**Assessments for Mary Poppins**

Shortcuts to specialized assessments

| CHF Part 1 | CHF Part 2 | COPD Part 1 | COPD Part 2 | Diabetes Part 1 |

| Diabetes Part 2 | NP | MMSE | PHQ-9 |

Click **Date** link to view assessment

Use to filter by any field

| Date | Status | Author | Assessment Type |
|------|--------|--------|-----------------|
| 02/11/2022 6:39:26 AM | Complete | | Comprehensive 3.0 |
| 01/27/2022 3:11:09 PM | Pending | | Functional |

Click any header to re-sort the list

Some assessments built into CaseTrakker are auto-generated and assigned based on time frames or other triggering events. For regular **Comprehensive 3.0** assessments (scheduled every 3 or 6 months), Care Managers should be reviewing assignments to confirm that the next assessment is assigned for the proper time frame and to the appropriate PCT member based on the member's complexity.

You can click on any column header to change the sort of the list: by default the most recent items are listed first. Clicking the filter icon (▼) will open the **Filter** feature. The list of Assessments will filter as you type in the text field.

**Filter** [                    ] ▼

If you close the Filter feature by clicking ▼, the list of Assessments will not reset unless you have cleared the text field.

Clicking on the **Date** hyperlink will refresh this screen to open the Assessment. The Date and Time stamp for the Assessment reflects when it was opened by the Care Management colleague to complete.

**MDS Assessments**

| MDS Assessment |

Click **Date** link to view assessment
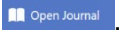
Use to filter by any field

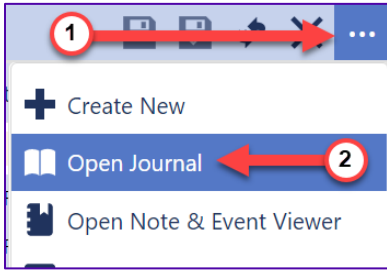| Assessment Date | Status | Author | Assessment Type | Facility |
|-----------------|--------|--------|-----------------|----------|
| 07/17/2020 | Complet | | | NOTRE DAME LONG TERM CARE CTR |

Click any header to re-sort the list (alphabetically or by date)

Members living in the community who are not Community Well (Level 1 or 2) are required to have an **MDS-HC** completed by a nurse annually, which is submitted to MassHealth to determine the member's Rate Cell. The MDS-HC is built and completed in CaseTrakker by an RNCM, then submitted to MassHealth's Virtual Gateway by an MDS Coordinator.

Members living in an institutional setting are required to have an **MDS 3.0** completed by the facility periodically, which is also submitted to MassHealth. SCO Care Management will receive copies of the MDS 3.0, which is uploaded to the Assessment Summary screen as an attachment.

**Assessment Summary** Assessment Summary
CaseTrakker v.6 Quick Reference

Point32Health

Harvard Pilgrim
Health Care

TUFTS
Health Plan

**To find the next scheduled Comprehensive Assessment from the member file:**
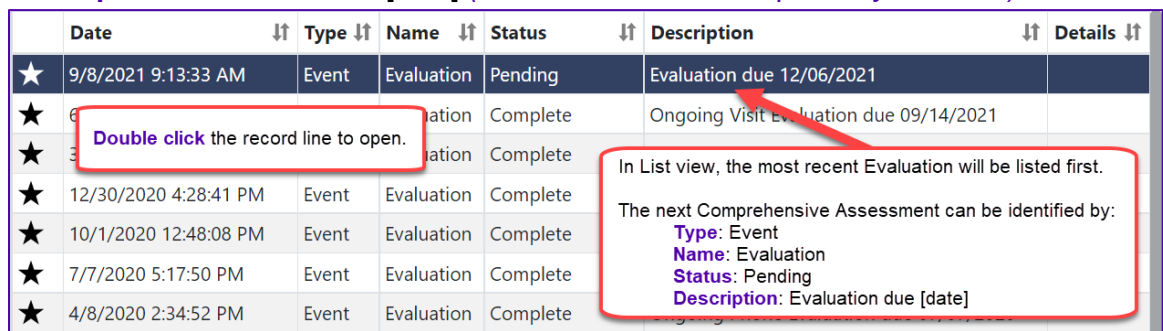
1. From ⋯ , click 📖 Open Journal .



