DDS

State of Connecticut

Electronic Case Note Training Manual

For

Case Management

For use by DDS Case Management Staff Only

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Overview

The DDS Electronic Case Notes application will allow case managers and case management supervisors to enter case notes for DDS Consumers reflecting their case management activities. In addition, the system has the ability for clerical support staff to enter case note information into the application if necessary. Each note will be for a specific DDS Consumer, and will have a note date and note type as well as the text of the note. The case notes will be kept historically and will follow the consumer if they transfer to another case manager. The notes will be viewable by other authorized DDS Staff via either the application screens and/or reports.

The Electronic Case Note System was developed to meet the change in billing requirements initiated by CMS. This system allows DDS to move one step closer to developing an electronic case record. The electronic case note system will provide a data system to document all case notes and will be able to provide DDS with data systems to justify the TCM services that we are billing and providing to our consumers.   Additionally, DDS will be able to pull the TCM audit data for sampled waiver participants and verify the data.

Acknowledgement

The Electronic Case Note System is a result of collaboration between Case Management, Waiver Management and System Improvement, Information Technology, Audit and Fiscal Services, Human Resources, and the original Web IP workgroup. Their vision and dedication made this project a reality.

Confidentiality HIPAA Reminder

As a reminder you will have access to information in the electronic case note system that contains information that is confidential and HIPAA protected. It is intended only for the use of the individual(s). Do not distribute, or copy this information or disclose its contents or take action in reliance on the information it contains.

Why do we do Case Notes?

There are three reasons case notes are kept by DDS case manager.

1. **Historical** record of the services provided by the case manager and the department. This is good practice as a service provider. Case notes help provide continuity when cases are transferred. Case notes justify need for continued services and demonstrate services were provided.
2. **Targeted Case Management (TCM)** this allows the state of Connecticut to bill the federal government for services provided by case managers. Under TCM case management is the service we are providing.
3. **HCBS Waiver Progress Review**: Record the status of the waiver services that are being provided to the consumer by DDS Waivers.

Guide to Services Rendered

New

TASK	TCM DOMAIN	ACTION WORDS
1. Reviewing the file	Assess/re-assess	Reviewing
2. Schedule appointment(s)	Monitoring/Referral/Coordinating	Arranging coordination, advocating, planning, obtaining
3. Initial Meeting	Assess/re-assess Referral/Coordination of service	Reviewing, assessing, collaborating, obtaining, referring, notifying, arranging
4. IP, IPS, PT complete, transcript, mailing	Develop Plan/Assess-re-assess	Reviewing liaising, facilitating, collaboration, advocacy, maintaining, obtaining, planning, coordinating, monitoring
5. LON completing, inputting, mailing	Assess/re-assess, monitoring, develop plan	Conducting/reviewing/obtaining, collaborating, assessing, inputting, facilitating, liaising
6. DDS/SSA entitlements, Waiver: initial & redetermination/HUD/Section 8/energy assistance, rent subsidy	Referral/Coordination of service. Assess/Re-assess Monitoring/follow up	Assessing, completing, assisting, referring, coordinating, maintaining, reviewing
7. PRAT/URR, lx funding, IEP, respite, HHA referrals, IFS Resource Team, forensic support, psych hosp admin., & mortality	Referral/Coordination of service. Assess & re-assess	Referring, collaborating, obtaining, arranging, assessing, reviewing, maintaining, inputting, coordinating

