

Client-Centered Case Management Logic Diagram—DRAFT 2019

Definitions

Referrals

Referrals to the client-centered case management program come from individual older adults or their families, neighbors or friends, social service agencies (to include ADRC), medical clinics, clergy, hospitals, or other professionals. During the referral process, the case manager attempts to gather initial information from the potential client in order to determine what assistance is needed and verifies the client resides within the case manager's defined service area, is not currently case managed under another program, and does not live in assisted-living or skilled nursing facilities.

Assessment

Assessment is conducted during face-to-face meetings and information is gathered to determine whether the person needs on-going case management services. When appropriate, Client Intake and Functional Assessment forms are initiated. Requests for services are followed-up in a timely manner to determine eligibility for client-centered case management services.

Open Case

A case is opened when the following steps have been taken:

1. The case manager had a face-to-face meeting with the client;
2. The case manager determined on-going case management was required;
3. Client Intake and Functional Assessment Forms were completed;
4. A Case Management Service Plan was developed; and
5. A course of action for service was initiated.

Case notes are documented proof the client received services from the case manager. Case notes should also reflect the service plan developed with the client. A case remains open as long as the client's needs are being met with the service plan. An open case involves continued contact with the case manager and annual reassessments.

Reporting

Case managers are required to report specific, identifiable services for each client on the Dane County Monthly Client Service Report (610 Form). This form should be completed and emailed to Dane County Human Services by the tenth day of the following month. Electronic documents sent by email must include the standard confidentiality statement. Case managers are expected to securely maintain appropriate and up-to-date documentation in support of the monthly reports requested by the County. The hours reported on the monthly 610 form for each client shall match/equal the hours of service documented in case notes.

Closed Case

The client-centered case management program has no time limit for a person to receive services. However, cases shall be closed when any of the following events occurs:

1. There is no activity on a client file for a period of one year; or
2. The client withdraws from the program or no longer needs client-centered case management services; or
3. The client enrolls in a Family Care Model Program (e.g., Family Care, Partnership, IRIS); or
4. The client enters an assisted-living facility, nursing home, or CBRF; or
5. The client moves to a residence outside of Dane County; or
6. The client dies.

In each case, the file shall be closed and be removed from the open case history count until reopened or shall be archived for a period no less than seven (7) years.

