

## CASE MANAGEMENT (CM) STEP BY STEP PROCESS

**[Step 1]**– The ODJFS HOME Choice Intake and Care Coordination Unit (HCICCU) receives a HOME Choice referral via the *HOME Choice Application*.

The HCICCU verifies if an ODJFS 2399 has been completed and if the consumer is on any current waiver waiting lists. If the consumer is currently on a waiver waiting list, the HCICCU sends a copy of the *HOME Choice Application* and a request for a HOME Choice assessment to the HOME Choice contact at that waiver program's state administrative agency.

If the consumer is not currently on a waiver waiting list, the HCICCU identifies which waiver entity will most likely meet the consumer's needs and instructs the consumer to complete and submit an ODJFS 2399 to the appropriate entity.

The HCICCU sends a copy of the *HOME Choice Application* and a referral for a HOME Choice assessment to the HOME Choice contact at identified waiver program's state administrative agency.

**[Step 2]**– The waiver program's state administrative agency sends copies of the *HOME Choice Application* and referral for a HOME Choice assessment to the local waiver entity.

**[Step 3]**– The CM receives referral or identifies through normal course of business that a consumer is interested and a likely candidate for HOME Choice.

**[Step 4]**– The *HOME Choice Application* is completed if needed. The CM determines HOME Choice and Waiver eligibility and completes the *HOME Choice Eligibility Checklist*. If it appears the consumer will be eligible for HOME Choice, the CM initiates the informed consent process and has the consumer and/or guardian sign the *HOME Choice Informed Consent Form*.

The CM works with the consumer to choose a transition coordinator. The CM authorizes transition coordination on the *HOME Choice Demonstration and Supplemental Services Service Plan*.

The *HOME Choice Application*, the *HOME Choice Eligibility Checklist*, the *HOME Choice Informed Consent Form* and the *HOME Choice Demonstration and Supplemental Services Service Plan* are sent to the ODJFS HOME Choice Intake and Care Coordination Unit (HCICCU) as applicable.

\*Please note that eligibility for or enrollment in a waiver program is not required for HOME Choice enrollment.

**[Step 5]**– The HCICCU pre-approves enrollment of participant into HOME Choice and sends the CM, consumer and guardian, if applicable, notice of pre-approval for the program. If a consumer is found to be ineligible for Home Choice, the HCICCU denies the consumer HOME Choice enrollment and sends notification of the denial and hearing rights to consumer, CM and guardian.

**[Step 6]**– Upon receipt of a referral ODJFS sends the *HOME Choice Participant Handbook* to the participant and guardian or authorized representative as indicated on the application form. This may occur earlier in process if referral is received directly by the HCICCU.

- [Step 7]**– The HCICCU notifies chosen TC provider of referral and verifies willingness/ability to work with consumer. The HCICCU submits the service plan to the Financial Management Service Contractor for payment to the transition coordinator.
- [Step 8]**– The CM works with the transition coordinator to develop a service plan for post-discharge. The CM serves as the lead for scheduling and coordinating team meetings for the purpose of consumer’s discharge planning.
- The TC works with the consumer to identify how transition services (good and services) will be utilized. The TC submits the *HOME Choice Use of Transition Funds* to the CM. The CM authorizes community transition services (the goods) on the *HOME Choice Demonstration and Supplemental Services Service Plan* and submits the service plan along with the *HOME Choice Use of Transition Funds* (see TC forms) to the HCICCU.
- [Step 9]**– The HCICCU submits approval to the Financial Management Service for community transition services.
- [Step 10]**– At least two weeks prior to actual discharge, the CM requests a Pre-Discharge Quality of Life Survey by submitting the *HOME Choice Request for Pre-Discharge Quality of Life Survey* to the HCICCU. The HCICCU initiates the Quality of Life Survey prior to discharge.
- [Step 11]**– At time of discharge, the CM completes waiver enrollment procedures through the regular waiver process AND completes the *HOME Choice Enrollment Form*. The *HOME Choice Enrollment Form* is submitted to the HCICCU.
- [Step 12]**– The HCICCU officially enrolls the participant into HOME Choice and sends the consumer, case manager and guardian, if applicable, official notification of the consumer’s enrollment on the HOME Choice program.
- [Step 13]**– The CM submits to the HCICCU a revised *HOME Choice Demonstration and Supplemental Services Service Plan* listing all of the specific HOME Choice services authorized during the 365 day demonstration period. The HCICCU submits approval to the Financial Management Service Contractor for payment to HOME Choice service providers. During the demonstration period, the CM makes changes to the *HOME Choice Demonstration and Supplemental Services Service Plan* as needed and forwards to the HCICCU.
- [Step 14]**–The CM proceeds with case management activities typical of a waiver enrollee. If for some reason, there is a change in status that impacts HOME Choice enrollment, the CM is required to submit to the HCICCU the *HOME Choice Change in Status Form*.