

**If a referral for LTCOC was taken by your agency and passed on to one of the Options Counseling staff;**

1. Create a 'New Call'
  - a. All LTCOC documentation must go through the Call Log/New Call function
  - b. You can NOT use "anonymous" in the Call screen – for caller or consumer.
    - i. You must at least get the name of the person you are speaking with.
    - ii. If either of the caller/consumer fields are anonymous, it can not be considered LTCOC
2. Enter the topic of '*LTCOC I&R Only*' in the Call Log
3. The Mutual I&R Form (form is dated June 2009) should be completed and emailed to the OC's and Kathy

## Recording LTCOC when the OC service was provided in-ASAP

1. Create a New Call
2. Caller's name
3. Consumer's name
4. Choose only one Topic (LTCOC – Goal \_\_\_\_ ) based on consumer's goal, but not 'I&R only')
  - a. LTCOC – Goal LTC Facility Admission
  - b. LTCOC – Goal to Stay in Community
  - c. LTCOC – Goal Re-Entry to Community from Acute Hospital
  - d. LTCOC – Goal Re-Entry to Community from LTC Facility
  - e. LTCOC – Goal Re-Entry to Community from Rehab Facility

**Social Assistance Management System - [Toth, Annie / Kuhl, Emily - Call]**

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches

New Call Call Log Search for Services

Dashboard Call Log Toth, Annie / Kuhl, Emily - Call

Close Call Save Save and Close Pause Print Preview Call Print Call Caller Consumer

Call - Summary	
Caller	Toth, Annie
Caller Type	Discharge Planner
Referred By	ASAP
Consumer	Kuhl, Emily
Age Group	
Gender	Female
Disabilities	
Call Type	Incoming
Call Priority	
Call Timer On	Yes
Start Date	06/15/2010
Start Time	06:11:49 PM
End Date	06/15/2010
End Time	06:27:11 PM
Complete?	No
Primary Payment Source	
Notes	Discussion about services

**Topics**

- LTCOC - Goal LTC Facility Admission

**ADRC Activities**

(none)

**Referrals**

(none)

**Activities**

(none)

**Consumer Assessments (this call)**

(none)

**Caller Assessments (this call)**

(none)

**Service Deliveries**

(none)

**Existing Call Notes for Kuhl, Emily**

4/2/2010 11:17:30 AM - inforef : nursing homes that take short term masshealth and have

LGLATTANDERSON SAMS2K\_SIMS 6/15/2010 6:27 PM

5. Save and Close the call / Reopen the call
6. Enter the Units of Service
  - a. When OC is provided, there should be units of at least one

- i. Options Counseling -Face to face
    - ii. Options Counseling - travel
    - iii. Options Counseling – telephone
  - b. The units of service delivery date should correspond with the actual dates of service
- 7. Complete? should be No
- 8. Any notes related to the call (what was discussed, what was referred, etc.) should be entered in the Notes (NOT in Journal Entries)
- 9. Create an Activity
  - a. Action: LTC – Follow Up
- 10. Save and Close the call
- 11. Thirty days later, call the consumer to determine outcome, ask about survey and find out survey method (phone, web, mail)
- 12. Document the follow-up
  - a. Re-open the Call previously documented
  - b. Double-click on the previously chosen Topic to open the Topics window
    - i. Choose an Outcome (to the right of the previously chosen topic).
      - 1. Home with no services
      - 2. Home with services
      - 3. LTC/Rehab/Hospital Admit (by choice)
      - 4. LTC/Rehab/Hospital Admit (obstacles)
      - 5. Unable to Contact/Deceased/Cancel
  - c. Enter new units of service needed for the follow-up
    - i. Options Counseling – telephone
      - 1. 1 unit per 15 minutes
      - 2. Service date is day consumer successfully contacted for follow-up
  - d. Indicate in Notes the survey method the consumer chose.
  - e. In the Call – Summary, change Complete? from No to Yes.
- 13. Send survey as was chosen
  - a. phone (you'll be giving their name and # to EOEA to call them to do the survey over the phone)
  - b. web based (you'll need to ask them for their email address so you can email them the link to the web based survey)
  - c. mail (you'll put in the mail to them a hard copy of the survey for them to complete and mail back to Elder Affairs)
- 14. Complete the Activity for LTC – Follow Up
- 15. Save and Close the Call