CarePlus PROGRAM

PROGRAM ENROLLMENT, CARE PLANNING, PROGRAM AND CPP EXIT

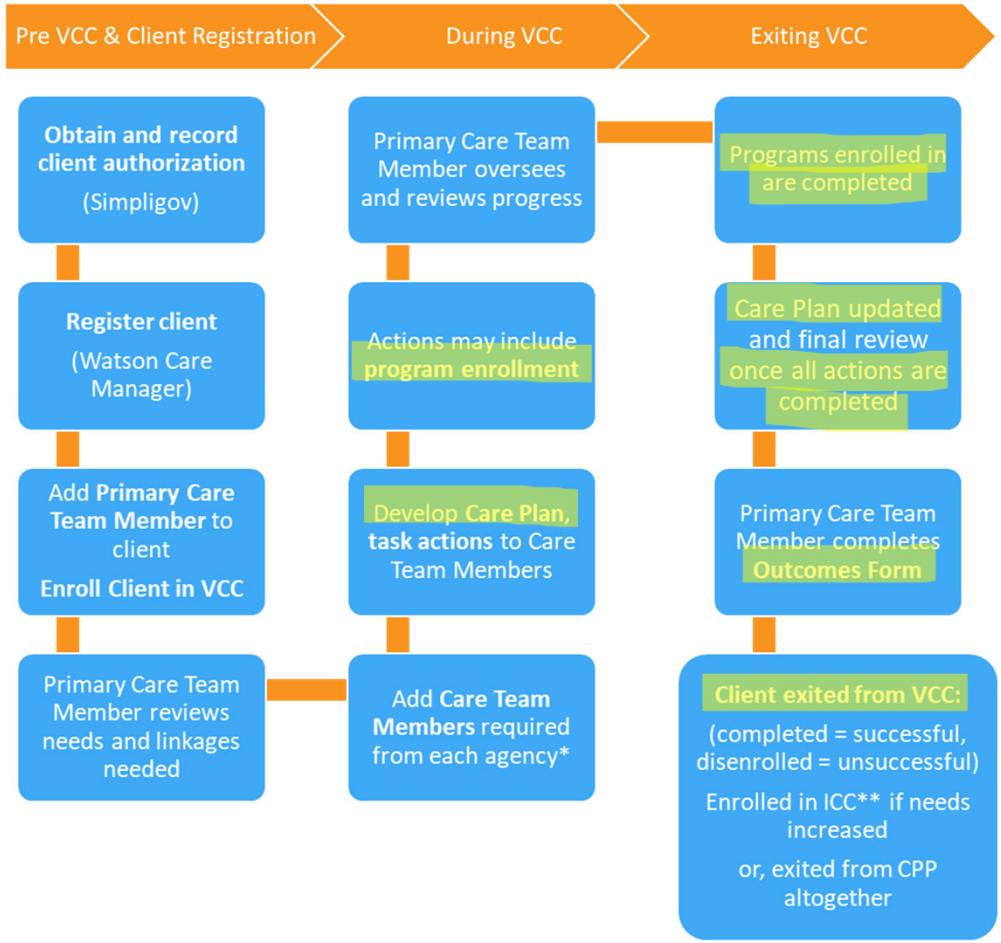
Watson Care Manager
Training Session

WORKFLOW PROCESSES

- Assigning and enrolling a client in to a WCM program (focus on VCC & ICC)
- Creating a clients Care Plan
  - Adding goals and actions (predesigned for CPP and option to add bespoke)
  - Assigning actions to care team members
  - Updating on progress and closing out actions
- Exiting a client from WCM program/s
  - Reviewing client care plan and goals before exit
  - Completing an Outcomes form for the client
  - Deactivating the client once they have exited all WCM programs and are no longer receiving care coordination under the Care Plus Program

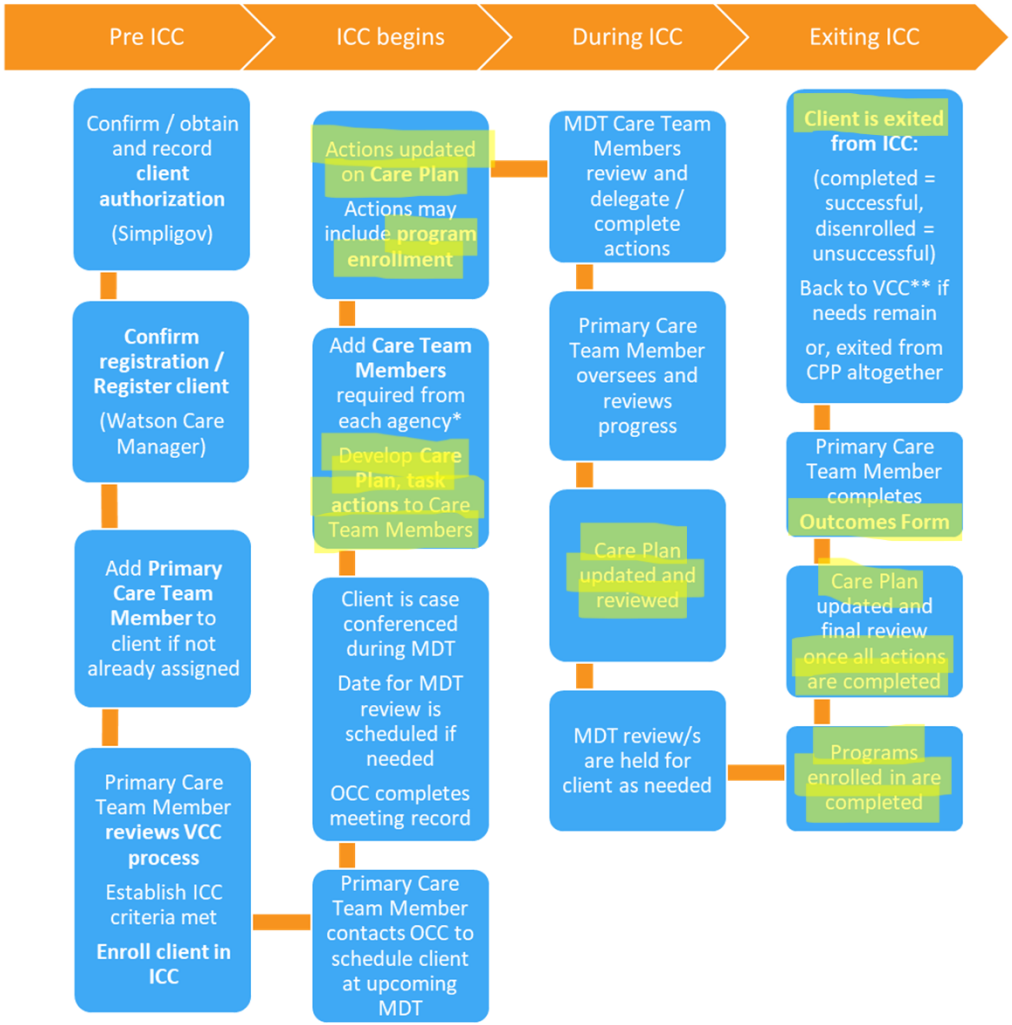
Virtual Care Coordination (VCC) Workflow

A Care Plus Program client will normally be enrolled in VCC initially. If ICC criteria is met, refer to ICC workflow. A client may also return to VCC following a decrease in need after a period receiving ICC.



Intense Care Coordination (ICC) Workflow

A client may enter ICC after a period of receiving VCC when needs have increased, or they may be enrolled directly when ICC criteria has already been met.



ASSIGNING AND ENROLLING CLIENTS IN PROGRAMS

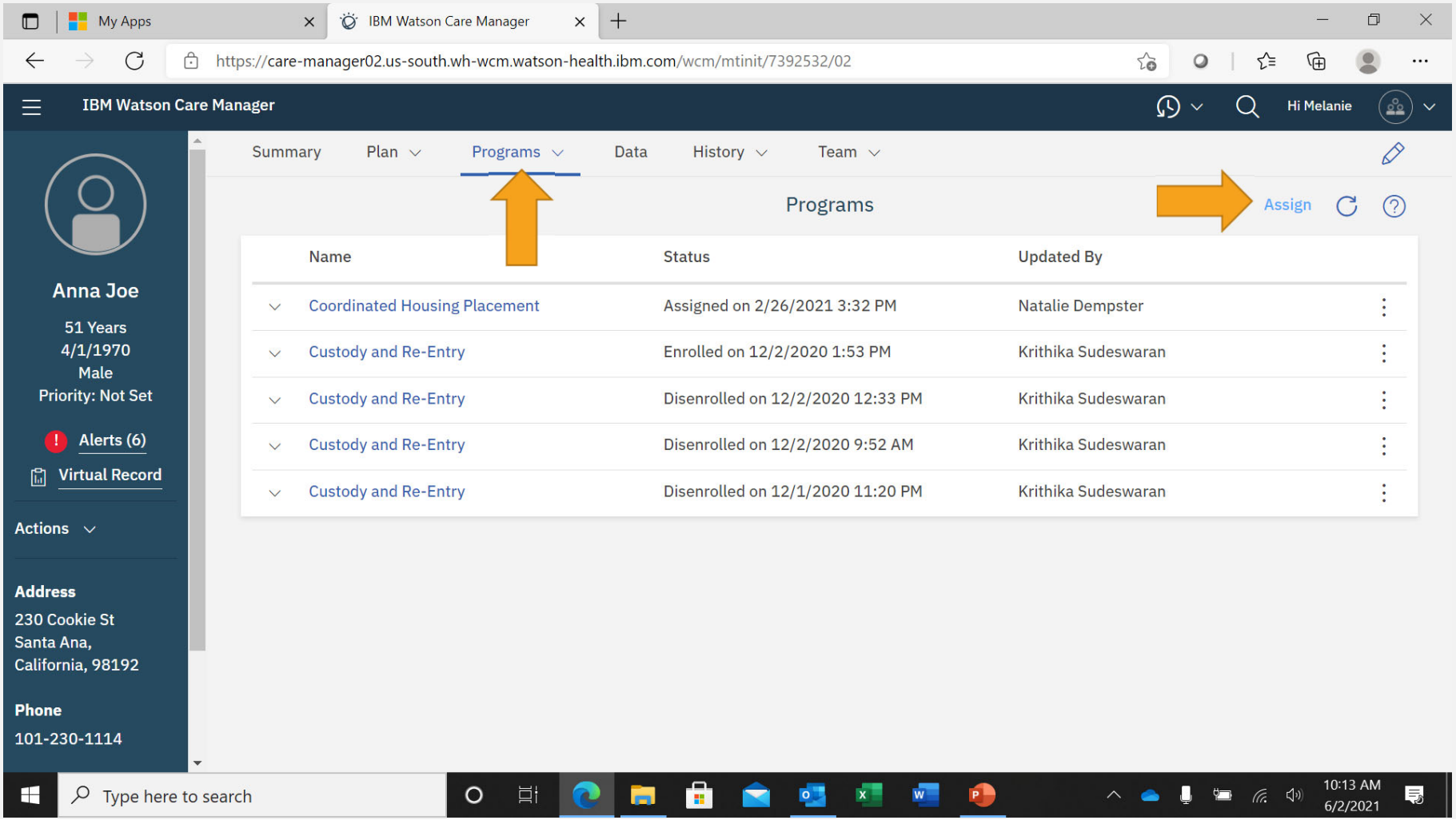
There are 2 steps to entering a client in a WCM program

- **Step 1 is assigning the program:**
  - Assignment is in the case of programs with certain eligibility criteria, where the client may need an assessment to determine their eligibility (not currently being used), prior to program acceptance and enrollment