8. Budget (adjustments, renewals, prior approvals)	Referral/Coordination of service. Assess/re-assess needs	Inputting, collaborating, maintaining, monitoring, reviewing, renewing, adjusting, amending
9. Guardianship (initial & 3-year review). Probate Court and legal assist. Involves completing, inputting & mailing	Monitoring/follow-up. Assess & Re-assess	Assessing, arranging (monitoring) completing
10. 6-Month review	Assess/re-assess. Monitoring & follow up also include comment about progress	Reviewing liaising, facilitating, collaboration, advocacy, maintaining, obtaining, planning, coordinating, monitoring
11. QSR conducting	Monitoring & follow up	Input, transcribe, conducting, monitoring, reviewing, following up, obtaining, & collaborating
12. Correspondence (FI, DDS, IFS Resource team, LEA, medical professionals, family & providers	Referral/Coordinating of service. Monitoring/follow up	Advocating, coordinating, obtaining, planning, arranging, liaising, reviewing, & collaborating
13. Filing/TCM/CM notes, e-camris	Coordinating services	Updating record, documenting
14. Incident reports	Monitoring/follow up/assess/re-assess needs	Oversight, planning
15. Investigations (OPA, PSP, IPSP)	Assess/re-assess. Referral/coordination of service. Monitoring/follow-up	Monitoring, advocating, assessing, re-assessing, developing, arranging, collaboration & notifying
16. Transition meetings	Monitoring & follow up	Obtaining, coordinating, facilitating, liaising, maintaining, planning, advocating, & reviewing

Administrative Activities, Reallocated Activities (TCM Billable Services)

Admin Activity includes related paperwork, clerical activities, for example:

- Performing support activities for the administration of the TCM program.
- Time spent on filling out forms related to individual.
- Reviewing information pertinent to the individual.
- Performing clerical activities related to general case management operations.
- Performing clerical activities specific to case management areas.

Examples: Non-TCM Services (Case note can be done but not billable)

- Directly assisting with personal care or ADLs (activities of daily living), e.g., assisting with budgeting, cooking, shopping, laundry, moving residences, payee services, etc.
- Performing routine services including courier services, e.g., running errands or picking up and delivering food stamps or entitlement checks, etc.
- Providing other services that are billable through Medicaid, e.g., medical exams, treatment, therapy, counseling, etc.
- Transporting a individual or family member
- Unsuccessfully attempting to provide a service such as calling and leaving a message; no shows, cancellations, etc.

If you need additional clarification please discuss with your supervisor.

Frequency of Documenting Case Notes

Upon training case managers will document all services provided to individuals in the electronic case note system. For those individuals TCM eligible services need to be documented a minimum every 90 days by the case manager (minimum 4x's a year).

Other Important Information

Case notes do not need to be printed out and put in the individual case record.

For Mortality review send as a PDF. New

For Health Dept or Licensing Review print out what is requested. New
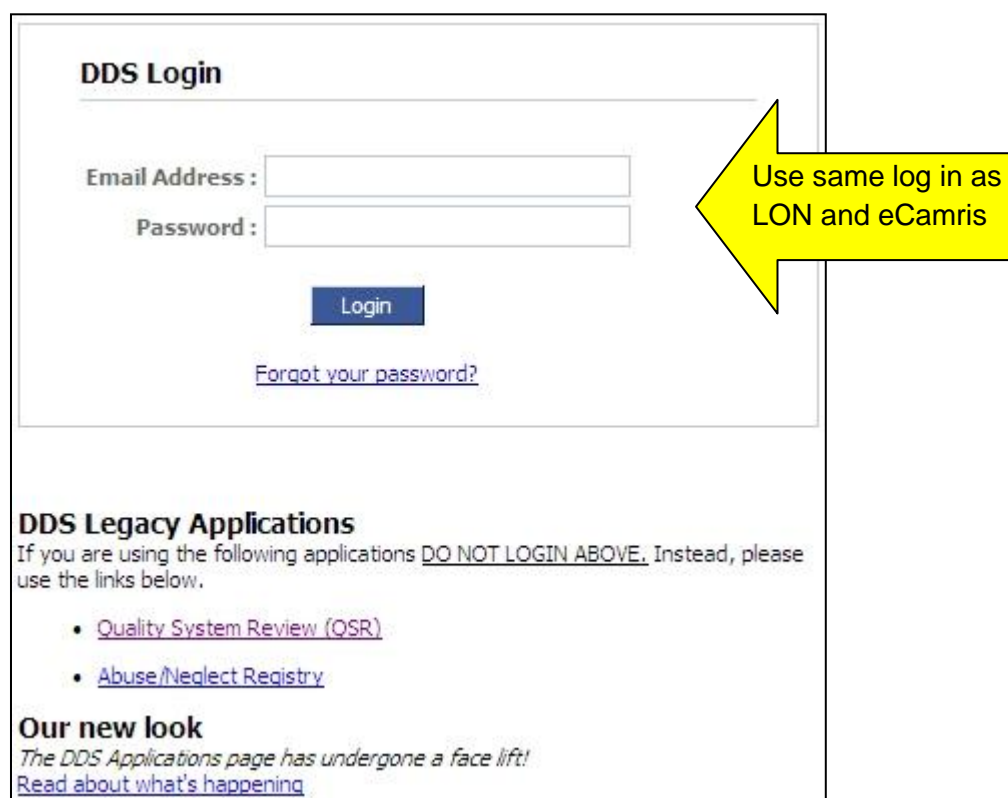
Case notes should be written based on factual information.

