



## 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



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