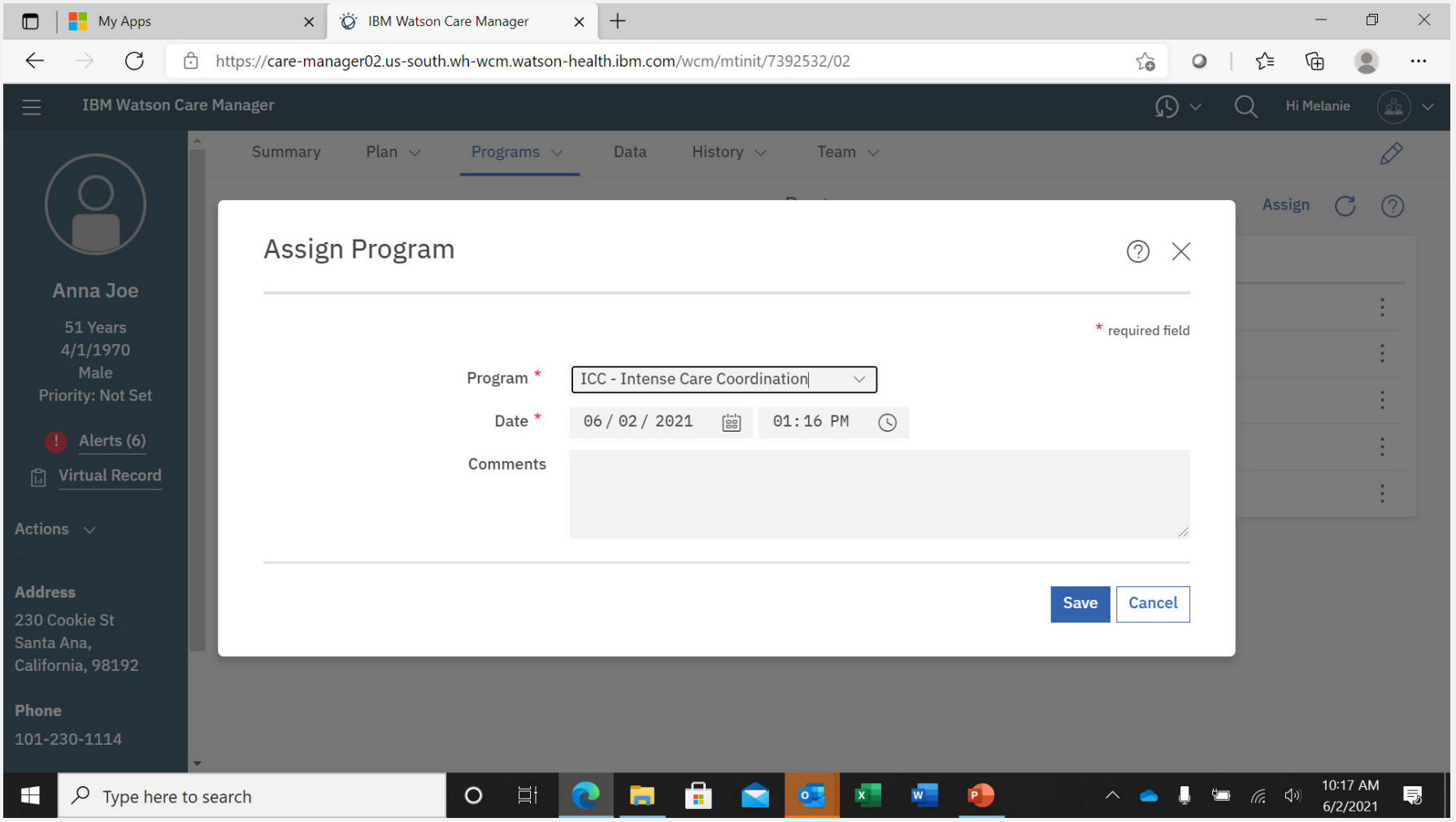
- **Step 2 is enrollment in to the program**
  - Any WCM program can proceed straight to enrollment (as we are not currently completing any eligibility assessments)

Both steps, the program assignment and enrollment, must be completed

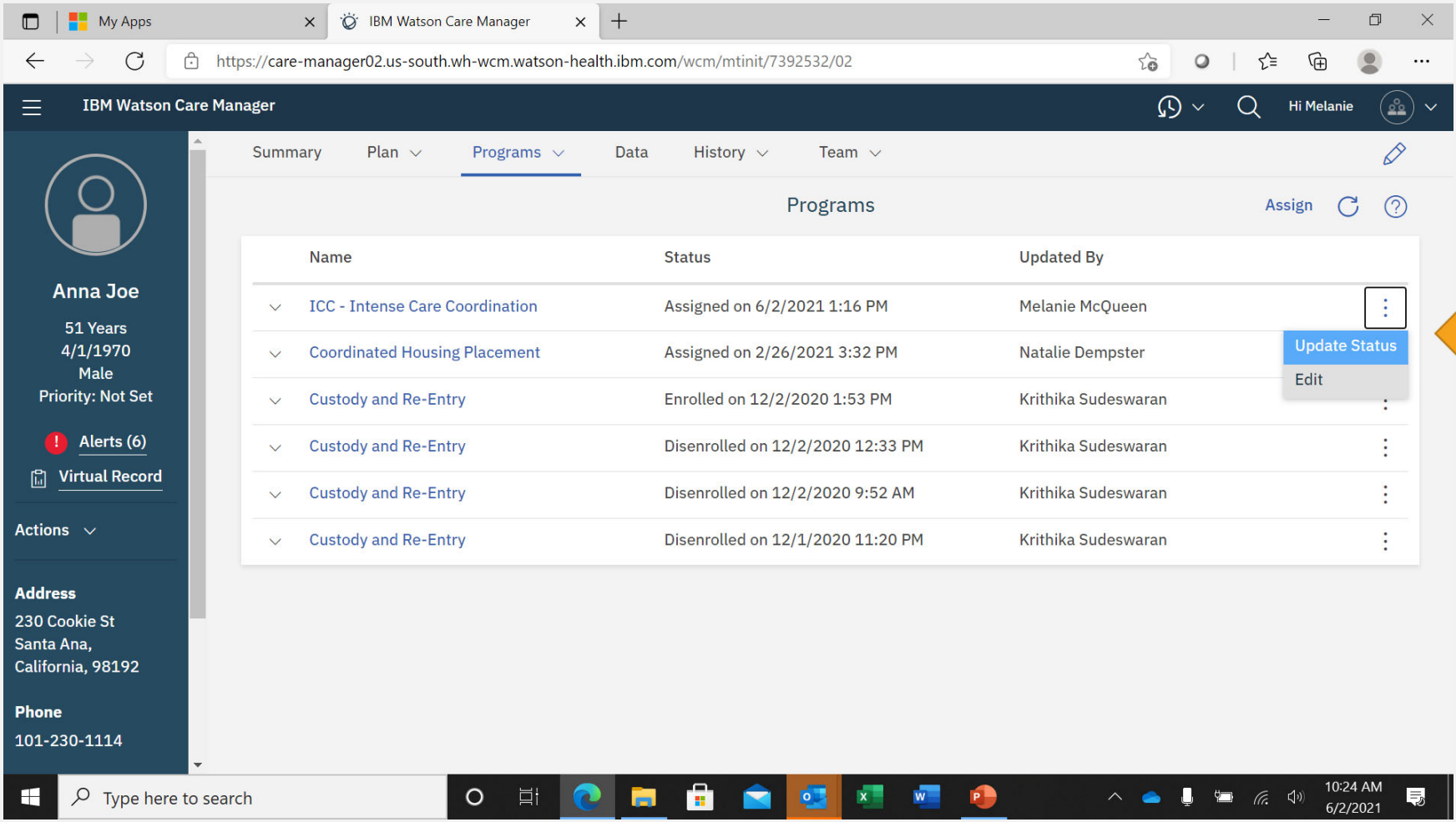
STEP 1 – ASSIGN PROGRAM: SELECT THE 'PROGRAMS' TAB AND CLICK 'ASSIGN'



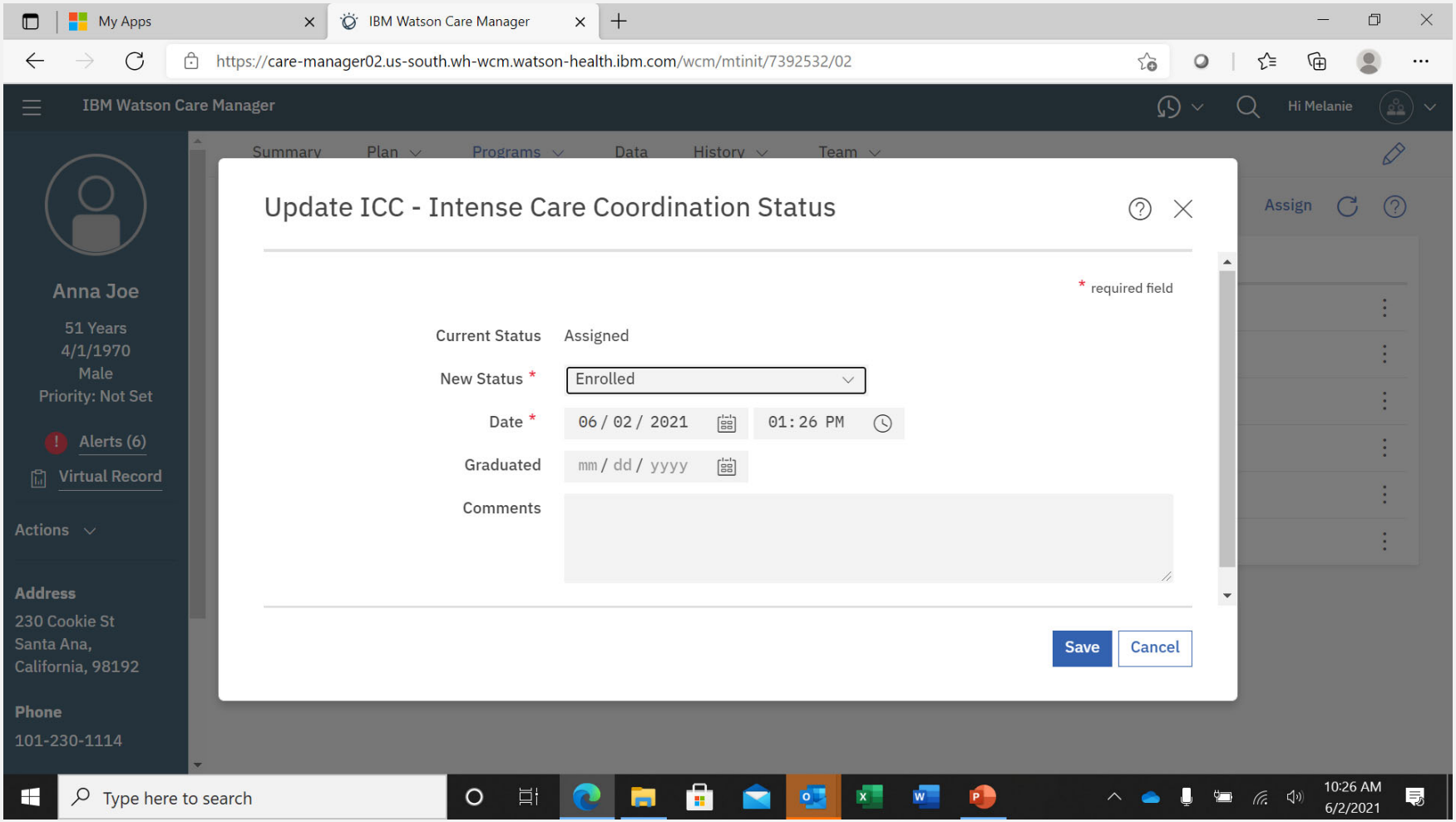
ASSIGN THE RELEVANT PROGRAM, ENTER DATE STARTED, CLICK SAVE



STEP 2 – PROGRAM ENROLLMENT: PROCEED STRAIGHT TO ENROLLMENT BY UPDATING PROGRAM STATUS



SELECT ENROLLED, DATE STARTED AND CLICK SAVE



NOTES ON ENROLLING CLIENTS IN PROGRAMS

- Program enrollments are one of the key **linkages** measured in the Care Plus Program
  - Enrollment timescales are important – once a client is registered in WCM, the expectation is that they are enrolled in relevant programs (at a minimum VCC or ICC depending on need) within an appropriate timeframe (30 day target)

- The start and end dates / program duration is monitored as a measure of **expedited service delivery**
  - Length of service / time in programs is also important – ensure dates are accurate and program enrollments are exited in a timely manner once the client leaves that program

CLIENT IS NOW ENROLLED IN RELEVANT PROGRAM

CREATING A CARE PLAN IS NEXT…

STRUCTURE OF CARE PLAN

Goals are the overarching area of need we're working on with the client

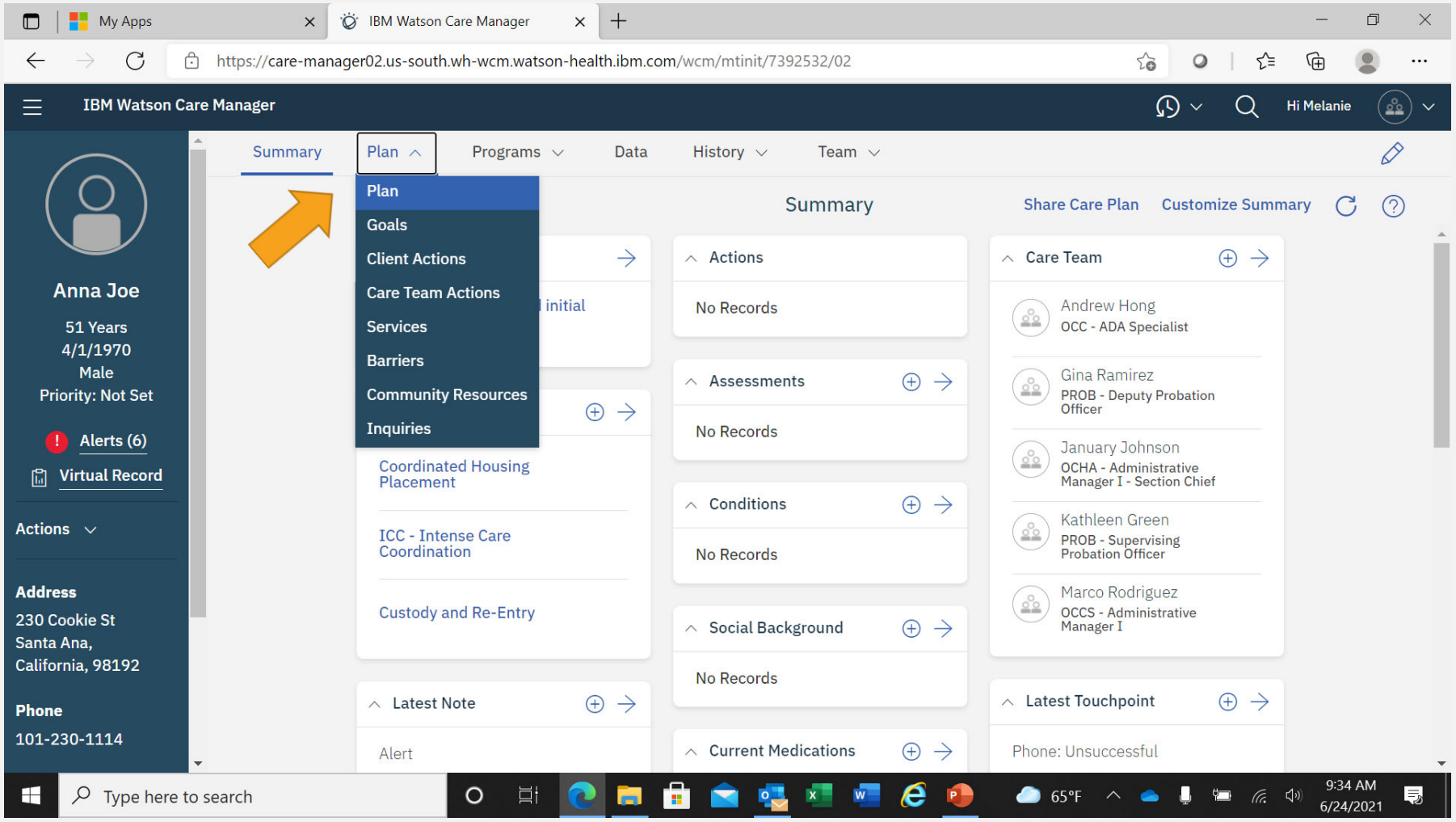
Activities / **Actions** are the steps taken to meet that need

