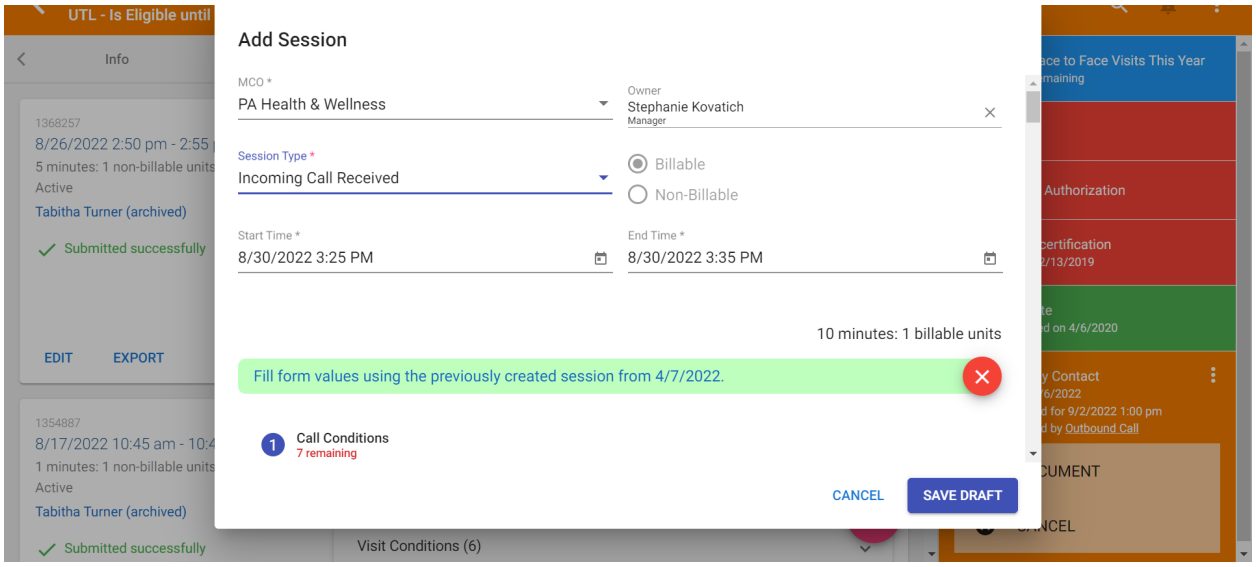
Incoming Call Received

Used to document incoming unscheduled calls. You should discuss the following and document details of the call appropriately.

Note: This session cannot be submitted if the participant has Inactive Eligibility.
Document the call as “Office Note”

Session Requires:

- Appropriate answers to all required fields



Process:

1) When a call is received by the Service Coordinator directly from the participant or their Authorized representative
2) Service Coordinator must document the specifics of the call and who they spoke with in the Function Portal Session

