

7 Day Follow Up

SCS contacts the ptp to see if the services started (please note that even if the ptp has not yet received any calls from their prospective providers by the 7 day follow up - please let them know that it is normal and the process usually takes up to 14 days to set everything up, there is no need to worry)

Outcome:

- All services started- No 14 day follow up needed
- Some of the services started (14 day follow up needed)
- None of the services started(14 day follow up needed). Reasons why services did not start:
 - Authorizations pending
 - Onboarding in progress (for PAS)
 - Installations scheduled but not yet completed (PERS, Telecare)
 - Provider chosen at NPO unable to staff the case (usually PAS)
 - Find a new provider
 - Broadcasting form (in more complicated cases)
 - Providers have not called the ptp but auths are in place (some providers have a longer intake process, so it will take longer for them to contact the ptp , but the call should still happen within 14 day period)
 - Authorizations built incorrectly (wrong provider , for example)
 - Email AM for auths to be corrected
 - PTP reconsidered a service, requesting it terminated (ADC and Telecare- most common cases)
 - SC will talk to the ptp, explain the benefit of the service, offer a provider change (common with HDM)
 - PTP insists on termination-proceed with an SRT
 - PTP agrees to a provider change- SC will call in the provider change to PHW
 - PTP lost their place of home and are currently homeless
 - Report to AM (services are unable to start as the ptp is currently homeless)
 - Possibly assist with finding a place to live (?)
 - PTP is currently hospitalized (services should start as soon as the ptp gets discharged)
 - Follow up with an Incident Report and COC if needed after discharge.
 - SC will make sure services are ready to start as soon as the ptp gets discharged;
 - SC will contact the providers to make sure they have auths and are ready to start the service once the ptp gets discharged.
 - PTP/AR refuses services (see details under "Other")

- PTP passed away/ switched MCOs (task for the SC to complete 1768 (in case of death) and complete Termination process)
 - In case of an MCO change, or loss of eligibility- you will not be able to document either 7 or 14 day follow up, office note only- no follow up to be completed
- During the follow up SCS may also discover that:
 - PTP moved to a new address (complete 1768)
 - PTP had a hospitalization (after NPO) / ER visit or is currently hospitalized (task for the SC to follow up with a Incident Reports and COC)

Unable to reach for 7 day follow up:

- SCS documents 3 unsuccessful attempts to complete a 7 day follow up in case a ptp is UTL.
 - 1st attempt should be completed on the day the Follow up is due. Example: if NPO was completed on 6/1, then your 7 day follow up or attempt #1 to complete one should be documented on 6/8
 - Make sure to choose 7/14 day follow up as the reason for the outreach; also please make sure you called all of the numbers, EC/ AR on file, and the providers as well)

14 Day Follow Up

By the 14 day follow up ideally all of the services will have started. If not, it is your job to resolve any issues and ensure the services start as soon as possible.

Outcome

- All services started (no further actions required)
- Some services already started, but the rest of the services are scheduled to start in near future
 - SC will call back at a later date to confirm the services started
- Some services started but the providers for the other services have not still been in contact with the ptp to discuss the start date or the service itself; **or** no services started at all
 - follow up with the providers to see what's causing the delay in services immediately.
- The delay in services may be caused by the following:
 - Auths created for incorrect provider
 - Email the AM to have the auths corrected.