- Each action must be attributed to a goal
- We have predesigned goals and actions for CPP
- Closing out is required for each action (progress updates are optional), before a client is exited from VCC or ICC programs and deactivated from CPP

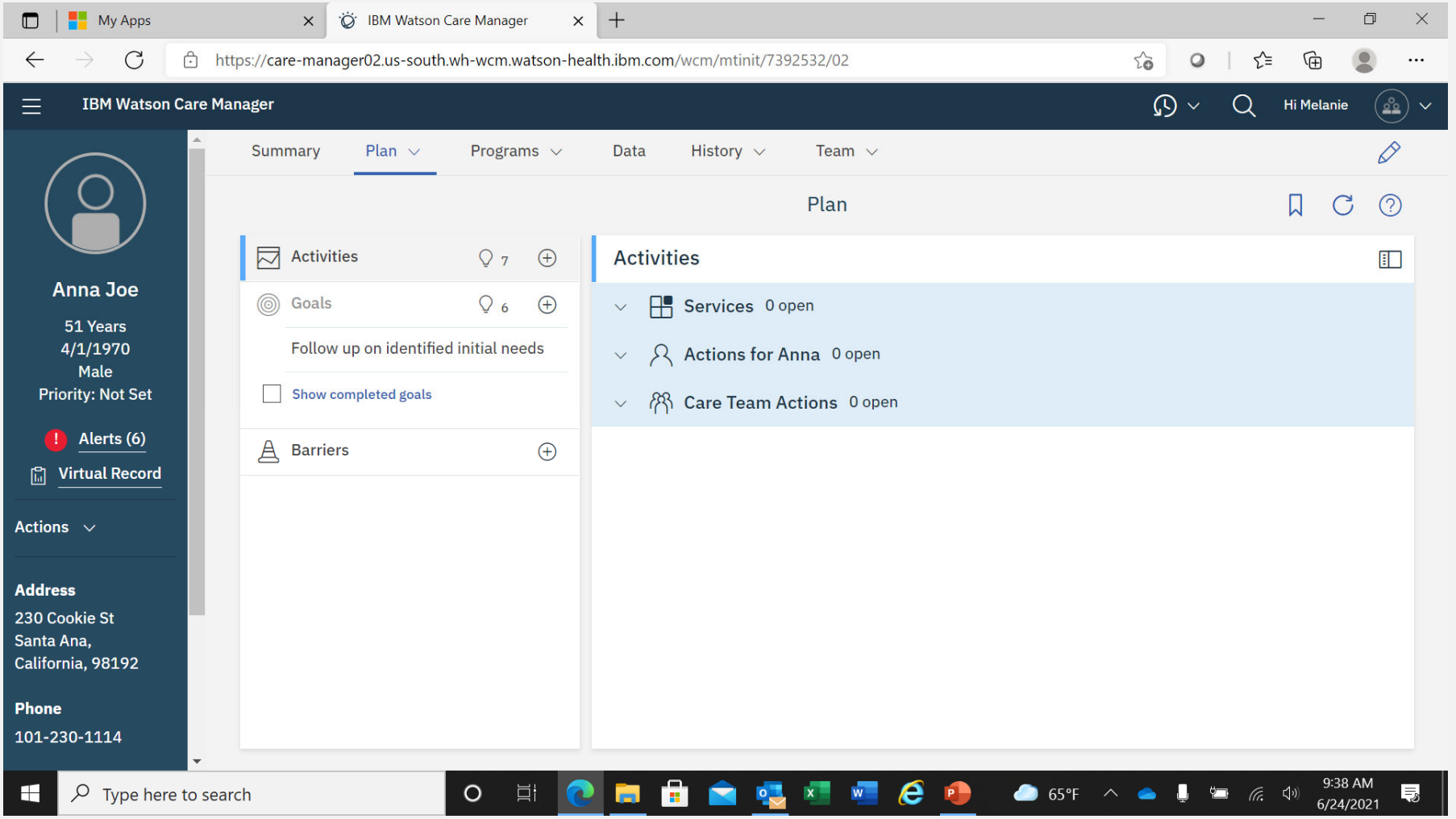
PREDESIGNED GOALS AND ACTIONS FOR CPP

Goals	Activities / Actions
Behavioral Health	Referral for behavioral health screening and assessment
	Support client engagement in accessing behavioral health treatment
	Linkage to behavioral health outreach
	Linkage to Behavioral health services / treatment provider
Benefits and Supportive Services	Support client to maximize eligible income
	Referral for Social Services benefits eligibility assessment
	Support client to manage and maintain budget
	Support client to reduce debts / arrears, establish payment plans
Correctional Health	Referral to substance use, co-occurring disorder screening and assessment
	Linkage to substance use, co-occurring disorder services / treatment provider
	Support client to prevent self-harm or suicide
	Support client engagement in substance use, co-occurring disorder treatment
	Plan and support clients reentry, including treatment access, from custodial setting
Healthcare	Referral to healthcare screening and assessment
	Linkage to healthcare services / treatment provider
	Support client to better manage chronic health conditions
	Support client in obtaining diagnosis and treatment planning
	Plan and support client discharge from healthcare setting
Housing	Complete Coordinated Entry System (CES) status check
	Linkage to street outreach
	Referral to Shelter, coordinate housing placement
	Linkage to housing services / provider and housing navigation
	Linkage to Emergency Rental Assistance / Program
Probation	Support client to comply with community corrections requirements
	Plan and support clients reentry from custodial setting
	Support client to manage and reduce risks