Expectation that case notes will be done as services are provided.

Email dds.helpdesk@ct.gov with system specific issues.(NOT Individual case issues)

Speak with your supervisor and contact DDS Waiver Unit for waiver related issues (not helpdesk).

DDS Login

Choose Case Note

Note: In order to access the case note application you must have the same role in the LON application as well

Searching Case Note System

Choose Find Case Note

How to search for specific consumer.

How to Search entire caseload

Choose Search and

Case Manager Number: NR225
Consumer Search

DDS #: [   ]

Uncheck Limit to Active to find consumers who have been discharged or deceased.

Limit to Active: ☑   Limit to My Case Load: ☑

Last Name : [   ]   FirstName : [   ]

[Search]   [Create Note]

Choose Search and you will get entire case load

Consumer List - Case Managers CaseLoad for: NR225

	DDS #	Last Name	MI	First Name	DOB	Region
☐	24117	BO		R	06/ '1950	NR
☐	27537	BR	A	J	07/ '1982	NR
☐	37719	BR		J	01/ '1982	NR
☐	26578	BR		A	07/ '1979	NR
☐	48047	BU	E	C	06/ '1973	NR
☐	17451	CA		P	12/ '1947	NR
☐	49080	CA		S	02/ '1987	NR
☐	30272	CL		C	07/ '1934	NR
☐	16820	CL		L	02/ '1965	NR
☐	8731	CO	C	DO	03/ '1950	NR
☐	45616	CO		KA	12/ '1958	NR
☐	27130	CO		C	07/ '1979	NR
☐	29955	CO		W	08/ '1965	NR
☐	28154	DE	P	J	08/ '1972	NR
☐	29343	DE		M	05/ '1984	NR
☐	50683	DU		A	09/ '1983	NR
☐	31094	FA	J	W	09/ '1966	NR
☐	27843	FE		R	09/ '1978	NR
☐	16125	FC	J	D	01/ '1947	NR
☐	47467	GA	R	JA	12/ '1967	NR
☐	21031	GO		D	11/ /1956	NR

How to choose multiple consumers to Create New Case Notes

Case Manager Number: NR225
Consumer Search

DDS #: [   ]

Limit to Active: ☑   Limit to My Case Load: ☑

Last Name: [   ]   FirstName: [   ]

[Search]   [Create Note]

Consumer List - Case Managers CaseLoad for: NR225

	DDS #	Last Name	MI	First Name	DOB	Region
☑	24117	B		R	06/ '1950	NR
☐	27537	B	A	J.	07/ '1982	NR
☐	37719	B		J.	01/ '1982	NR
☑	26578	B		A	07/ '1979	NR
☐	48047	B	E	C	06/ '1973	NR
☐	17451	C		P	12/ '1947	NR
☐	49080	C		S	02/ '1987	NR
☐	30272	C		C	07/ '1934	NR
☑	16820	C		L	02/ '1965	NR
☐	8731	C	C	D	03/ '1950	NR
☐	45616	C		K	12/ '1958	NR
☐	27130	C		C	07/ '1979	NR
☑	29955	C		V	08/ '1965	NR
☐	28154	D	P	J	08/ '1972	NR
☐	29343	D		M	05/ '1984	NR
☐	50683	D		A	09/ '1983	NR
☑	31094	F	J	V	09/ '1966	NR
☐	27843	F		R	09/ '1978	NR
☑	16125	F	J	D	01/ /1947	NR
☐	47467	G	R	J.	12/ '1967	NR
☐	21031	G		D	11/ '1956	NR
☐	31669	G		D	05/ '1969	NR
☐	48077	G		D	10/ '1982	NR

1. With multiple consumers selected click the Create Note button at the top of the screen.
2. You will be brought to the first consumers blank note screen to create a note.
3. Upon completion of the note click the Complete and Next button to move to the next selected consumers Note Screen.

