

Care Team for Mary Poppins

Click **Date Stamp** to view Care Team member details

Use to filter by any field

Date Entered	Involvement	First Name	Last Name	Effective	Term	Comments
05/24/2019	Member			3/13/2019	1/1/2050	Member is capable of making health care decisions
05/24/2019	Care Manager			3/13/2019	1/1/2050	

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

The **Care Team** screen is used to record who is assisting with the member's care and the role that they are playing. Some of these roles are also listed on the **Member File** screen, however, that does not show historical or detailed data at a glance.

- ✓ **Who** should be included?
  - At a minimum, roles highlighted on the next page should be added for all community-based members, and as applicable for institutional members
- ✓ **What** should be documented?
  - In the **Comments** field: Include relationship to member (if not clear in **Involvement**); Problem(s) this Care Team member is addressing; When adding a **Term Date**, indicate why Care Team member is ceasing involvement
- ✓ **When** should someone be **added** to the Care Team?
  - If they are a regular contributor to the PCT
  - If they are an RN Supervisor overseeing the member's Plan Of Care (POC)
  - If they are providing care to the member (ex. Specialist, HHA, PCA, etc.)
  - If they have been assigned follow up to the member's POC
  - If they have been identified by the member as someone important to their care
- ✓ **When** should someone be **removed** from the Care Team?
  - If their position on the PCT is being assigned to another employee
  - If the member is re-leveled, so there is an RNCM vs. an RN Supervisor overseeing the member's POC
  - If they are no longer providing care to the member
    - Document whether member Goals were met or if there was a clinical decision to cease care
  - If they have completed their follow up to the member's POC
    - Document whether member Goals were met or if there was a clinical decision to cease intervention
  - If the member requests that they be removed from their Care Team
    - Discuss with the member their concerns and offer alternatives if necessary

## Involvement – Roles loaded into CaseTrakker

- Appeals and Grievances Support
- Behavioral Health
- Care Coordinator
- Care Manager
- CM Support Staff
- Community Health Worker
- Community Partner/Resource (*Include details in **Comments** field*)
- CSR (*Customer Service Representative*)
- Delegated/Contract Vendors (*Include details in **Comments** field*)
- Dementia Care Consultant
- Disease Manager
- DM (*Disease Management*) Support Staff
- External Case Manager
- Family Member
- Friend/Neighbor
- GSSC (*Geriatric Support Services Coordinator*)
- Guardian (*Include location of guardianship documentation in **Comments** field*)
- Health Educator
- Healthcare Proxy (*Include location of HCP documentation in **Comments** field*)
- Home Modification
- Medical Director
- Member
- Nurse Practitioner
- Nutritionist
- Occupational Therapist
- PCP (*Primary Care Provider*)
- Personal Care Assistant
- Pharmacist
- Physical Therapist
- POA (*Power of Attorney; Include location of POA documentation in **Comments** field*)
- Provider
- Provider Relations
- Quality Staff
- Representative
- RN Supervisor
- SCO Clinical Consultant
- Secondary Case Manager
- Significant Other
- Social Worker
- Specialist (*Include details in **Comments** field*)
- Speech Therapist
- Spouse
- Transition Coordinator
- UM (*Utilization Management*) Staff