updates on the case, such as Enrollment Status, Stage updates, Recently added forms.
Click Refresh, once, twice or wait 30-60 seconds for cloud updates to populate the case.
Search for Participants

- Use any search box on any page
- If you are searching for Florence Jones, you can enter:
  - Florence
  - Jones
  - *Florence J
  - *Florence Jones
- You can also find a participant by entering the case number, e.g., MFP-001001
Level of Care (LOC) Assessment

The LOC records the DON or LOCUS, DDD LOC scores which help determine MFP Eligibility.

On the Participant’s Case, click “Update Assessment” in the top menu. A new Tab or Window will open.

Enter Assessment Date, Scores and comments.

Click Next and Finish.
View Latest Assessment

- You may have to refresh your browser to view the Assessment after you enter it the first time.
- Update the LOC assessment as required by your agency policy.
Sharing Cases

- Sharing cases: If you need to share your case with a different agency, contact UIC or HFS for assistance
- Select “Share” from the More Commands ... menu on the case page to see who a case has been shared with

Attachments:
- Max file size is 10 MB
- Allowed file types include: xls, ppt, doc, pdf, jpg/gif/png
More Resources

- Informed Consent:
  - [http://nursing-mfp.webhost.uic.edu/process/forms/Informed_Consent.pdf](http://nursing-mfp.webhost.uic.edu/process/forms/Informed_Consent.pdf)
Questions and Help

- HFS: CRM Help/Referrals/Password Reset: HFS.MFP@Illinois.gov

- Training: http://nursing-mfp.webhost.uic.edu/mfp_training_intro.shtml

- All MFP Contact Information: http://mfpweb.nursing.uic.edu/contact.pdf