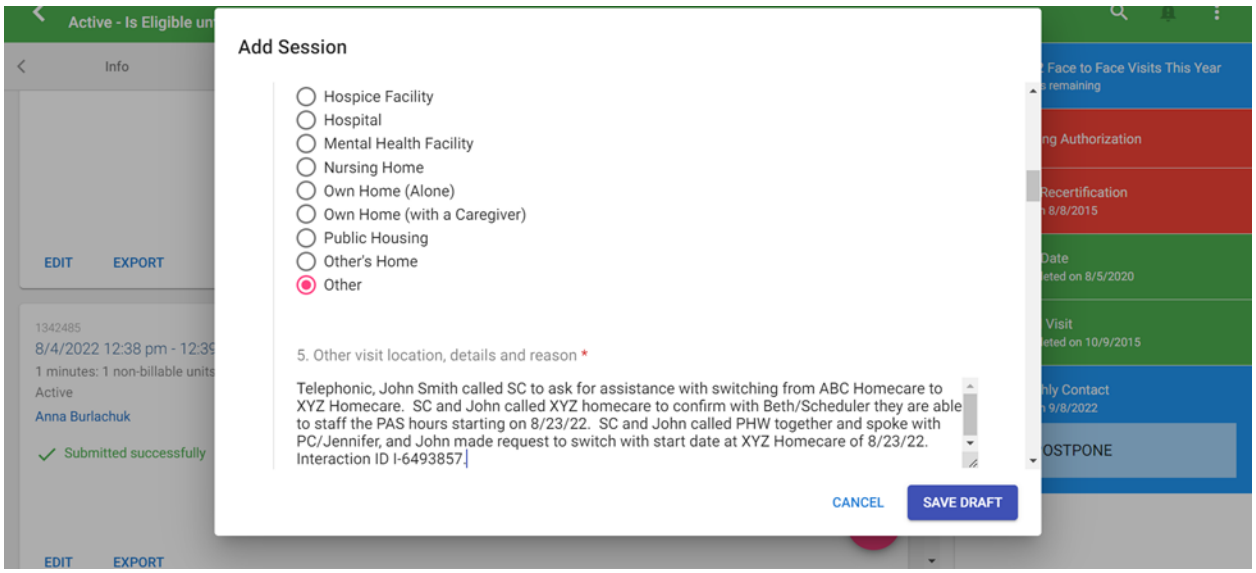
Documentation:

1) Call Conditions
   a) **Visit Type** - How are you contacting the participant?
      - Answer should always be Telephone

   b) **Was the Legal Representative invited to participate?** - Did you or the participant try to involve the participant’s Legally Authorized Representative, if there is one at all?
      - Answer is based on if your participant has a rep and invited them or not

- Based on you answer you may need to answer the following:
  Did the Legal Representative participate in the contact?
  Did the member request that the legal representative not participate?

c) **Where did the visit take place?** - is asking for "where did the *contact* take place?
   - Answer should always be Other (as this is a telephone call to the participant)
     Then in "*Other visit location, details and reason"* you should put Telephonic and then document the details of the call, including names of who you spoke with and Interaction ID's if talking to PHW.



d) **Where does the participant currently reside?** - Coordinator should be confirming the client's address and type of residence, then choose the appropriate answer.
   - If the answer was "Home (with a caregiver)" then the coordinator needs the following information about the caregiver.
     Caregiver name
     Caregiver relationship
     Does the caregiver live with member?
     Does the caregiver provide natural support? - meaning does the caregiver provide informal/unpaid support?
     Is the caregiver paid?- meaning does the caregiver provide formal/paid support?
   - If the answer was "Other" then the coordinator needs to state what the *Other residential location* is

- If the answer was: “AFCH, ALF, Hospice, or Nursing Home” the the caregiver must state what the *Residential location facility name*

e) **Information provided by**** - Meaning who did the coordinator speak with during the call. This is also how you may document the call.
- If information was provided by *Enrollee, Authorized Representative,* or *both then you make the appropriate selection*
- If information was provided by *Other* or *Enrollee and Other*, the name of the person/people you spoke with should be documented in **Information provided by other**

f) ***Has the participant expressed the desire to move from an institutional setting to the community?*** - participants have to be currently residing in a Nursing Facility for the answer to be yes.
- Answer is most likely - Participant has NOT expressed desire...
- If the answer was “Participant has expressed desire …” the coordinator needs to state the current transition status

g) ***Did the participant’s demographics change?*** - Has any of the information about the participant changed?
- If there was a change, then the coordinator must state what the changes are.