2. By default, the Case Journal will be in **List** view, which will list all activity with the most recent first. Type **evaluation** in the filter and the list will filter as you type.
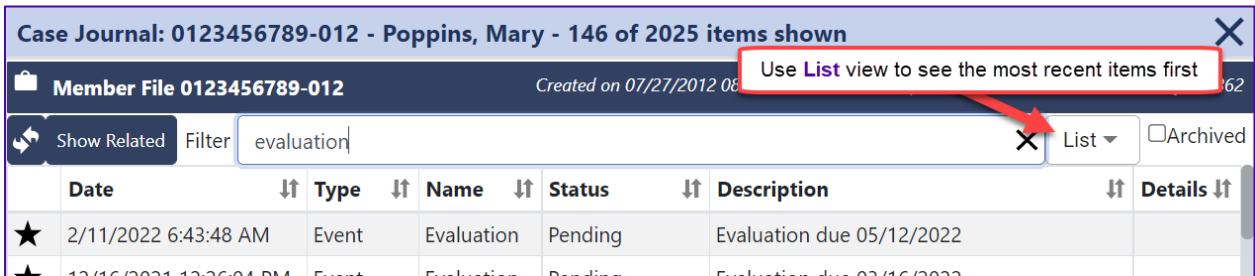


3. The next Comprehensive Assessment should be listed first, as List view puts the most recent activity first. **Double click** the record line to open it. You can confirm that the record is for the next Comprehensive Assessment by looking at the following fields:

   a. **Type**: Event

   b. **Name**: Evaluation

   c. **Status**: Pending

   d. **Description**: Evaluation due [date] *(This is the due date required by EOHHS.)*

# Assessment Summary
## CaseTrakker v.6 Quick Reference

Assessment Summary

Point32Health

Harvard Pilgrim Health Care

TUFTS Health Plan

Double click the record line to view these details of the evaluation:

**Evaluation-**

**Evaluation Task for:**

**Primary Phone:**      **Responsible Phone:**

**DOB:**

**Status** ⟳
Complete
**Date Saved in Final Status**
7/19/2021

*** Note: An Evaluation is the Task for a Comprehensive Assessment ***

**Assigned To**      **Assigned Date** ⟳      **Created Date**

4/23/2021      4/23/2021 2:13:14 PM

> Hover your cursor over this icon to see history of any changes

> **Name** and **Phone Number** of individual who completed evaluation

**Click here to document call attempts**

| **Date** | **Activity** | **Outcome** | **Notes** |
| --- | --- | --- | --- |
| 07/15/2021 4:10:03 PM | Phone Call: Outbound - member/caregiver | Successful | RNCM spoke with member's gra... scheduled home visit on 07/19/2... Symptoms Pre-Screen for In-Pers... granddaughter Fiona due to me... negative screening, home visit confirmed with member for 07/19/21 at 10 AM. |

> **Created Date** should match the date the last evaluation was completed, as that triggers CaseTrakker to create the next Eval Task.
>
> If the Eval Task was reassigned, this date may be different from the **Assigned Date**.

> All **Call Attempts** are documented in the Eval Task, whether successful or not

*** The following fields refer to the next Comprehensive Assessment ***

**Evaluation Due** ⟳
This is the Comp Assessment Due Date
7/22/2021

> Details of the assessment visit, including whether it was face-to-face (**Visit**) or by telephone (**Phone**).
>
> If this is a **Virtual Visit** using a video conference, select **Phone** and include details in the **Notes** field below.

**Evaluation Type**
Ongoing

**Evaluation Method**
Visit

**Evaluation Scheduled Date/Time**
7/19/2021   10:00 AM

**Notes**

**Assessment Taken Date**
7/19/2021

> These dates are <u>current</u> for this member when the record is accessed, <u>not</u> reflecting day counts for when the assessment was actually completed.

| **Days Since Last Comprehensive 3.0:** | **Days Since Last Comprehensive 2.0:** | **Days Since Last MDS-HC:** |
| --- | --- | --- |
| 260 | None Taken | 260 |