- Continue following up with the provider to make sure they receive the corrected auth and are able to start the services
- PAS service- the onboarding process incomplete, services will start as soon as the HHA completes the process
 - SC/ SCS is to monitor the start of the service by following up with either agency or the ptp to make sure no other issues come up and the services start.
- Installations scheduled but not yet completed (PERS, Telecare)
- Provider chosen at NPO unable to staff the case (usually PAS)
 - Find a new provider
 - Broadcasting form (in more complicated cases)
- The provider is unable to get in contact with the ptp (More common examples- PERS, Telecare provider; usually when the ptp reports that the provider has not been in contact to discuss the service)
 - SCS will contact the provider/s and provide any additional phone numbers to the provider or complete a 3 way call to connect the ptp and the provider ensure services start as soon as possible.
- Recent provider change- authorizations pending
 - Follow up with the new provider to confirm they received auths and are able to start the services.
- No authorization of file (please note that a lot of times even if we see auths on the Auths report- the provider may not see the auths in the HHAExchange due to a system error)
 - SCS will escalate with the AM to create or retrigger the auths.
 - The email subject line should state “ *14 Day Follow Up/ Escalation*”, the email will say the following: “*The PAS and PERS providers for Jane Smith (1/1/1931) do not have authorizations for the PTP and are unable to start the services. Please escalate*”
 - And then when the auths are either created or retriggered- work with the provider to ensure they start the service as soon as possible.
- PTP reconsidered a service, requesting it terminated (ADC and Telecare- most common cases)
 - SC will talk to the ptp, explain the benefit of the service, offer a provider change (common with HDM)
 - PTP insists on termination-proceed with an SRT
 - PTP agrees to a provider change- SC will call in the provider change to PHW
- PTP lost their place of home and are currently homeless
 - Report to AM (services are unable to start as the ptp is currently homeless)
 - Possibly assist with finding a place to live (?)
- PTP is currently hospitalized (services should start as soon as the ptp gets discharged)

- Follow up with an Incident Report and COC if needed after discharge.
- SC will make sure services are ready to start as soon as the ptp gets discharged;
 - SC will contact the providers to make sure they have auths and are ready to start the service once the ptp gets discharged.
- PTP/AR refuses services (see details under “Other”)

During the follow up SCS may discover that:

- PTP moved to a new address (task for the SC to complete 1768)
- PTP passed away/ switched MCOs (task for the SC to complete 1768 (in case of death) and complete Termination process)
- PTP had a hospitalization(after the NPO)/ ER visit or is currently hospitalized (task for the SC to follow up with an Incident Report and COC)
-

Unable to reach for a 14 day follow up:

- On the day 14 day follow up is due- SCS will attempt to get in contact with the ptp/ AR/ EC/ HHA- on all of the numbers we have on file, if unsuccessful- contact the PAS agency to get any additional/ new contact info and see if the service started. The goal is to speak to the PTP/ AR/ EC. If all attempts unsuccessful:
 - SCS will email the AM stating that the PTP is unable to be reached for the 14 day follow up, and services’ start will be confirmed with the providers.
 - SCS will open a task for the SC to confirm services with the providers and create an Office Note stating:
 - “ *PTP is UTL for a 14 day follow up; Services will be verified with the providers*”
 - or
 - “ *PTP is UTL for 7/14 day follow up; Services will be verified with the providers*”

In cases when the ptp was unable to be reached for both the 7 and 14 day follow ups as well.
- PTP refuses to complete the 14 day follow up:
 - Complete an Unsuccessful Outreach (make sure to check off “ member refusal”)
 - Office note in FP and task for services to be verified with the providers

MCO Transfers:

- NO new services requested

- Office note in FP-“ *PTP is an MCO transfer; no new services requested; no 7/14 day follow up needed*”
- New services requested:
 - SCS will open a task for the SC to monitor the start of the newly requested service/s
 - SCS will add an office note in FP: “ *PTP is an MCO transfer; no 7/ 14 day follow up needed; [new service] will be monitored by the SC [SCS opens a task].*”

Other

1. SCS contacts the **PTP** for 7 or 14 day follow up and the ptp states they rejected PAS (and in some instances all the services) because they got approved for fewer PAS hrs than they had asked for.
2. SCS contacts the **AR/ EC** (usually it would be a family member, not POA) for 7 or 14 day follow up and the AR/ EC states they rejected PAS (and in some instances all the services) because the PTP got approved for fewer hrs than they had asked for.

The difference between the 2 instances is that in the 1st example (when the SC speaks to the PTP) where the PTP themselves made the decision V.S. 2nd case where the decision to reject all of the services is made for the ptp by a family member or another Authorized Representative(but not POA), which may affect the ptp in a negative way-needs to be reported to the AM and possibly APS(each case is different, please discuss with Liz before reporting to APS).

