

## Case Management Workflow/Duties – Josette Rojo, Case Manager



- Wednesdays and Thursdays
- Call all patients who are scheduled to speak with prescriber that week
  - a.Script for follow-up calls, voicemails, and texts
  - b.If people don't answer on Wednesday follow-up, call and text patients on Thursday to let them know about appointment

Schedule

- MAT Physicals
- Behavioral Health Intakes
- Urine drug screen appointments
- Weekly appointments
  - a. Send provider schedule of the day via email
  - b.Debrief any patient updates/announcements in the email
  - c. Appointment reminders 30-60 minutes in advance of appt

Cures Reports

Upload cures report before appointment day for provider



- Sign documents for patient if phone visit
- Input patient virtual visit
- Complete patient hub information when new patient
- Input patient's pharmacy information
- Figure out patient's eligibility (if not PCP with us or PCP patient to our clinic)
- Send prescriber summary about patient's history and assessment
- Make sure all is scheduled:
  - a. MAT Physical
  - b. Weekly appointment
  - c. Behavioral Health Intake (is patient eligible for behavioral health?)
    - i. Confirm behavioral health eligibility for all MAT patients and coordinate with behavioral health as needed





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eCW Electronic Health Record

- Scheduling
- Patient follow-ups
- Answer TEs
- Fax for medical records

Eligibility

- Medicaid/medicare
- Calling private insurance
- Setting up own insurance accounts

**Excel Sheets** 

- MAT Attendance
- MAT Patient Schedule
- Eligibility List
- MAT Community Partners List
- MAT Labs & Quest Lab information
- MAT Active Sheet
  - Fill out pending patient info on this sheet when conducting MAT Assessment with patient

Specific Prescriber's Patients

- Weekly follow-up
- Schedule weekly Tuesday appointments
- Weekly urine analysis (some patients)
- Pull up Cures before appointments for each patient