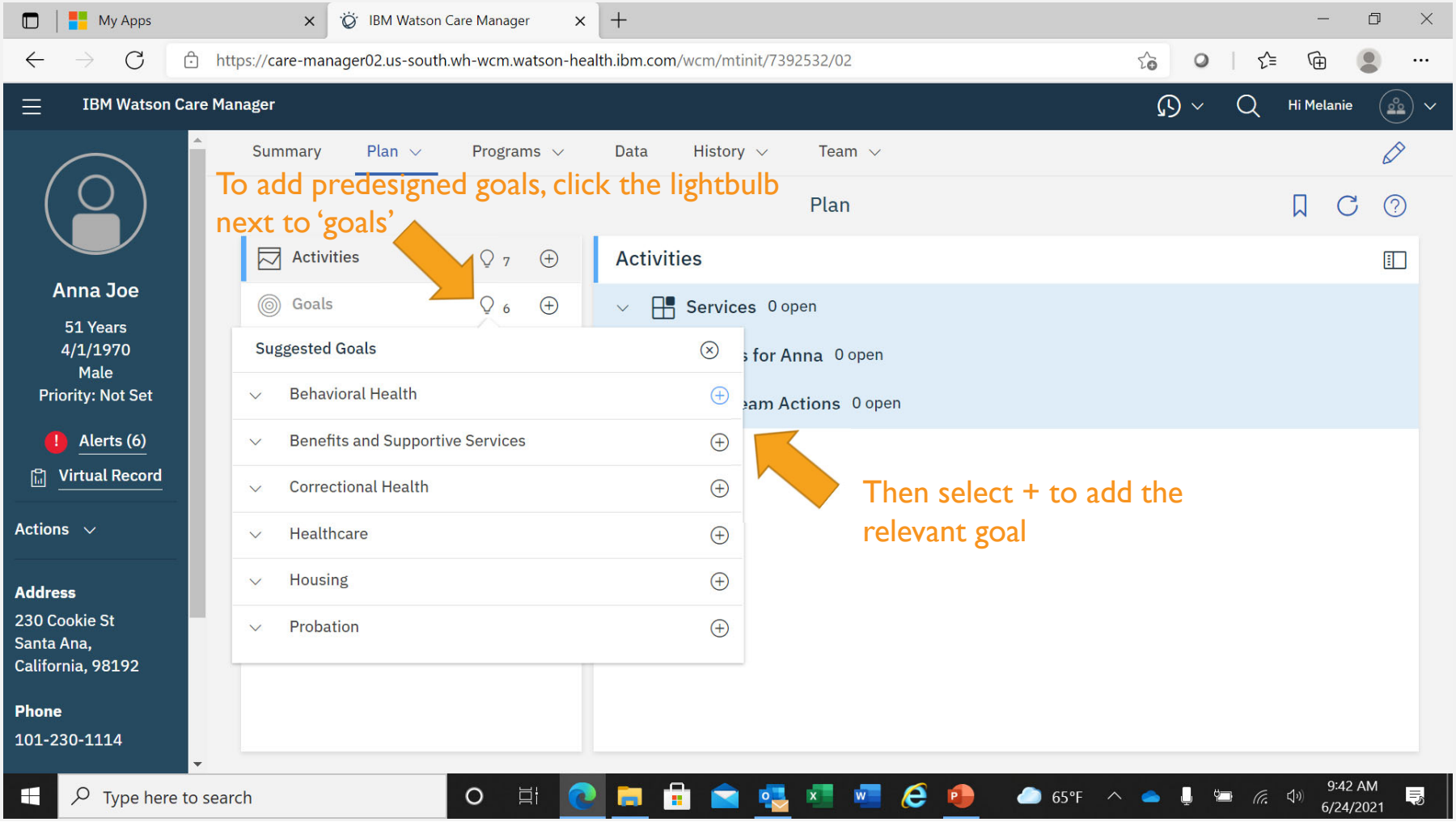
CREATING A CARE PLAN: SELECT 'PLAN' FROM THE CLIENT'S SUMMARY PAGE



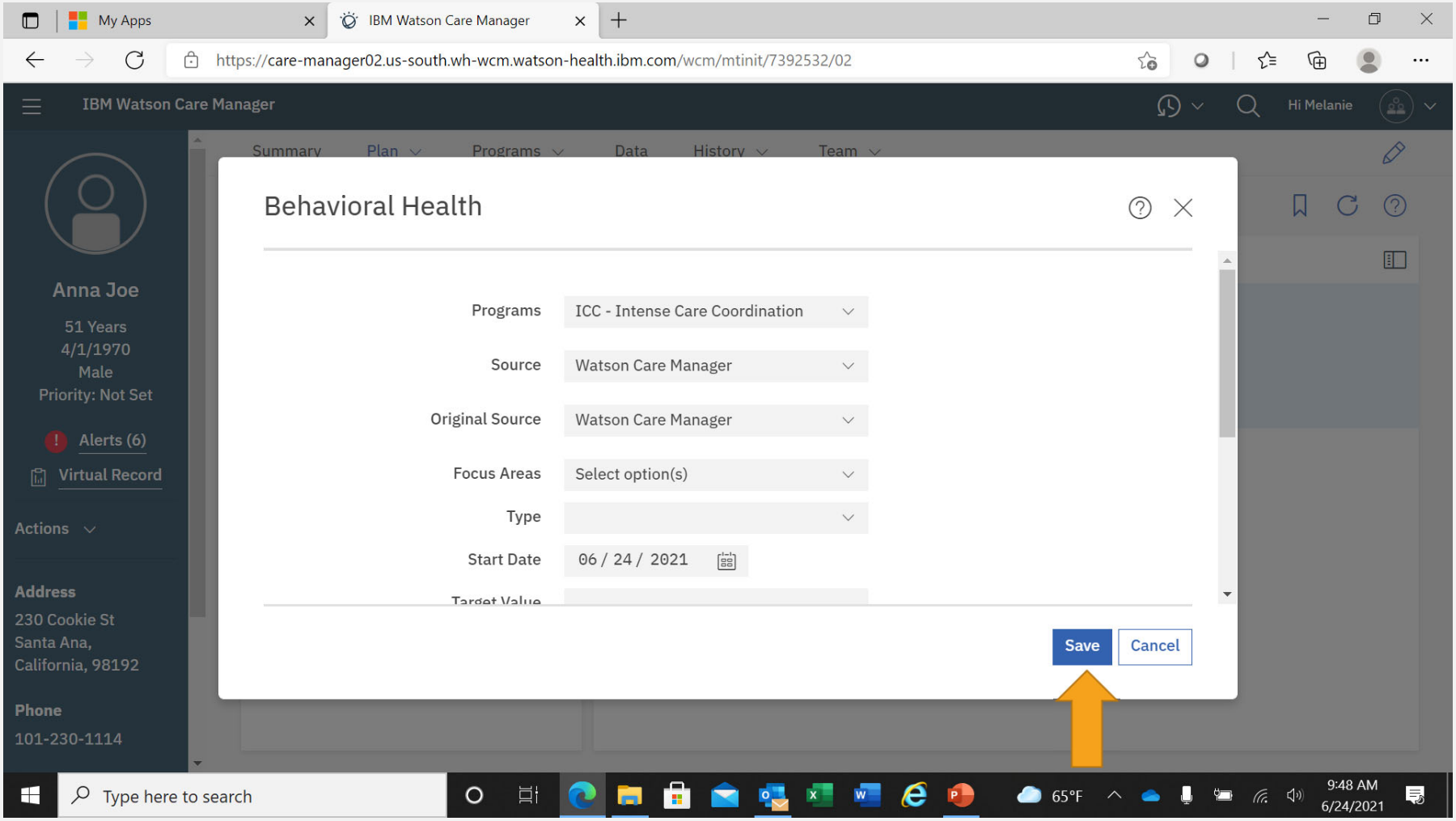
OPENS THE CLIENTS CARE PLAN PAGE



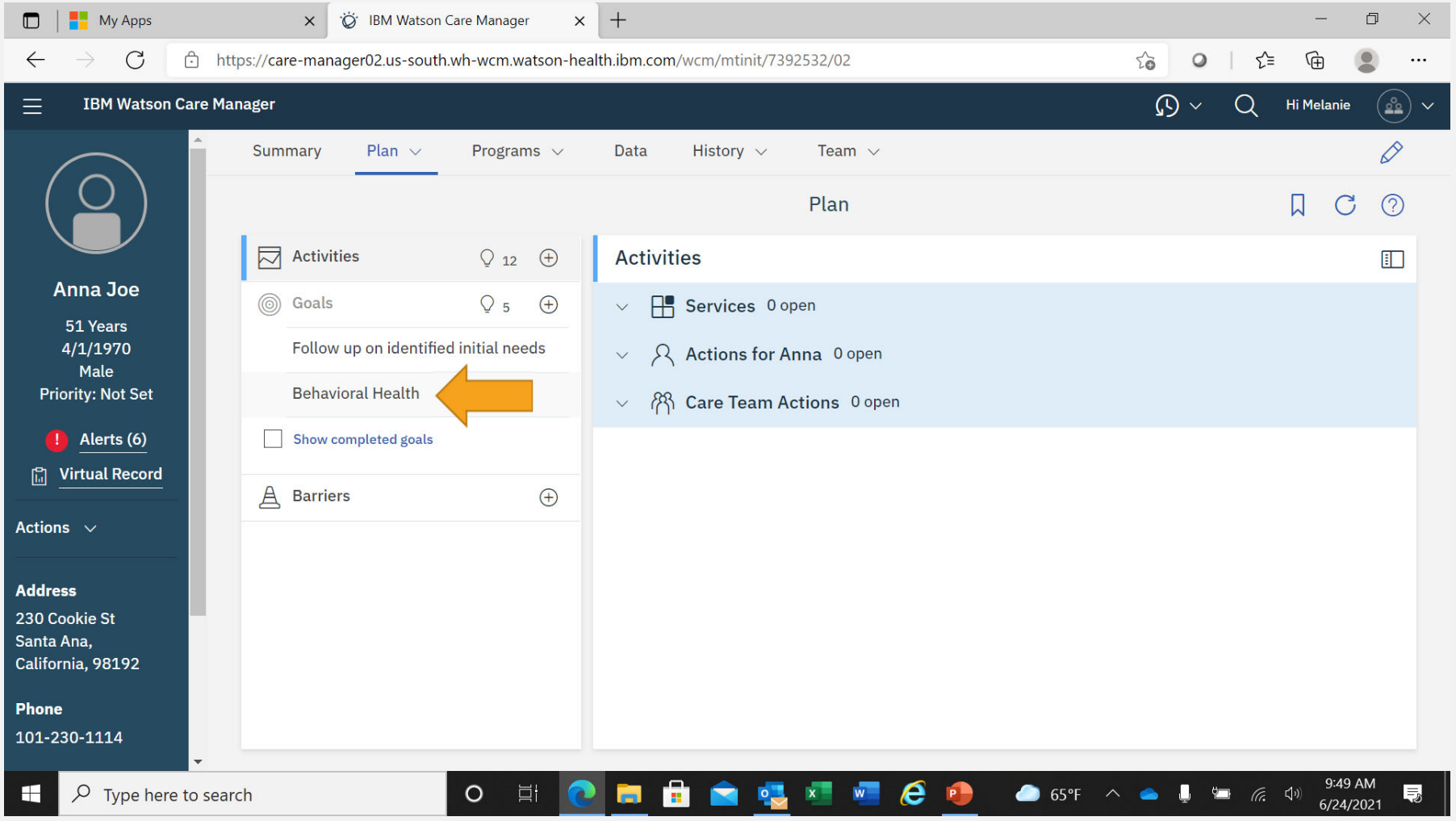
ADD RELEVANT GOALS TO CARE PLAN



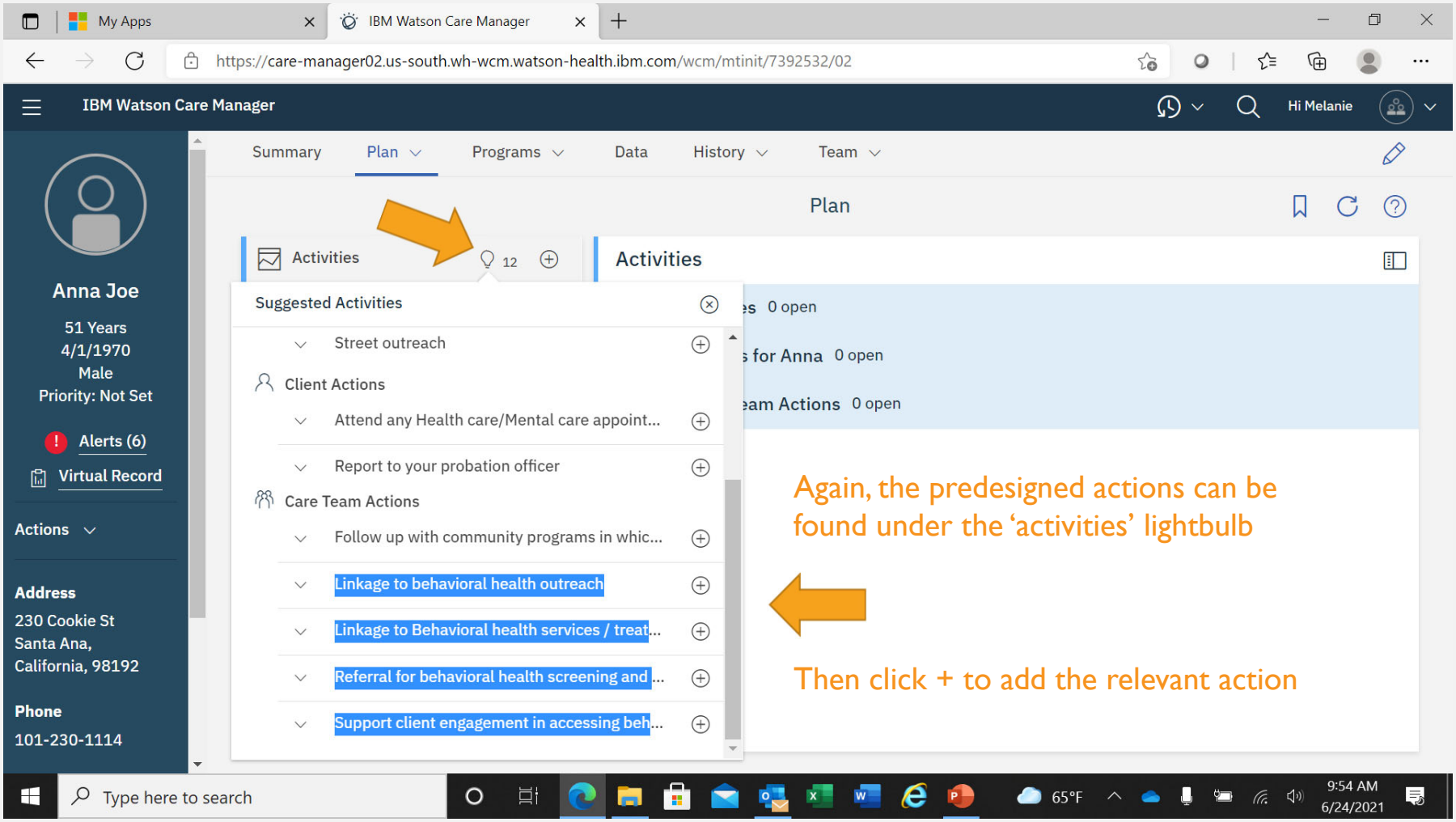
CLICK SAVE TO ADD THE GOAL TO THE CLIENTS CARE PLAN



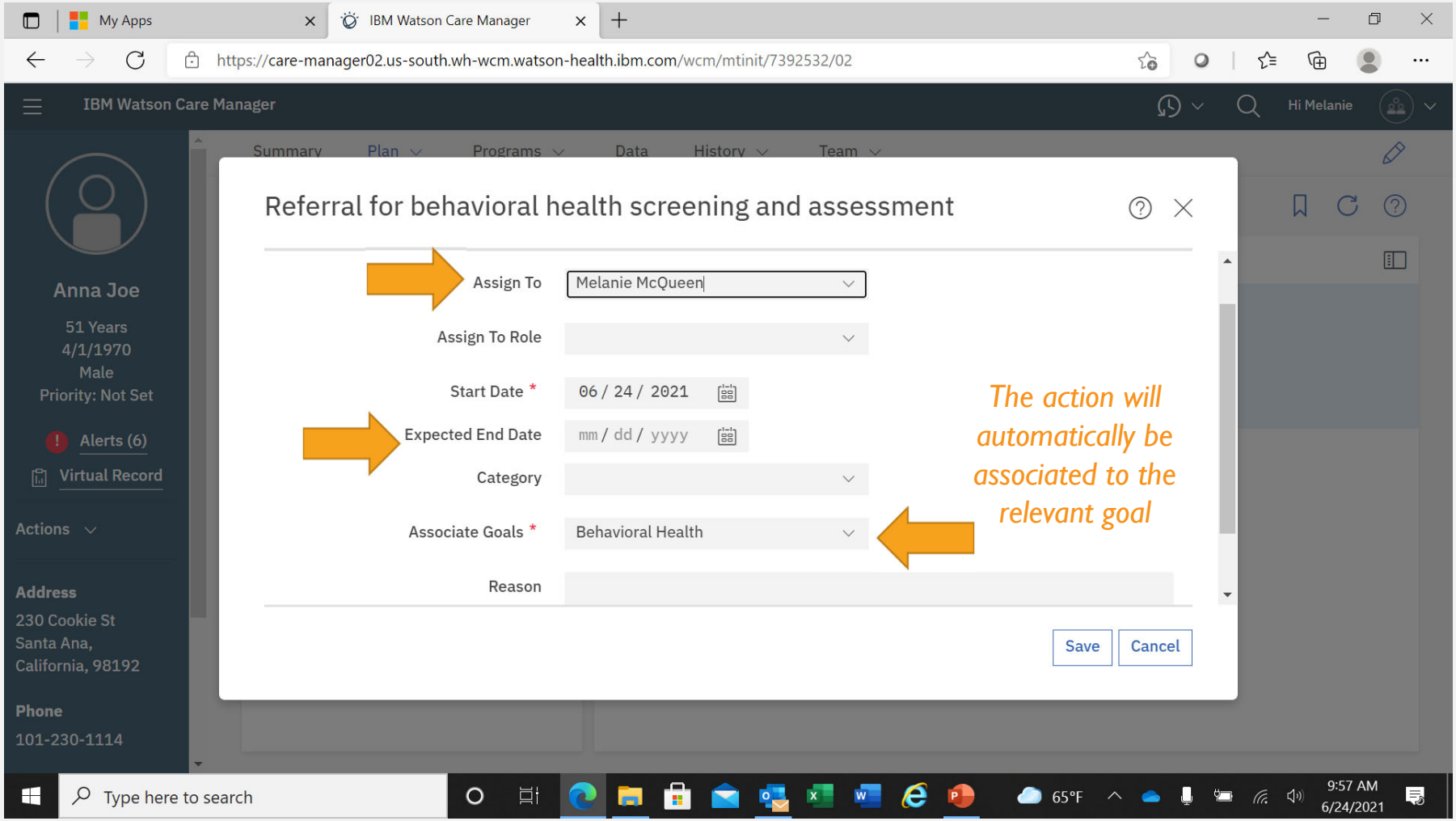
THE GOAL IS NOW VISIBLE ON THE CLIENT CARE PLAN PAGE