You can select a specific consumer by clicking on the DDS # link next to their Last Name. This allows you to view/edit prior notes or create a new note for that specific consumer. Checking the box next to a single consumer's name will only allow you to create a new case note.

Electronic Case Notes Training Manual updated 2-1-2011

Entering a New Case Note

How to create a new case note for a single consumer.

1. With the consumer's Case Notes summary screen displaying click the Create Note button
2. You will be brought to the screen above with basic consumer information populating the fields (DDS #, Name, Waiver Status, Case Manager, TCM Eligible)

4. Clicking in the Note Date field will display the calendar icon.
5. Use the Month and Year dropdown fields to select the desired Month and Year
6. Click on the date to select the date of actual service
7. Can pick date back to 11/1/2010 but not future date.

8. Select a value from the Note Type dropdown field
   Note: A Note Date and Note Type _must_ be selected for all Case Notes

Consumer Case-Note Information

DDS #: 24   Last Name: B   First Name: R
Waiver Status: HCB   Case Manager: Jennifer Schoolnick   TCM Eligible: Yes
Note Date: 12/14/2010   Note Type: TCM   Location: [dropdown]

Home
Office
Other

Home: Individual's Residence
Office: DDS Office
Other: All other Locations
Close | Don't show this message again

Location of service provided

Service(s) Rendered

☐ Assess/Reassess Needs   ☐ Develop Plan
☐ Referral/Coordination of Service   ☐ Monitoring/Follow-up

Note

[Complete & Next] [Save Draft] [Save Draft & Next] [Delete]

9.   Select a value from the Location dropdown field
10. Check applicable Service(s) Rendered
Note: Location and at least one Service(s) rendered are required for TCM Note Types

Consumer Case-Note Information

DDS #: 24   Last Name: B   First Name: R
Waiver Status: HCB   Case Manager: Jennifer Schoolnick   TCM Eligible: Yes
Note Date: 12/14/2010   Note Type: TCM   Location: Office

Service(s) Rendered

☑ Assess/Reassess Needs   ☐ Develop Plan
☐ Referral/Coordination of Service   ☑ Monitoring/Follow-up

Note

Test Entry of Case Note information.

See below

[Complete & Next] [Save Draft] [Save Draft & Next] [Delete]

Detailed description of the services provided and the plan

Description of the services provided such as:
Progress towards plan goals

Obtaining, coordinating, maintaining resources and services (e.g., housing, entitlements, employment, legal assistance, guardianship, education, transportation, etc.)

Planning, arranging, coordinating, obtaining, monitoring Liaising or following up on specific aspect of IP(e.g. medical tx, day program, residential, respite, budget, appointments with other providers)

Working with and collaborating with collaterals external to the agency including family members, landlords, employers

Engaging the individual in services (new or unengaged individuals)

Close | Don't show this message again

Complete Next is to complete case note and move to next one selected.
Save Draft you have not completed the case note and plan on coming back to complete.
Save Draft &Next not complete but want to move to another case note
Delete this will delete all you just entered on this consumer

If it is the last consumer selected and you choose **Complete and Next** this is the message you will receive Click OK to continue.

You will return to the Find Case Note Screen

Other Features of the Electronic Case Note System

Viewing and Filtering the Consumer Case Note Screen

Unfiltered Case Notes Consumer List

Consumer
DDS #: 24   Last Name: B   First Name: R   DOB: 6/ /1950 Region: NR

Case Note Search
Start Date: End Date:

Note Type: [ ]   Status: [ ] | If you Click on DDS Number link it
Note Text: [Search] | will bring you that case note
                        [Create Note] | screen for editing or viewing.

