

Service Case Manager

Service Case Manager Checklist

New OPI-M Client

Once you've received an email from Multnomah County ECM Team that you have a new OPI-M Client, follow the steps below:

- Review the CAPS Assessment prior to home visit (Optional: Print a copy for the In-Home visit)
- Schedule an In-Home visit to complete the Service PLAN, Narrate in OA
- Complete Service PLAN (**Contact within 14 days complete within 30 days of financial eligibility determination**)
 - Complete Unpaid Caregiver Assessment Tool - UCAT (if applicable)
 - Complete 737 Representative Choice Form
- Complete Risk Assessment in Oregon Access (OA)
- Complete 003N CAPS Client Details Form in OA
- Enter services defined in the PLAN into OA
- Upload PLAN and documents to UCR, using naming convention
- Add to contact tracker/ add calendar reminder for contacts based on PLAN direct contact frequency decision.

Service Benefits

In-Home Services

- Contact the HCW regarding the plan and additional hours (if existing OPI client).
- Complete the 546 In-Home Service Plan in OA
- Complete the 598 Task List in OA
- Complete the 354 Workers Compensation Agreement and Consent in OA. Print and bring the 354 to the In-Home Visit for the client's signature. (**ONLY** if they are getting a HCW)
- Complete the 4105 HCW Notice of Authorized Hours and Services in OA
- Fill out the ADVSD OPI HCW Inquiry Form
- Email the 546 to the OPI.Vouchers inbox

Chore Services, Assistive Technology, Special Medical Equipment and Home Modification

- K-Plan (Form 3406-OPIM)

Home Delivered Meals

- Meals on Wheels Referral Form

Long Term Care Community Nursing

- 0753 Form LTCCN Program Client Referral
- 3010 Form Release of Information

Emergency Response System

- ERS - Prior Authorization Form for Emergency Response Services