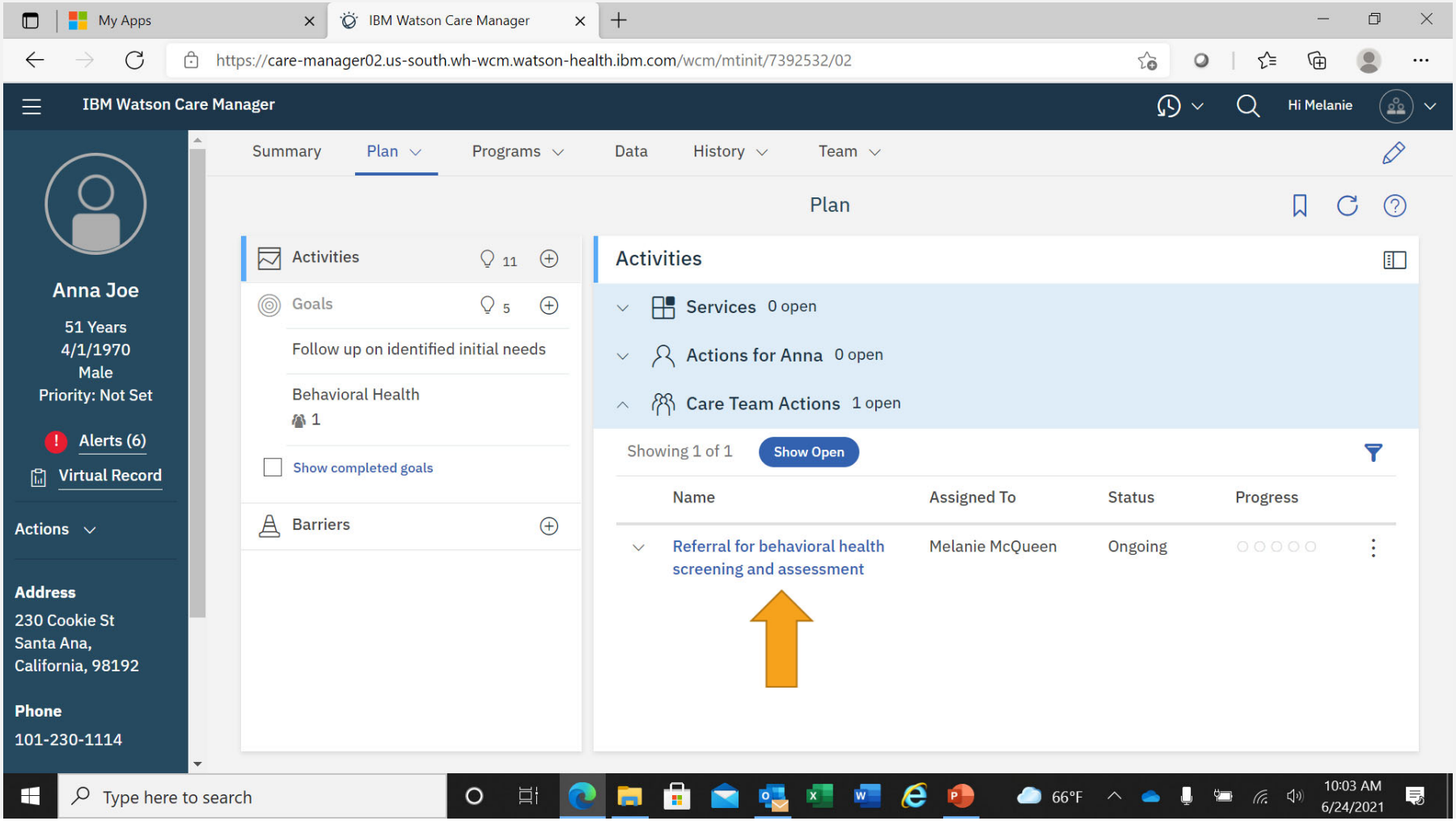
NEXT, ADD ACTIVITIES (ACTIONS) TO THE CLIENTS CARE PLAN



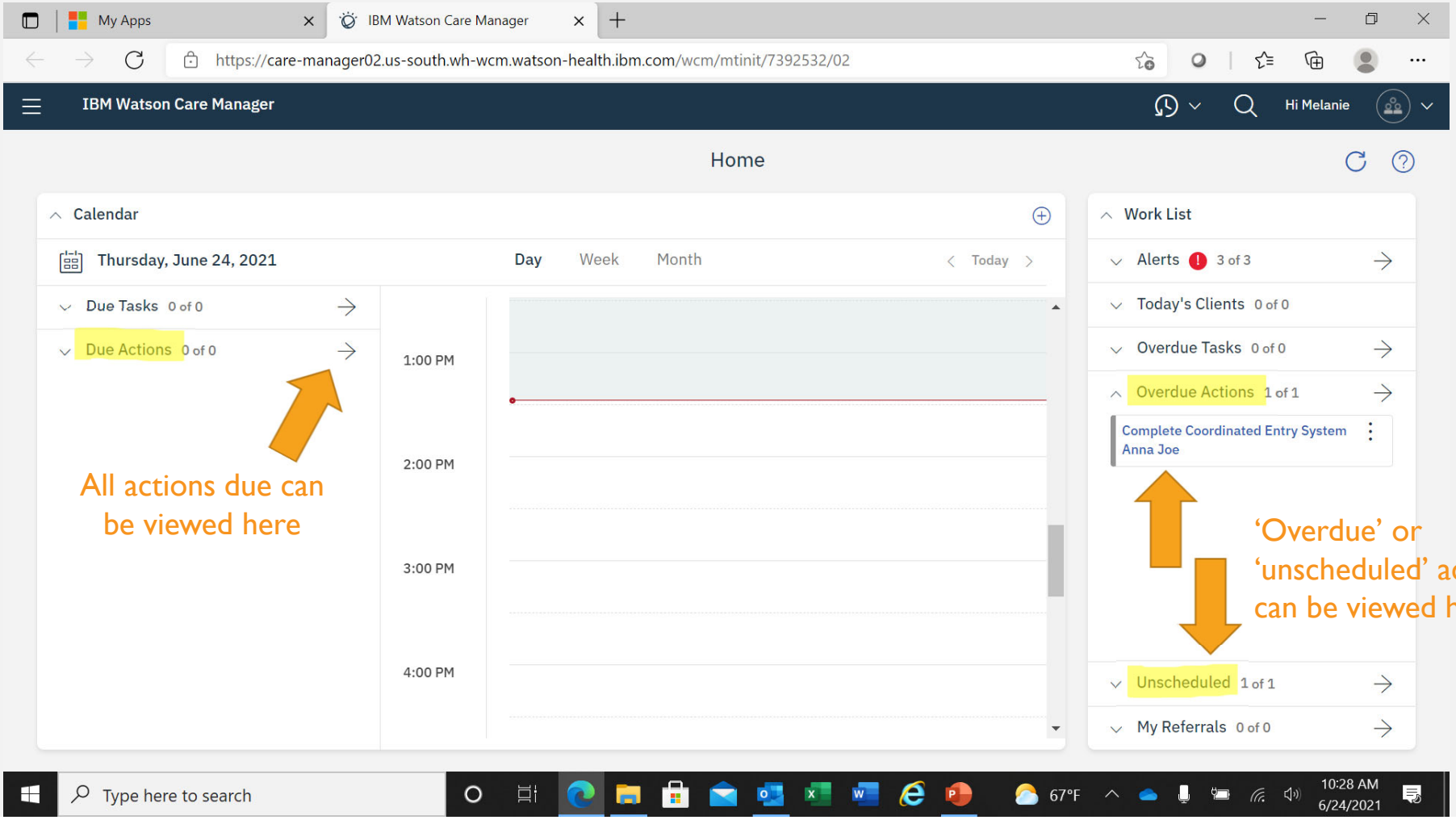
YOU CAN ASSIGN THE ACTION TO A CARE TEAM MEMBER AND ADD TIMEFRAME FOR COMPLETION IF REQUIRED



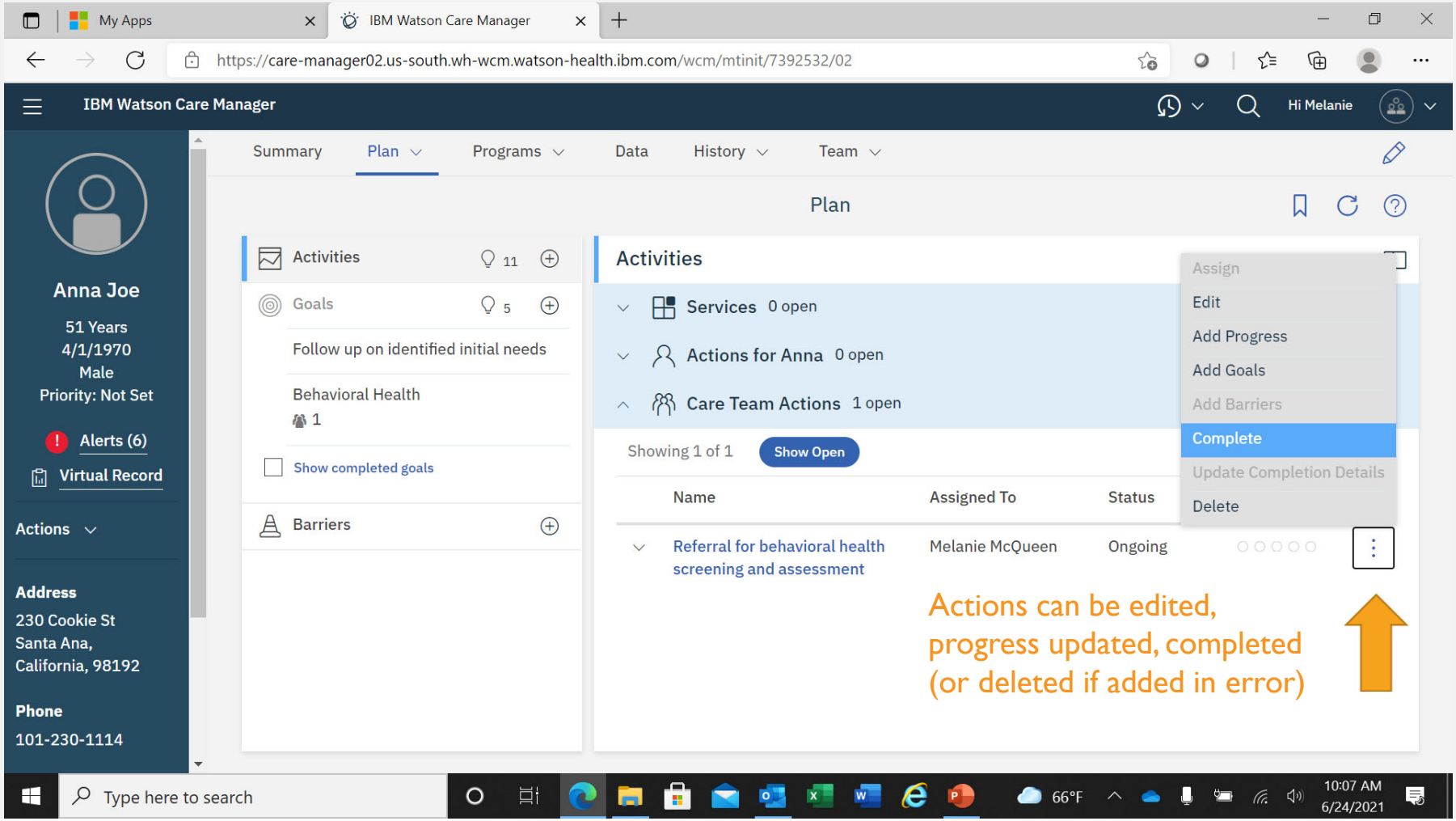
THE ACTION NOW APPEARS ON THE CLIENTS CARE PLAN PAGE



