

| Pre-visit Implementation Plan – Mid-Year Review 3.0   2011            |   |  |             |   |  |
|---|---|--|-------------|---|--|
| Activity  | MCM Standard Met                          | Typically Done By                              | Assigned To | Benefit of Action   | Tools:<br><a href="http://www.scdhec.gov/rwhopwa">www.scdhec.gov/rwhopwa</a> |
| <b>2.1 Prior to Scheduled Visit</b>                                   |   |  |             |   |  |
| Each day, obtain a list of clients 2-5 days prior to MCM visit        |   | Support Staff, Medical Case Manager            |             | Time Management ,   |  |
| For each client, determine if income documentation has been submitted | MCM 1.2 and 1.3 (intake and reassessment) | Support Staff, Medical Case Manager            |             | De-duplication of effort  | Provide Enterprise – Client Service Profile – Tab                            |
| For each client on the list, complete the Pre-Visit Checklist (below) | Relates to Clinical Standards             | All disciplines may be engaged do some portion |             | Multi-disciplinary coordination<br><br>De-duplication of effort |  |
|   |   |  |             |   |  |

| 3.1 Pre-visit Checklist  |  |   |             |  |  |
|--|--|---|-------------|--|--|
| Activity   | MCM Standard Met                           | Typically Done By                           | Assigned To | Benefit of Action  | Tools:<br><a href="http://www.scdhec.gov/rwhopwa">www.scdhec.gov/rwhopwa</a> |
| a) Open the client profile:<br>b) Review Service/ Visit History<br>c) Review Required Actions<br>Coming Soon: d) ADAP Returned Mail, non-adherence, & Recertification alerts                     |  | Medical Case Manager                        |             |  |  |
| e) Retrieve recent referrals for this client<br>f) Contact referrals to confirm client adherence   | MCM 2.3 Referral-follow up within 30 days) | Support Staff,                              |             |  |  |
| g) Create Medical Encounter<br>Verify that clinical information is posted for the client.<br>If not posted, obtain signature for authorization from client when he arrives for visit. (2-5 days) |  | Medical Case Manager                        |             | Medical Monitoring<br>Provides client signature for release of medical record. | PE TA (Training module, Session 1: Medical Encounter Form)                   |
| h) Print "Patient Clinical Summary and <u>file in chart.</u><br>i) Discuss clinical aspects with client.   | MCM 2.1 (Mid-Year Review)                  | Medical Case Manager, Peer Health Navigator |             | Empowers patient to manage health care   | PE TA (Training module, session 1: Medical Encounter Form)                   |

| <b>3.2 Scheduled Visit Check-in</b>  |                         |                            |                    |   |   |
|--|-------------------------|----------------------------|--------------------|---|---|
| <b>Activity</b>  | <b>MCM Standard Met</b> | <b>Typically Done By</b>   | <b>Assigned To</b> | <b>Benefit of Action</b>                        | <b>Tools:</b><br><a href="http://www.scdhec.gov/rwhopwa">www.scdhec.gov/rwhopwa</a> |
| Confirm client address and telephone; employment status, change in Insurance coverage; Medical Care Provider |                         | Support Staff, Scheduling  |                    | Improves retention outcomes                     |   |
| <b>3.2 Mid-Year Review Interventions</b>   |                         |                            |                    |   |   |
| <b>Activity</b>  | <b>MCM Standard Met</b> | <b>Typically Done by</b>   | <b>Assigned To</b> | <b>Benefit of Action</b>                        | <b>Tools:</b><br><a href="http://www.scdhec.gov/rwhopwa">www.scdhec.gov/rwhopwa</a> |
| HIV Knowledge Screening  | MCM 2.1 Mid-Year Review | Peer, Medical Case Manager |                    | Gauges level of intervention                    |   |
| Action Plan Review   | MCM 2.1 Mid-Year Review | Medical Case Manager       |                    | Evaluates effectiveness of plan                 |   |
| Most Recent CD4 and Viral Load   | MCM 2.1 Mid-Year Review | Included Below             |                    | Measures adherence to treatment                 |   |
| Clinical Summary   | MCM 2.1 Mid-Year Review | Included Below             |                    | Empowers client to manage own health care       |   |
| Assess eligibility for long-term payer   | MCM 1.3 Reassessment    |                            |                    | Ensures continuous access to care and treatment | Benefits Assessment Tool  |
|  |                         |                            |                    |   |   |