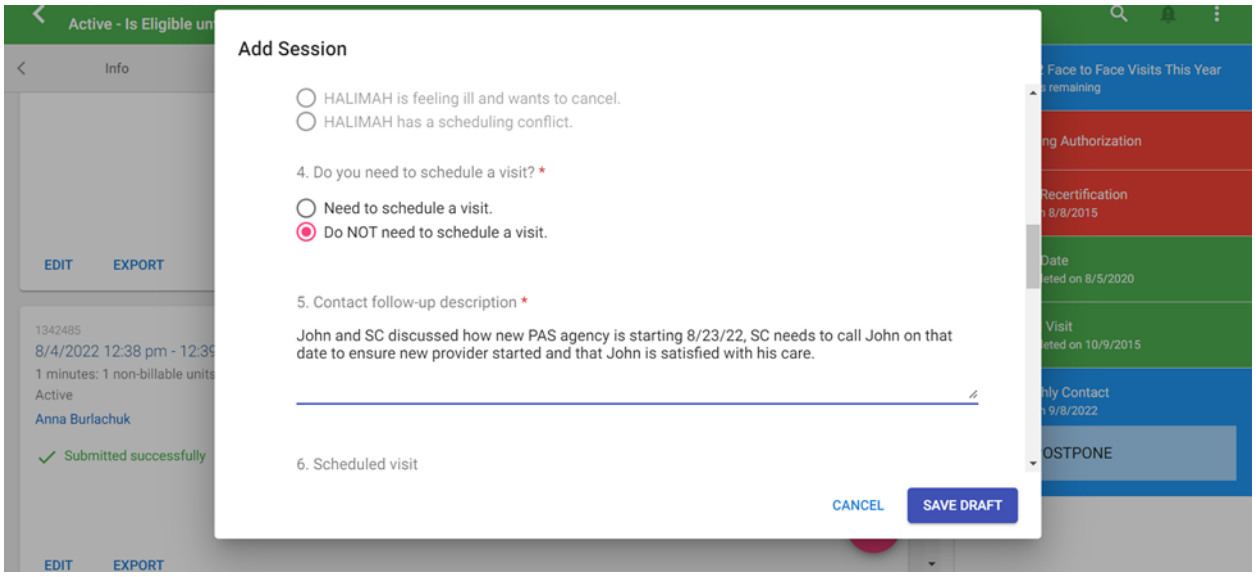
2) Resolution

a) Is follow-up required for the contact?
- A follow up is required- Answer should always be selected if there is any additional work that needs to be done to resolve the call (ie. if the participant asks for a list of PAS providers in their area and you were unable to provide it to them during the call OR if they tell you the new PAS agency starts tomorrow and you were calling to find out if they are receiving the services yet and you then need to call again the next day).
- A follow up is NOT required- Answer would be selected if you resolved all issues during the call (ie. you were able to give the participant a list of PAS providers in their area during the call and the participant had no other questions/issues).

b) Is there a scheduled visit that needs to be canceled?
- Yes- If the participant called you to cancel a visit that was previously scheduled
  (1) If the participant wants to cancel a visit then you will select the reason the visit is being canceled.
- No- If the participant does NOT have a visit scheduled OR has a visit scheduled and does not wish to cancel it at this time (ie. ptp called you to ask you to bring a list of PAS providers to the visit)

c) Do you need to schedule a visit?
- If the participant’s visit is already scheduled, or they are NOT due for a visit, then the coordinator should select *Do NOT need to schedule a visit*. This will prompt **Contact follow-up description**

Contact follow-up description - detail what follow up you will be doing with the participant.



- If the participant is due for a visit and you schedule it with them in this call then you need to select *Need to schedule a visit* and this will prompt follow-up questions on the scheduled visit.

  Scheduled Visit - select the type of visit that was scheduled

  (a) If the type of visit scheduled is not listed, the coordinator should choose a visit, put in the date and time it is scheduled, but do NOT answer the compliance question. **SAVE** the session **DRAFT** and notify the AVP so that they can put in the correct visit type.

  Visit scheduled for - date and time the visit is scheduled for

  Is the scheduled visit after the compliance due date? - Is the date the visit is scheduled for before the due date? The due date for the visit is either in the alerts on the right hand side of the screen (Annual and NPO) or is within 14 days of a discharge or request for a visit from the Participant (Change Event).

  (b) If the visit is scheduled after the compliance date, this will prompt the last 2 questions to generate

  (i) **Who were you trying to contact?** - Who did you contact/schedule the visit with?

  (ii) **Reason for contact** - the type of visit that was scheduled.