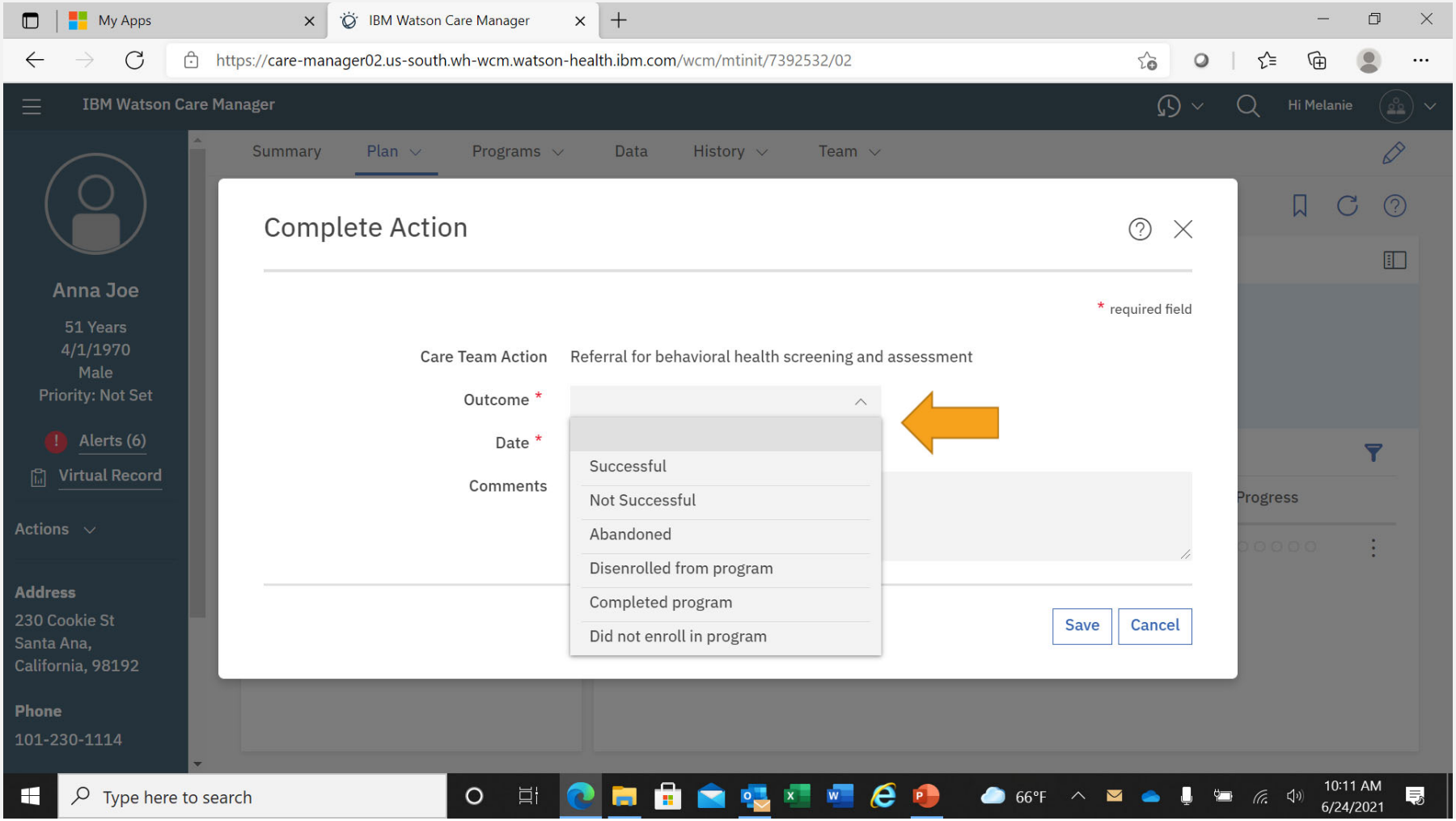
ANY TIMEFRAMES ASSIGNED TO THE ACTION, WILL APPEAR ON THE ASSIGNED CARE TEAM MEMBERS WCM HOME PAGE



FROM THE CLIENTS CARE PLAN PAGE, THE STATUS OF ACTIONS CAN NOW BE UPDATED



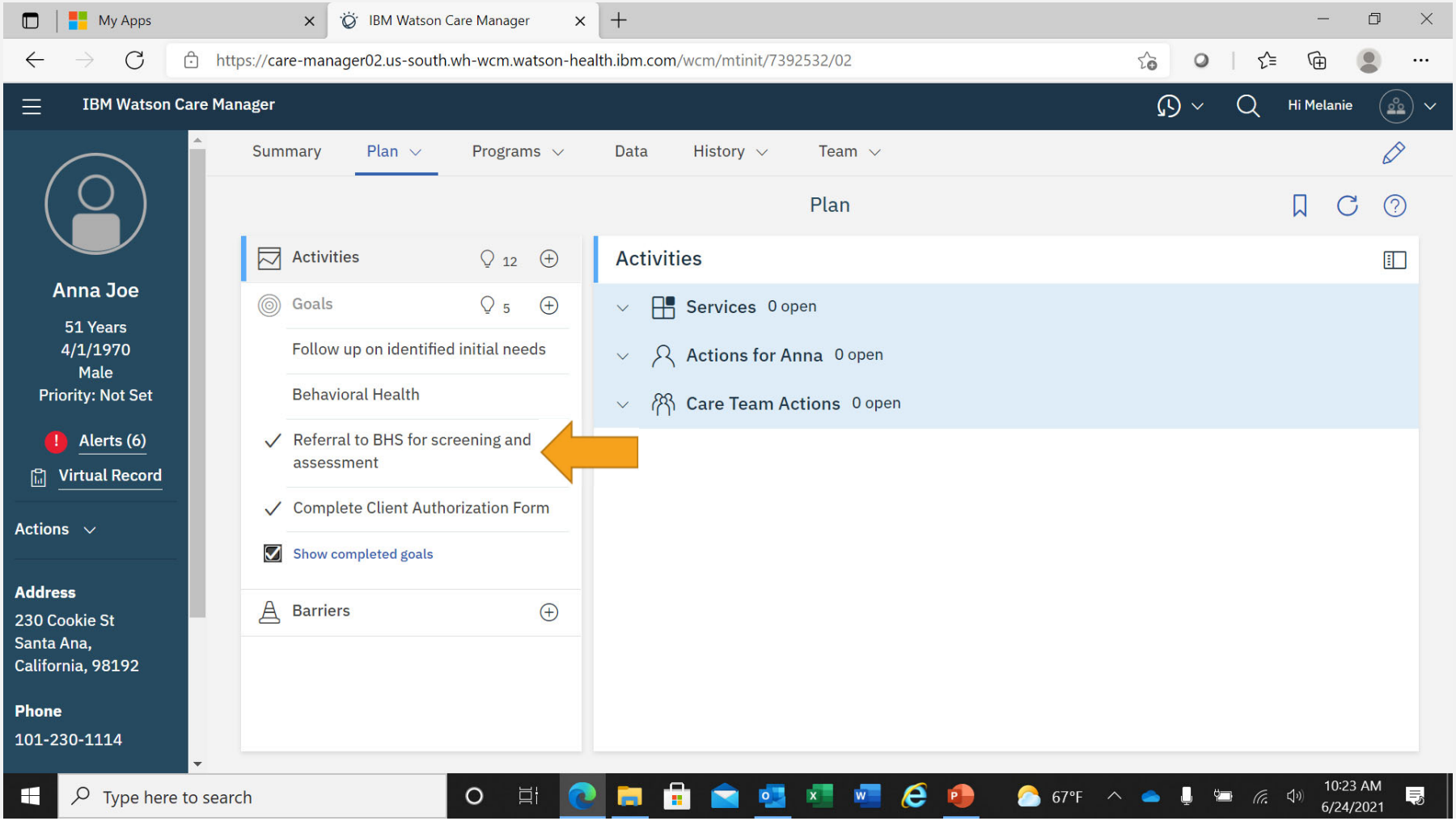
WHEN COMPLETING ACTIONS, PLEASE PROVIDE OUTCOME



A NOTE ON COMPLETING ACTIONS

- Select either **'successful'** or **'not successful'** as default (these measures are used in CPP performance reporting)
- Only use the other categories if the action is no longer relevant or if progress was never even attempted
- Closing out is required for each action (progress updates are optional), before a client is exited from WCM programs and deactivated from CPP

COMPLETED ACTIONS ARE VISIBLE ON THE CLIENTS CARE PLAN PAGE



WHEN ALL CARE PLAN ACTIONS HAVE BEEN CLOSED OUT, AND

THE CLIENT NO LONGER NEEDS VCC / ICC,

AN OUTCOMES FORM CAN BE COMPLETED, AND

THEY CAN BE EXITED FROM THAT PROGRAM…

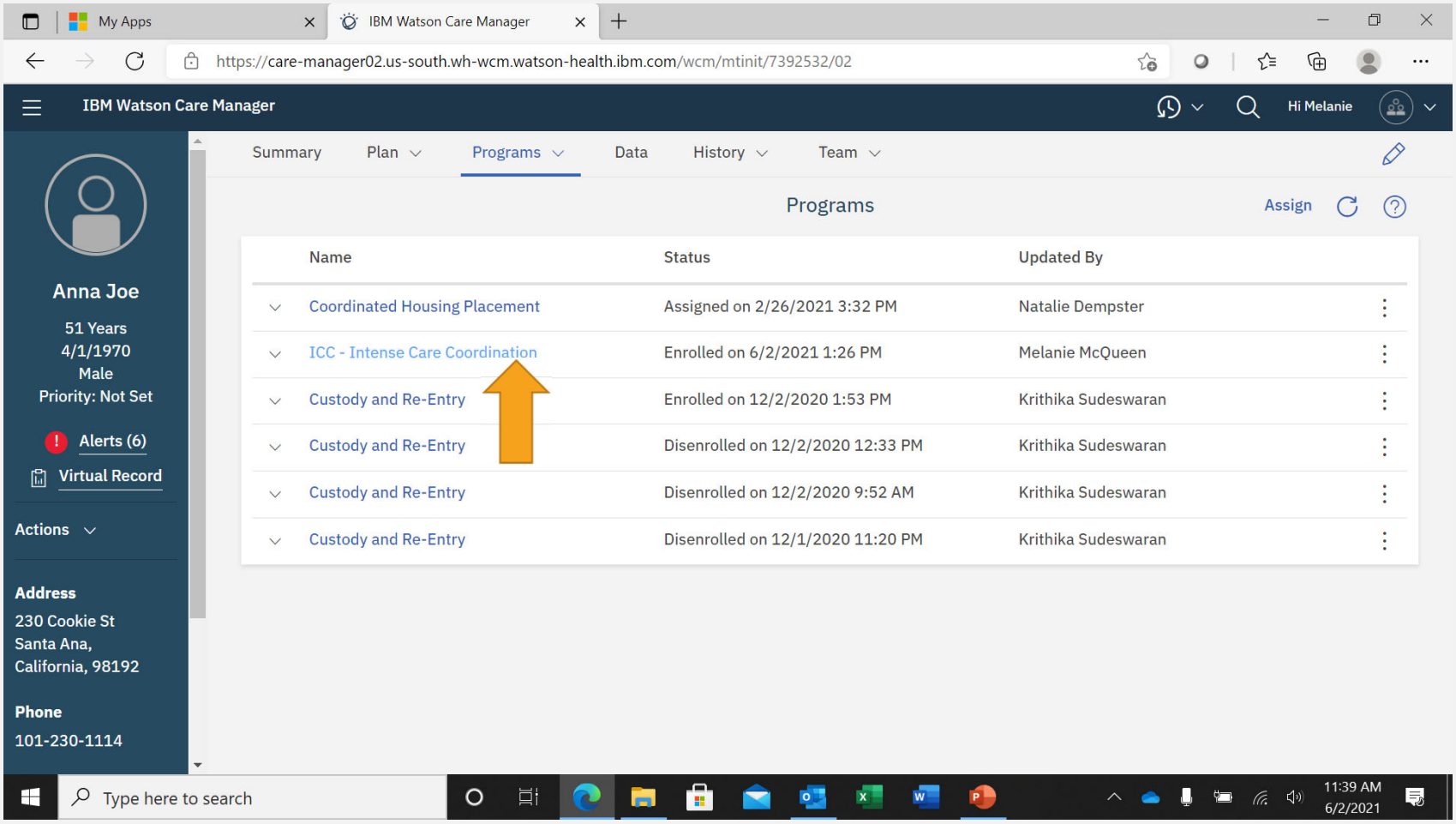
NOTES ON EXITING CLIENTS FROM PROGRAMS

Once a client leaves a program they are enrolled in, they must be exited –

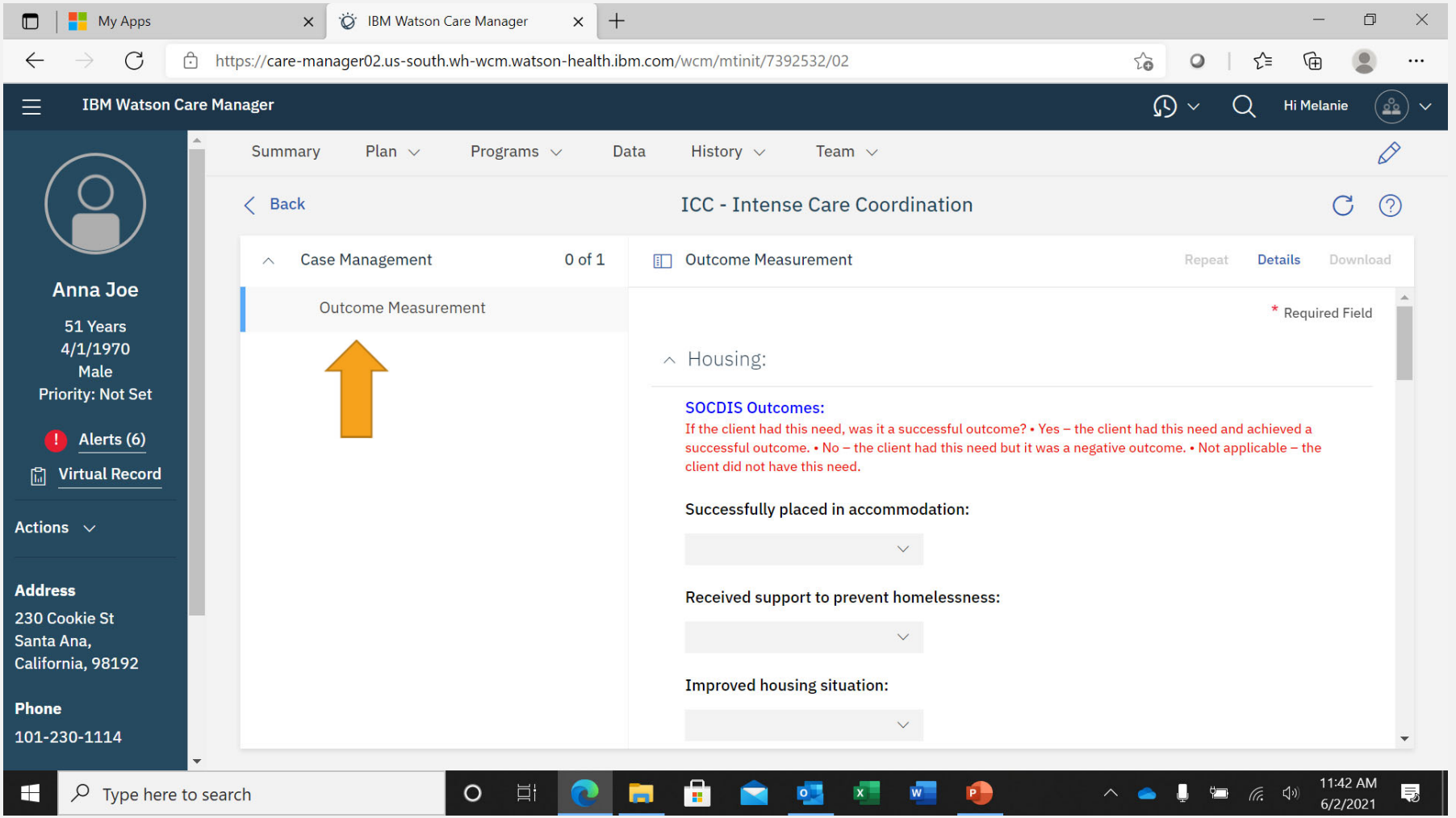
- An **outcomes form** must be completed first for the VCC or ICC programs
  - this measures clients' outcomes and overall CPP impact
- **Program exit** captures if **successful (completed)** or **unsuccessful (disenrolled)**
  - These successful and unsuccessful program exits are monitored by the Care Plus Program to determine **effectiveness**

