Case Management Workflow/Duties – Josette Rojo, Case Manager

**Follow-Ups**
- 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

**MAT Assessments**
- 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
Case Management Workflow/Duties – Josette Rojo, Case Manager

**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