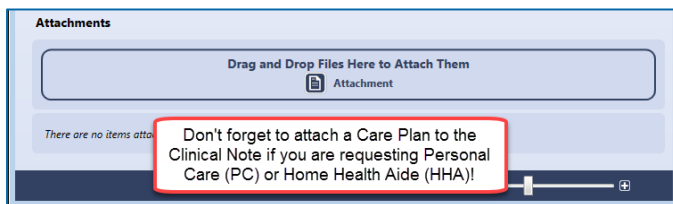



When Care Managers (CMs) determine that SCO members would benefit from Home and Community Based Services (HCBS), they will create Outpatient Event (OPE) requests for the SCO Admin Team and the member's Geriatric Support Services Coordinator (GSSC) to authorize and initiate these services.

1. The CM will document their visit with an **Activity Log** (Activity Type: Clinical Note) following documentation guidelines. The Clinical Note will include a brief description of HCBS being requested, along with the Problem(s) the services are there to remedy/support.



**DON'T FORGET!** If Personal Care (PC), Supportive Home Care Aide (SHCA) or Home Health Aide (HHA) are requested, the CM should complete and attach a Care Plan for the ASAP to the bottom of the Activity Log.

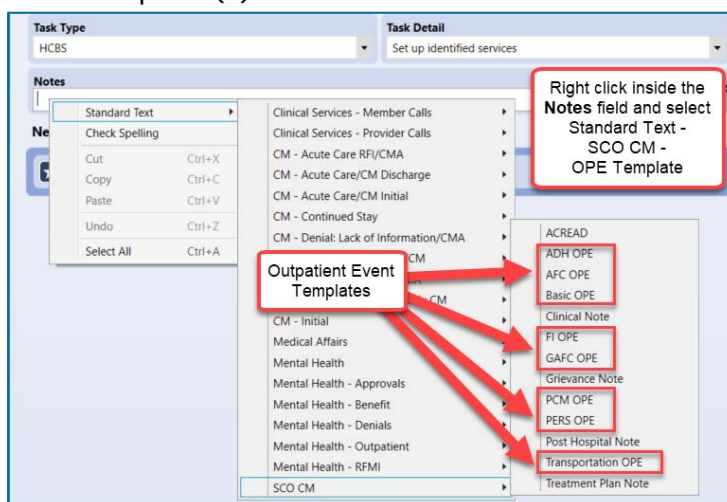


2. From the Clinical Note, the CM will **Task** the **SCO CM Admin Group** (to authorize services) and **the member's GSSC** (to set up and document services) using the  on the Clinical Note. The CM will add an OPE Template for each HCBS being requested, deleting repetitive information from the header.

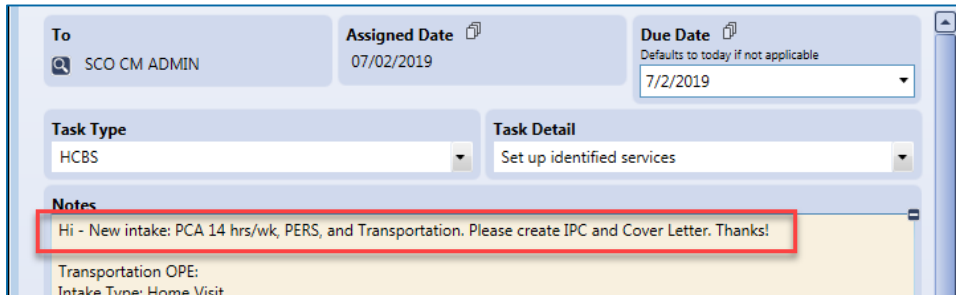


Double check that **Primary Diagnoses and code** and **Servicing Provider** in the OPE Shell are correct for the services requested after them.

1. **Task Type:** HCBS
2. **Task Detail:** Set up identified services
3. **Notes:** Right click inside the Notes field and select Standard Text → SCO CM → OPE Template(s) needed



- At the top of the Task going to the CM Admin Team, the CM will summarize the services being requested and ask that the Admin create an **IPC** and **IPC Cover Letter** by adding **“Please create IPC and IPC Cover Letter.”**

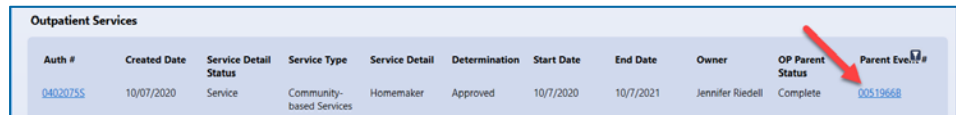


**NOTE:** If the IPC and Cover Letter are not requested, the SCO Admin Team will not send them.

- When picking up the **Task**, the SCO Admin will:
  - Create the **Outpatient Event** in CaseTrakker.
  - Create **Referral Forms** in CaseTrakker for FI, PCM, AFC, ADH and GAFC requests, fax the form to the Provider, and mark in CaseTrakker as **Sent**.
  - Follow up with the Provider to be sure they received the faxed referral following their current workflow.
  - Create the IPC and IPC Cover Letter **only if indicated by the CM**.
- Within 30 Days:** The Care Manager is responsible for checking the member's record to confirm that the **IPC** and **IPC Cover Letter** were created and mailed to the member and their PCP.

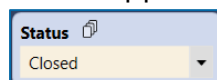
**Annually:** The Care Manager is responsible for maintenance of the member's OPEs. This means that as part of their Annual Assessment, they will:


- Extend the **End Dates** of current OPEs for services that will continue.
- Closing OPEs for services that are no longer needed:
  - Click the link under **Parent Event #** to open the OPE.




Auth #	Created Date	Service Detail Status	Service Type	Service Detail	Determination	Start Date	End Date	Owner	OP Parent Status	Parent Event #
04020755	10/07/2020	Service	Community-based Services	Homemaker	Approved	10/7/2020	10/7/2021	Jennifer Riedell	Complete	<a href="#">00519668</a>

- In the upper right hand corner of the OPE, change the **Status** to Closed.



Status 

Closed 

- c. Scroll down and select the appropriate **Closed Reason** (usually “Services Rendered”). The **Closed Date** will populate with today’s date.

Closed Reason	Closed Date
Services Rendered	10/20/2020
Withdrawn by Member	
Withdrawn by Provider	
Member Expired	
Disenrolled	
Other	

- d. Scroll down to the approved service and change the **End Date** to match the **Closed Date**. This will ensure that Claims will not continue paying for the service after it is no longer needed.

Approved					
Service Type	Service Detail		Requested Units	Requested Frequency	
Community-based Services	Homemaker		8	Units	per week
Start Date	End Date				
10/7/2020	10/7/2021				

As the Closed Date is 10/20/2020, the End Date will need to be changed to match

3. If there are no changes to HCBS: Create the **IPC** and **IPC Cover Letter** after extending the OPE end dates, and place both in **Ready to Send** status.
4. If there are changes to HCBS:
- Follow steps a-d above to Close the OPEs that are changing or no longer needed.
  - Follow steps 1-5 above to request new HCBS by tasking SCO Admin Team and GSSC.



Remember, SCO Admin Team will only send the IPC and IPC Cover Letter if requested by the Care Manager in the Task.



**DON'T FORGET:** The CM is responsible for ensuring the IPC and IPC Cover Letter is mailed within 30 days.