*All program **actions** in the clients **care plan** must be completed / closed out before exiting the program*

TO ACCESS THE OUTCOMES FORM, SELECT THE RELEVANT ICC OR VCC PROGRAM FROM THE 'PROGRAMS' TAB



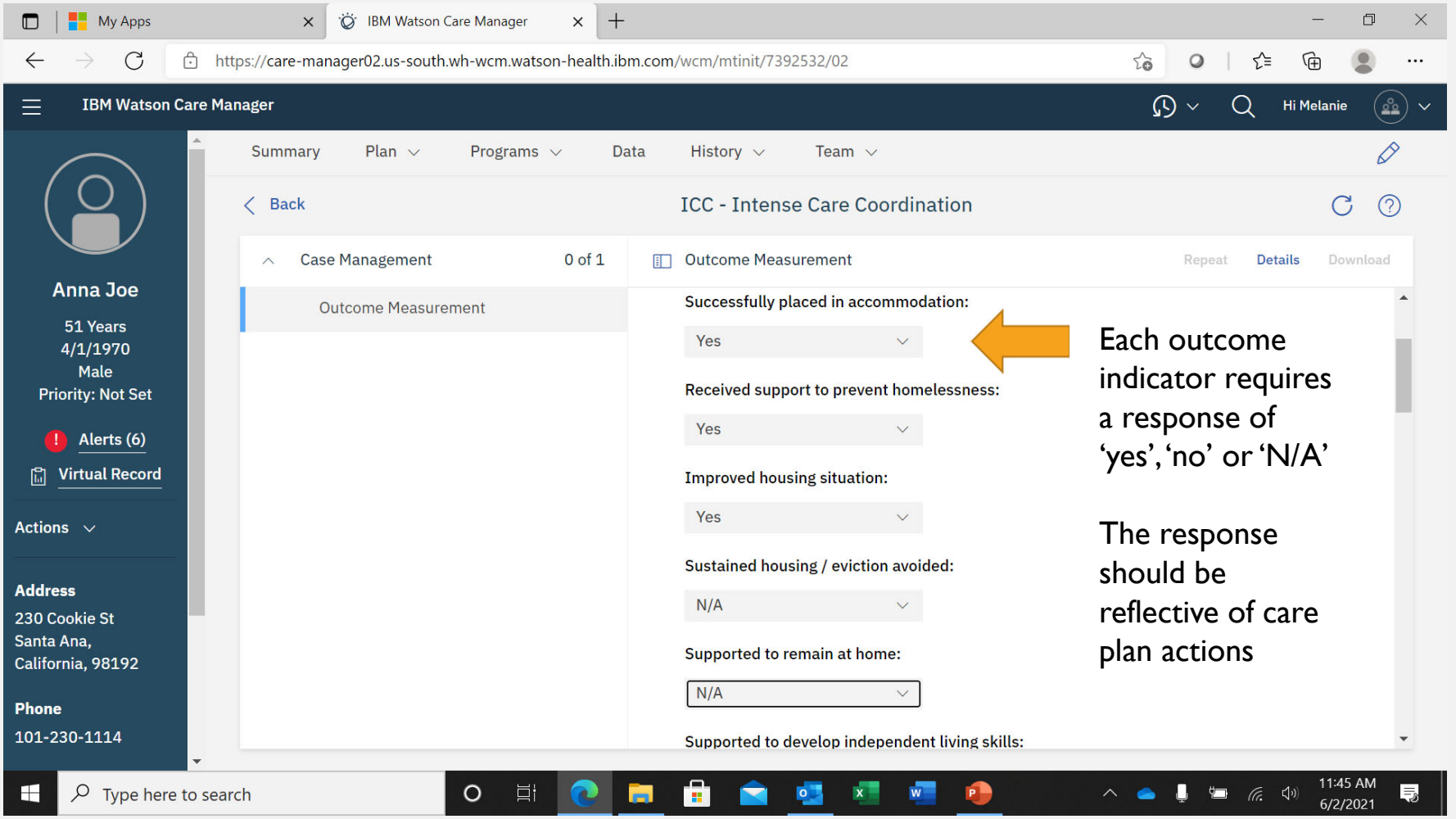
SELECT ‘OUTCOME MEASUREMENT’ UNDER CASE MANAGEMENT



NOTES ON COMPLETING THE OUTCOMES FORM

- The outcomes form is structured under the goal headings:
  - Behavioral health
  - Benefits and Supportive services
  - Correctional health
  - Healthcare
  - Housing
  - Probation
- There are 23 outcome indicators altogether
- Please answer in your professional judgement:
  - 'Yes' – if the client had this need and it was a successful outcome
  - 'No' – if the client had this need but it was a negative outcome
  - 'Not applicable' – the client did not have this need

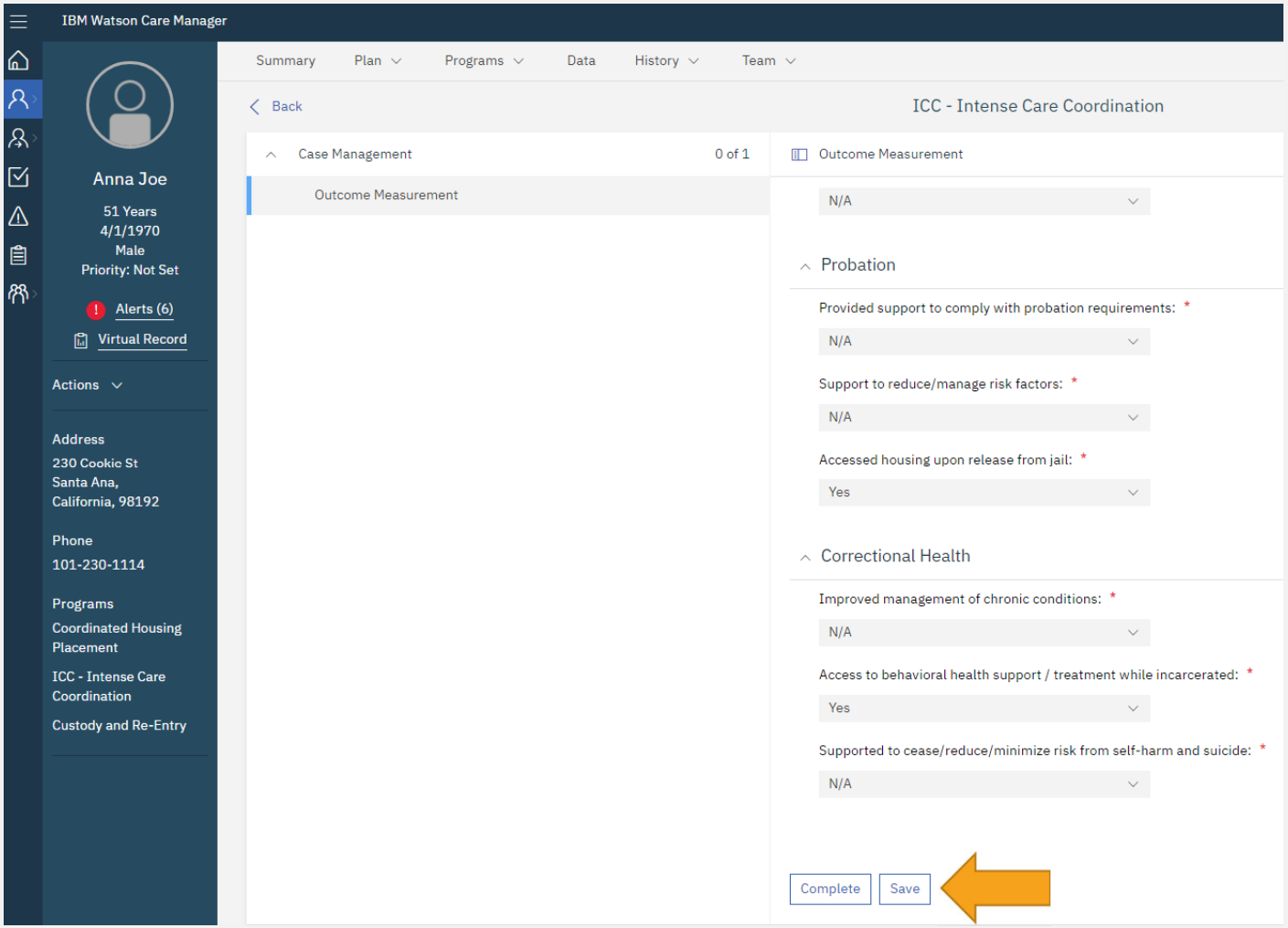
WORK THROUGH THE OUTCOMES FORM



Each outcome indicator requires a response of 'yes', 'no' or 'N/A'

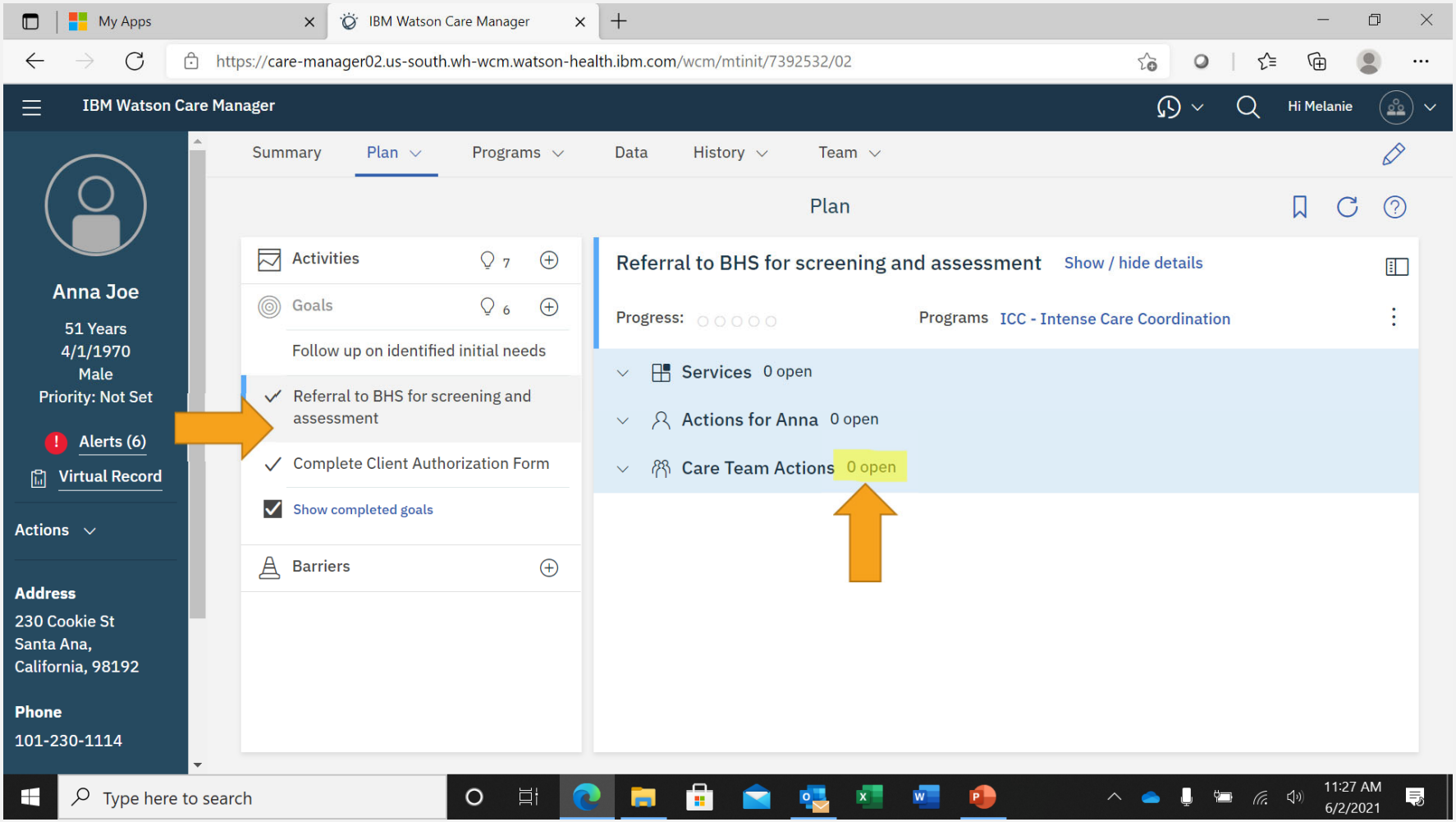
The response should be reflective of care plan actions