Case Notes List:

View Report	DDS #	Note Date	Status	IsBilled	Note Type
📄	24	11/04/2010	Complete	Not Billed	General
📄	24	11/03/2010	Complete	Not Billed	TCM
📄	24	11/01/2010	Complete	Not Billed	General
📄	24	11/01/2010	Complete	Billed	TCM

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Consumer List filtered for Completed TCM Notes between 11/1/2010 and 11/30/2010

Consumer
DDS #: 24   Last Name: B   First Name: R   DOB: 6/ /1950 Region: NR

Case Note Search
Start Date: 11/1/2010   End Date: 11/30/2010

Note Type: TCM   Status: Complete | This screen is filtered for a date
Note Text: [Search] | range of between 11/1/2010 –
                        [Create Note] | 11/30/2010 for Completed TCM
                                            | Notes.

Case Notes List:

View Report	DDS #	Note Date	Status	IsBilled	Note Type
📄	24	11/03/2010	Complete	Not Billed	TCM
📄	24	11/01/2010	Complete	Billed	TCM

Once billed you cannot edit but you can view contents in the report but not in the screen. (See Below)

Individual Case Notes Report

(this is the only way to access info on a billed TCM Case Note)

Case - Notes Report

Printed 12/22/2010 10:34:48 AM	For an individual consumer and specific case note	Page 1 of 1

DDS#: 24   **Consumer Name:** B   R   **Case Manager Name:** Schoolnick Jennifer   **Waiver Status:** HCB

Note Type: TCM   **Location:** Office   **Case Note Date:** 11/3/2010   **Completed:** Yes

Services Rendered:

Monitoring/Follow-up

Case Notes: 20

hi
updated ljkkjkjkj

PDF document can be emailed or saved.

Sample Error when no consumer is selected.

User:Schoolnick Jennifer, Role:Case Manager

Error. No consumers are selected for Create Case Note. Please select a consumer.

Case Manager Number: NR225
Consumer Search

DDS #: [   ]

Limit to Active: ☑   Limit to My Case Load: ☑

Last Name : [   ]   FirstName : [   ]

[Search]   [Create Note]

In the above screen a consumer must be selected in order to use the Create Note button.
To look at consumers no longer active uncheck Limit to Active Button.

Case Notes Reports

Case Notes Report Screen

There are two reports currently available:
1. The Summary Report displays any consumers who have had case notes written for them
2. The Incomplete/Missing TCM Case Notes By Quarter displays any **TCM Eligible** consumers who have not had a completed TCM note done in a given quarter

Case Notes Summary Report

Case Manager
Blank Summary Report...without applying any filters it will give you your entire caseload.

Note: The consumers displayed in the summary report are only those consumers in your caseload who have had a case note. Consumers with no case notes will not display in this report.

Filtering the Summary Report
Choose Date Range

Choose Note Type and Status and Click view result button [View Result].

This will display consumers who have had case notes with note dates within the specified date range meeting the Note Type (TCM) and Status (Complete) filters.

Click Summary Report Button [Summary Report] to view Case Notes Summary Report

Printed 1/3/2011 10:10:49 AM		Case - Notes Summary Report					Page 1 of 1
		For Case Manager Case's Consumers					

Supervisor Name: Blaszko Michael

Case Manager Name: Schoolnick Jennifer (NR225)

DDS #: 24		Consumer Name: B	R		Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered		
	11/3/2010	TCM	Office	Complete	Monitoring/Follow-up		
	11/1/2010	TCM	Home	Complete	Assess/Reassess Needs		
DDS #: 37		Consumer Name: B	J		Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered		
	11/2/2010	TCM	Office	Complete	Assess/Reassess Needs		
DDS #: 28		Consumer Name: D	J		Waiver Status: HCB	Res Type: CRS	Day Type: IDN
	Note Date	Note Type	Location	Completed	Services Rendered		
	11/12/2010	TCM	Home	Complete	Assess/Reassess Needs Develop Plan		

The Summary Report is sorted by Case Management Supervisor, Case Manager and Consumer Name listing the case notes for each consumer meeting the filter criteria set (or will show all case notes if no filter criteria is set).
Case Managers will be able to easily limit the report to only the consumers on their caseload.
Case Management Supervisors will be able to view all of the case managers they supervise and their respective consumers.
Information is sorted newest to oldest.

