ECM Task / SCM Task	ECM/SCM Communication and Transfer Process			Revised 9/17/24 *on Provider Page Revised 10/25/24 (Bold=New, strikethrough=Removed)	
Process Task	**Multco/ECM will provide a list of existing clients who will be evaluated for OPI-M to Partner Agencies prior to the beginning of each month.**	**SCM will contact existing case managed (OAA or OPI) clients on the list to inform the client that an ECM will be contacting them.**	**SCM will identify clients on the list who need a joint home visit**	**ECM will schedule and complete home visit with client.**	**ECM will complete the eligibility determination and transfer approved referrals to Partner Agencies.**
Process Details	- List will be provided via Smartsheet 2 weeks prior to the beginning of each month. Note: The list may be visible in Smartsheet sooner but is not complete and ready until 2 weeks prior. - Provide list 1 month at a time. - Multco will add clients to OA a minimum of 2 weeks prior to the 1st of the month. Note: Lists are a combination of waitlist clients, clients who had a CAPS assessment completed 5 months prior, and OPI-E clients Waitlist Notes: Partners have access to see the status of all referrals (approved, withdrawn, denied) on their list in the Smartsheet. After eligibility is determined, the ECM team removes clients from the waitlist as needed. If someone on the monthly list has an eligibility determination status, and are still on the waitlist, they are waiting for OPI. A closed OPI-M referral in UCR is also an indication they have been asssessed for OPI-M and are choosing to remain on the OPI waitlist.	- SCM will make multiple attempts to contact clients - SCM will narrate in OA, using provided narration template, for attempted and completed contacts - SCM will mail the state letter with the agency letterhead to existing clients they are unable to reach. Note: SCM will establish client expectation that the ECM may not call until the end of the month. Note: SCM only contacts clients they are currently case managing through OPI or OAA and does not contact OPI-E clients or those not currently case managed by the partner agency.	- A joint home visit may be offered to some clients. Due to capacity, joint HVs will be the exception. - If the client is not currently case managed, a joint home visit will not be offered - SCM will request joint home visit by narrating call in OA, using template	- ECM will make 2 contacts via phone or email. The 3rd attempt will be a letter sent to the client's mailing address notifying them of the attempts and they should respond within 10 days or the request will be closed. **CONSUMER IS APPLYING TO OPI-M:** **- ECM will establish DOR (date of request)** **- ECM will request OA2 to send out application packet, as needed** **- ECM will schedule HV** - If a joint HV is requested in OA narration, ECM will contact SCM with HV scheduling details. - ECM will offer any supports identified to be present at the home visit - ECM will schedule interpreter as needed **CONSUMER IS <u>NOT</u> APPLYING TO OPI-M** **- ECM will withdraw on Smartsheet** **- ECM will add to interest list as needed** **- ECM team will remove from OPI waitlist as needed**	UCR: Multco will transfer referral in UCR to partner agency. If the SCM is known, they will be assigned as the case manager. If the SCM is unknown, the referral will only be assigned to the partner agency and the case manager will be "unassigned" in UCR. OA: ECM will transfer the referral to the partner agency in OA. Partner agency will need to assign the SCM in OA. Email: ECM will use an email template to notify partner agency of new OPI-M client. Additional information will be narrated in OA. - Each partner agency will have a primary contact (supervisor or referral email) identified to receive new OPI-M cases. If a client is currently case managed, the case manager will also receive the email.