SAVE AND COMPLETE THE OUTCOMES FORM

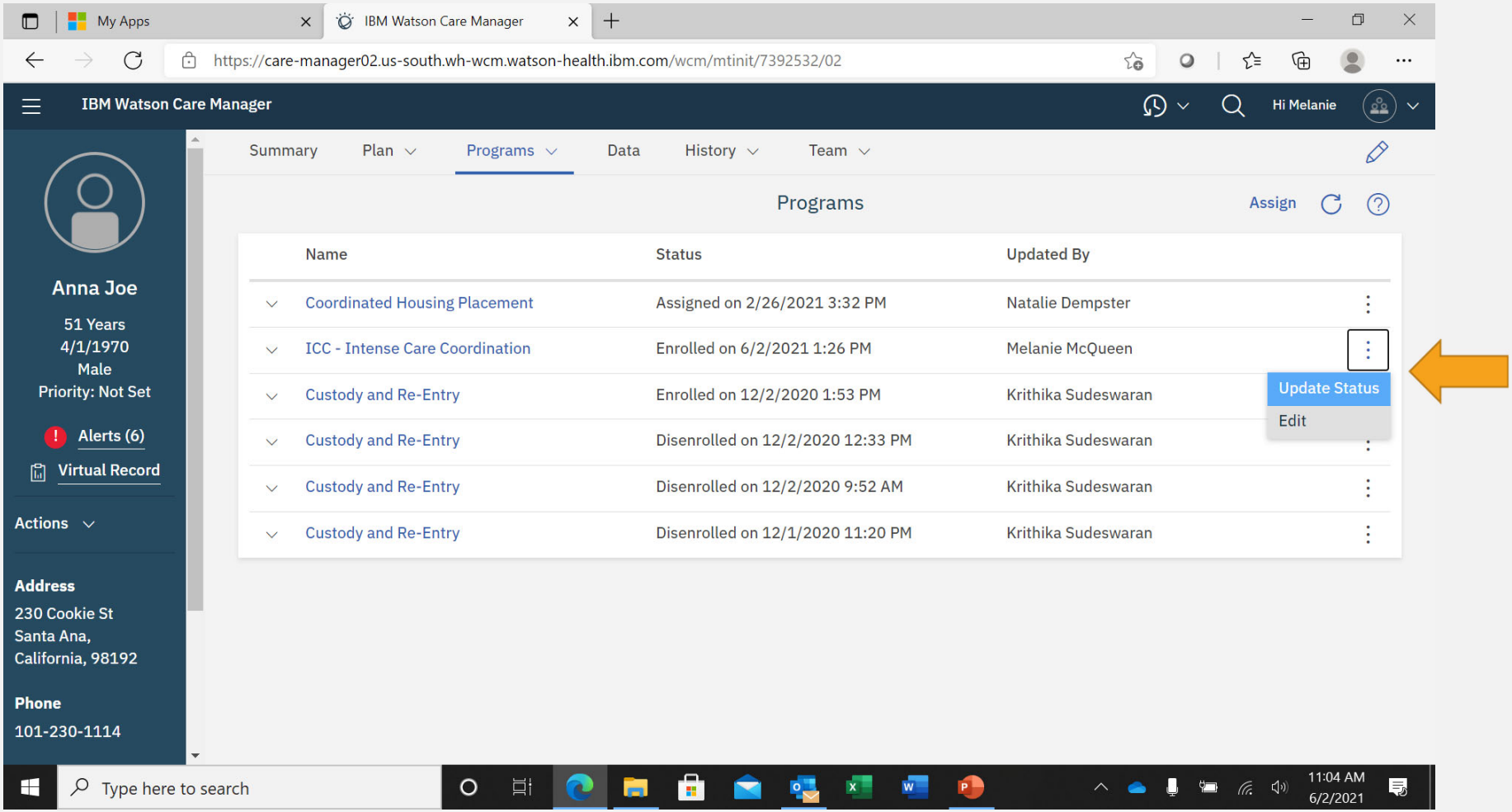


NEXT EXIT THE CLIENT FROM THE PROGRAM

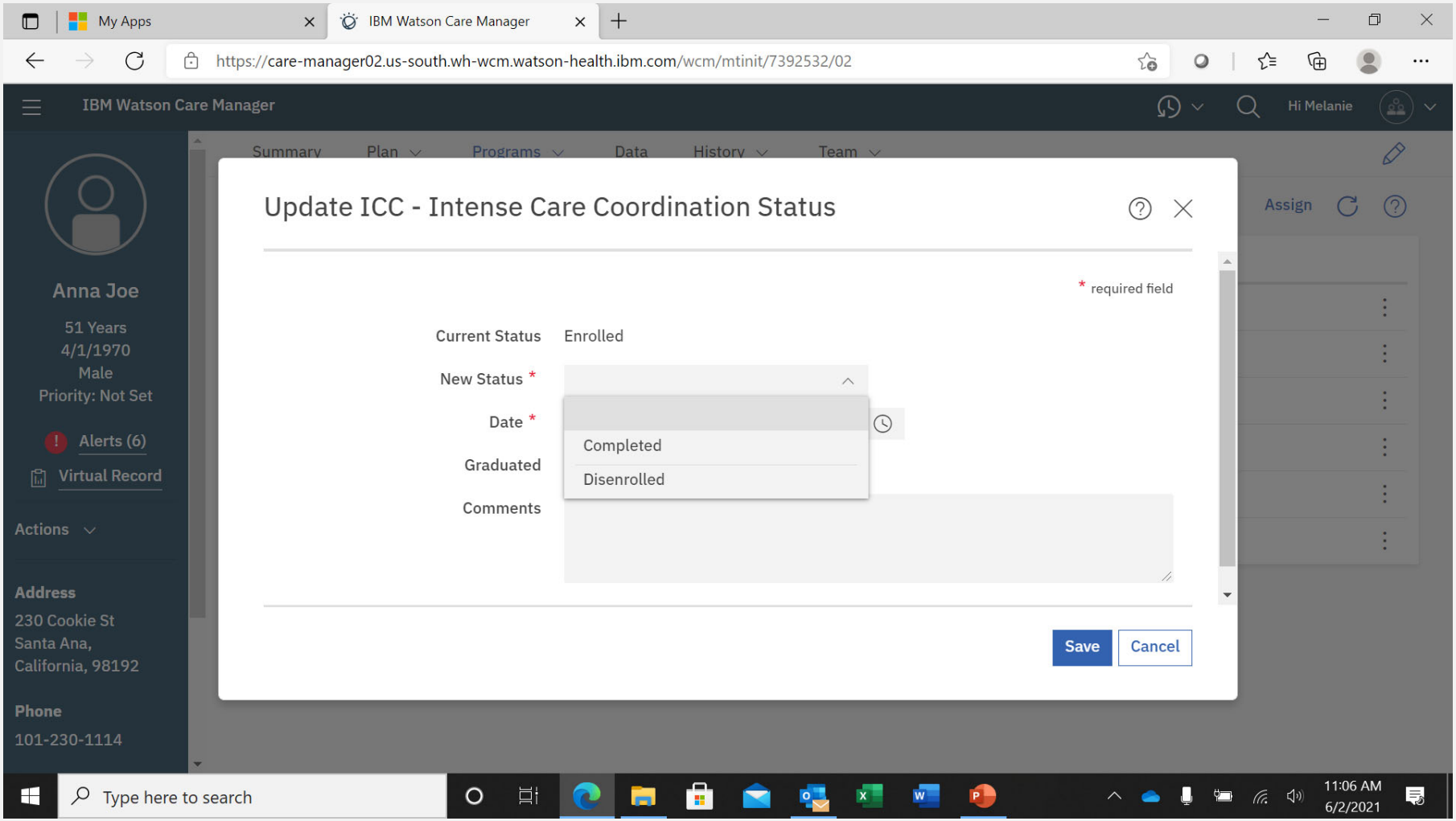
REMEMBER! ENSURE ALL ACTIONS ARE CLOSED OUT IN THE CLIENTS CARE PLAN FIRST



WHEN THE CLIENT EXITS THE PROGRAM, CLICK ‘UPDATE STATUS’



SELECT ‘COMPLETED’ IF SUCCESSFUL OR ‘DISENROLLED’ IF UNSUCCESSFUL



CLOSING OUT CLIENT FROM CARE PLUS PROGRAM

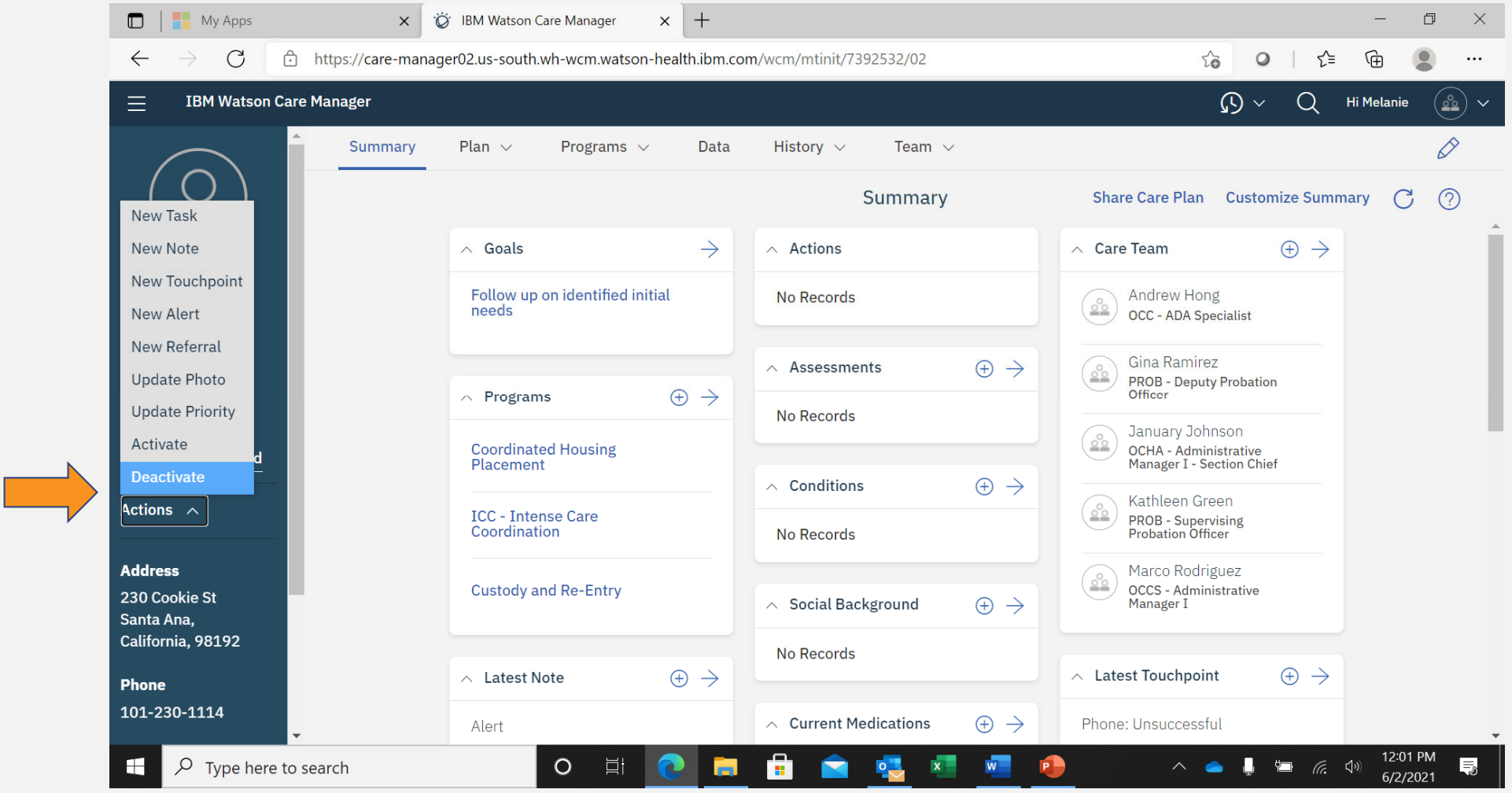
After:

- ✓ An outcomes form has been completed,
- ✓ The client has been exited from all WCM Programs, and
- ✓ The client no longer needs care coordination under the Care Plus Program,

They can be closed out from the Care Plus Program by **deactivating** them

(the client can always be reactivated if they return to CPP)

TO CLOSE OUT THE CLIENT FROM CPP, CLICK 'DEACTIVATE' FROM ACTIONS MENU FROM THE CLIENT'S PAGE



THE CLIENT IS NO LONGER ACTIVE IN THE CARE PLUS PROGRAM

(CAN BE REACTIVATED IF THEY RETURN TO CPP)

CarePlus

PROGRAM

ANY QUESTIONS?

Thank you!