Click Detail Summary Report Button [Detail Summary Report] to view Detail Summary report (this report includes note text as highlighted in yellow below)

Printed 1/3/2011 1:24:33 PM		Case - Notes Detail Summary Report					Page 1 of 1

Supervisor Name: Blaszko Michael

Case Manager Name: Schoolnick Jennifer (NR225)

DDS #: 24117		Consumer Name: BOONE RONALD			Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered		
	11/4/2010	General		Complete			
Notes: iuiuiuigggggugggggg							
	Note Date	Note Type	Location	Completed	Services Rendered		
	11/1/2010	General		Complete			
Notes: sdsds							
DDS #: 31739		Consumer Name: LANGEWAY BRIAN			Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered		
	11/15/2010	General		Complete	Assess/Reassess Needs		
Notes: blah blah kskskskksk							

Incomplete/Missing TCM Case Notes by Quarter

Choose Incomplete/Missing TCM Case Notes by Quarter which will tell you TCM eligible consumers that do not have a completed TCM case note.

If you have a consumer that you believe is TCM eligible BUT not showing up on the list there are seven possible reasons why (see next page for detailed list)

Click View Results and this is what you will see for your case load.

Highlighted date indicates that a TCM case note has been done but not completed.

Seven reasons why a consumer is not showing up on the TCM eligible list.

1. Eligibility Status of the consumer must be one of the ones considered 'Open Client', as indicated in the tCTEligStat table, field OpenCltAppFlag = 'C' .
   FYI, most of the status codes beginning with 'A' fit this criteria – AO, AI, etc, includes AX but does NOT include AF
2. Residence of the consumer must NOT be one of the following:
   a. COR
   b. HAB
   c. HOS
   d. ICF
   e. MH
   f. OR
   g. RC
   h. SCR
   i. SNF
   j. TRS
3. Residence of the consumer must NOT be marked as ICF/MR via the Program/Service Maintenance screens.
4. Age must be >= 3
5. Case Manager number must not indicate an Early Intervention CM (NR800-NR899, SR800-SR899, WR800-WR899)
6. Status 1 (StatusMedWaiver) for the consumer must NOT be one of the following:
   a. NDS   NOT IN WAIVER - FUNDED BY DSS
   b. K   CURRENTLY ENROLLED ON THE KATIE BECKET WAIVER.
7. There must be a TXIX benefit record for the client (that has eligible = 'Y' or eligible = 'P')

Example of Report

Printed 1/3/2011 1:47:37 PM			**InComplete TCM Case Notes By Quarter**					Page 1 of 2
Quarter Period: 1st - Quarter 2011								
Supervisor Name:		Blaszko Michael						
Case Manager Name:		Schoolnick Jennifer (NR225)						
DDS#	**Consumer Name**			**Waiver Status**	**TCM Eligible**	**Note Type**	**Case Note Date**	**Completed**
24	B	R		HCB	Y	TCM	01/03/2011	Incomplete
27	B	J		HCB	Y			
37	B	J		HCB	Y	TCM	01/03/2011	Incomplete
26	B	A		HCB	Y			
48	B	C		HCB	Y			
17	C	P		HCB	Y			
49	C	S		HCB	Y			
30	C	C		HCB	Y			
16	C	L		HCB	Y			
45	C	K		HCB	Y			
27	C	C		HCB	Y			
29	C	W		IFS	Y			
28	D	J		HCB	Y			
20	D	M		HCB	Y			

Highlighted are those notes that are marked TCM BUT not completed…
The report is sorted by Supervisor of Case Management, Case Manager and Consumer Name and is based on those consumers *currently* considered TCM Elligible for whom no TCM Case Note had been completed.