| 3.3 Document Encounter – Post Visit   |   |                                    |             |  |  |
|---|---|------------------------------------|-------------|--|--|
| Activity  | MCM Standard Met  | Typically Done By                  | Assigned To | Benefit of Action  | Tools:<br>www.scdhec.gov/rwhopwa   |
| Create Progress Log; Contact Type “Medical Case Management”<br><br>Funding Source = “Ryan White”                                | MCM 4.1 (documentation)                                 | Medical Case Manager               |             | Ensures documentation for client-level reporting.              | Appendix I: MCM Progress Log Documentation for PE (provides definition of contact type and identifies which service should be used if applicable)                            |
| <b>a) Goals Addressed</b> - Link visit to goal(s) in the Action Plan.   | MCM 2.2 (Action Plan)                                   | Medical Case Manager               |             | Evaluates effectiveness of plan.                               | PE Action Plan Manual Goals Addressed  |
| <b>b) Services Provided</b> – Enter as appropriate for the visit with client  | MCM 4.0 (Documentation)                                 | Medical Case Manager               |             | Ensures documentation of a wide-range of services.             | RW Service Definitions<br>Core vs Support Services<br>Statewide Master Service Glossary (provides definition of SC services)<br>Agency service glossary (agency definitions) |
| <b>c) Care Actions &amp; Applications</b> – Enter as appropriate for the visit with client                                      | MCM 4.0 (Documentation)                                 | Medical Case Manager               |             | Serve as, quality markers for Medical Case Management services |  |
| <b>d) Referrals</b> – Create Referrals made in this visit.<br><br>Related Item: Services Provided labeled to “Connection to...” | MCM 2.3 (referral tracking-follow up on within 30 days) | Support Staff/Medical Case Manager |             | Ensures continuous engagement                                  | PE Referrals 101- Pending Revision   |
|   |   |                                    |             |  |  |

| 3.4 Supervisor Review Process  |  |  |             |  |  |
|--|--|--|-------------|--|--|
| Activity   | MCM Standard Met                                       | Typically Done By  | Assigned To | Benefit of Action  | Tools:<br>www.scdhec.gov/rwhopwa                           |
| Monitor visit frequency  | MCM 2.1 Mid-Year Review,<br><br>MCM 1.3 (Reassessment) | Lead Medical Case Manager/Medical Case Management Supervisor |             | Ensures continuous follow-up   | Reports in PE – More information coming soon               |
| 3.5 Documentation Process Checklist -Post- Clinic Visit  |  |  |             |  |  |
| Create Medical Encounter and enter clinical activities provided during Visit to Medical Care   | MCM 2.1 Mid-Year Review                                | Clinical Support Staff                                       |             | Ensures documentation of clinical quality for client-level reporting and SC Quality Management, in accordance with Program Guidelines.         | PE TA (Training module, session 1: Medical Encounter Form) |
| Medical Encounter – “Encounter” type =“Monitoring” or “Medical Care”<br><br>Note:<br>1) “Monitoring” should be used in the Medical Encounter for pre-visit activities<br>2) “Medical Care” will report as an “Outpatient Medical Visit” & should only be used when agency is provider or |  | Clinical Support Staff                                       |             | “Monitoring” allows tracking of time spent entering/reviewing quality activities<br><br>“Medical Care” allows tracking of time with clinician. | Agency service glossary (agency definitions)               |

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|--|--|--|--|--|--|
| payer for medical services   |  |  |  |  |  |
| <b>3.6 Shortcuts: Provide Enterprise (PE)</b>  |  |  |  |  |  |
| a. Medical Encounter – Sample text may be used in the notes section for Medical Encounters. Submit the sample language you wish to use. It will be added to list of text.                      |  |  |  |  |  |
| b. Informed Consent – Default Templates can be established to auto-select items for release to a particular organization. Demo this feature by testing an Informed Consent to ADAP Enrollment. |  |  |  |  |  |
| c. Standardize Documentation in Medical Encounter (e.g.) time in minutes, Encounter Type   |  |  |  |  |  |
| d. Action Plan Templates may be added or customized by agency request.   |  |  |  |  |  |
| <b>Qualitative: Provide a response to the questions below:</b>   |  |  |  |  |  |
| 1. Document your agency's process to obtain information specific to clinical services at prior to each visit.  |  |  |  |  |  |
| 2. Document any problems you experienced while implementing any of the above processes, e.g. Informed Consents.  |  |  |  |  |  |
| 3. How can solutions to these problems be integrated into the Pre-visit process?   |  |  |  |  |  |
|  |  |  |  |  |  |