Supervisor of Case Management

Role is Case Management Supervisor

Supervisor Search

Supervisor Search Screen with limit to my case managers
For Helpline case managers and supervisors they will have to use case manager number or Consumer Search

User:Blaszko Michael, Role:Case Manager Supervisor

Case Manager Search

Case Manager #: [   ] [Ok]   Find My Case Managers: ☑ → Not checked by default

Last Name: [   ]   First Name: [   ] [Search]

Consumer Search

DDS #: [   ]

Limit to Active: ☑

Last Name: [   ]   FirstName: [   ]   [Search] [Create Note]

Case Manager List:

1 2

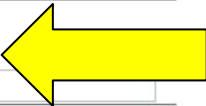| Case Mgr.#	Region	Last Name	MI	First Name	Phone #	Email
NR166	NR	Borella	K	Andrea	(860) 456-6367	Andrea.Borella@ct.gov
NR113	NR	Guerrin	L	Amy	(860) 263-2703	Amy.Guerrin@ct.gov
NR211 ← Click on Case Mgr # link to access case load					(860) 263-2638	Richard.Juergens@ct.gov
NR101	NR	Kowal	A	Lori	(860) 263-2696	Lori.Kowal@ct.gov
NR159	NR	Lyon	A	Debra	(860) 263-2662	Debra.Lyon@ct.gov
NR186	NR	Murphy		Kelly Ann	(860) 263-2648	Kelly.Ann.Murphy@ct.gov
NR204	NR	Oliminski		Susan	(860) 263-2606	Susan.Oliminski@ct.gov
NR225	NR	Schoolnick		Jennifer	(860) 263-2671	Jennifer.Schoolnick@ct.gov
NR176	NR	Taylor	J	Robert	(860) 630-4012	Robert.Taylor@ct.gov
NR194	NR	Valin		Virginia	(860) 263-2656	Virginia.Valin@ct.gov

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Supervisor of Case Management Summary Report View

1. Click Find My Case Managers
2. Complete Case Note Search filter criteria
3. Clicking View Results button will result in the display below

Case Note Summary Report and a detailed report would have the same content along with note text.

Printed 1/3/2011 2:11:19 PM	Case - Notes Summary Report				Page 1 of 1
	For Case Manager Case's Consumers				

Supervisor Name: Blaszko Michael

Case Manager Name: Borella Andrea (NR166)

DDS #: 29		Consumer Name: B	E	Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered	
	11/4/2010	TCM	Other	Complete	Develop Plan	

Case Manager Name: Juergens Richard (NR211)

DDS #: 40		Consumer Name: O	B	Waiver Status: N19	Res Type: IL	Day Type: IDV
	Note Date	Note Type	Location	Completed	Services Rendered	
	11/23/2010	TCM	Office	Complete	Referral/Coordination of Service	
	11/17/2010	TCM	Office	Complete	Monitoring/Follow-up	

Case Manager Name: Schoolnick Jennifer (NR225)

DDS #: 24		Consumer Name: B	R	Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered	
	11/3/2010	TCM	Office	Complete	Monitoring/Follow-up	
	11/1/2010	TCM	Home	Complete	Assess/Reassess Needs	
DDS #: 37		Consumer Name: B	J	Waiver Status: HCB	Res Type: CLA	Day Type: DSO
	Note Date	Note Type	Location	Completed	Services Rendered	
	11/2/2010	TCM	Office	Complete	Assess/Reassess Needs	
DDS #: 28		Consumer Name: D	J	Waiver Status: HCB	Res Type: CRS	Day Type: IDN
	Note Date	Note Type	Location	Completed	Services Rendered	
	11/12/2010	TCM	Home	Complete	Assess/Reassess Needs Develop Plan	

Case Manager Name: Wilhide Glenn (NR174)

DDS #: 48		Consumer Name: J	J	Waiver Status:	Res Type:	Day Type:
	Note Date	Note Type	Location	Completed	Services Rendered	
	11/8/2010	TCM	Home	Complete	Assess/Reassess Needs	

Supervisor of Case Management Incomplete/Missing TCM Case Notes by Quarter

If you just use the Find My Case Managers checkbox the resulting report will be sorted by Case Manager and show any TCM Eligible Consumers on their caseload for whom a TCM note has not been completed in the given quarter.

This manual was created by tim.deschenes-desmond@ct.gov and siobhan.morgan@ct.gov.Please contact if you have any specific questions about content.