

## Annual Recertification Process Checklist

### -Before Meeting:

- ☐ Set date, location and time to have Annual Care Team meeting with Member. Determine which providers the Member would like invited.
  - ☐ ( I find it best to state that I am going to invite providers to the meeting, but state that more often providers will only provide updates to how members' care has been--- This tends to make members feel more comfortable about the idea of having providers present.).
- ☐ Fax providers' invitations with date/time/location that is agreed on by the member for the Annual Care team meeting.
  - ☐ (Providers include but are not limited to Primary Care Provider, Social Supports, Mental Health Provider, HARP CM and HCBS provider if applicable.). Member
- ☐ Upload a copy of Provider invitation and any responses into documents tab in Netsmart.
- ☐ Upload new verification of diagnoses and make sure that all problems listed are in the problems list in Netsmart.
- ☐ Check members EPACES to ensure that Medicaid is active for the month. Either complete a Contact Note stating that EPACES was checked and the outcome, or upload EPACES report into Documents tab in Netsmart.

### -During Meeting:

- ☐ Complete Intake Assessment, Comprehensive Assessment, HIV Assessment, CAGE-AID, MMS, PAM assessments, and Social Determinants of Health tab in Netsmart.
  - ☐ (This is easier if you create a packet with all the assessments).
- ☐ Review Current Care Plan with Member and make transparent corrections/notes for new Person Centered Care Plan. **Ensure graduation/discharge target is identified in Plan of Care.**
- ☐ Review Rights and Responsibilities paperwork.
- ☐ Review/Update DOH 5055.
- ☐ Review any provider input that was given, if any. If providers are present, ask if they have anything to add that CHN can assist member with.
- ☐ \*\*\*\*IF HARP, make sure you get new HARP documents---DOH 5230, DOH 5032, and complete Annual Eligibility Assessment (or schedule this to be completed).
- ☐ Review Appropriateness Criteria Checklist and make determination that member should be in program or graduated.

### -After the meeting:

- ☐ Note in Netsmart for the Annual Recertification
- ☐ Create a Hallmark Event for Annual Care Team meeting/Recertification.
  - ☐ This can be the note copied into a Hallmark event.
- ☐ Upload all documents and input all assessments
- ☐ Update consents and demographics with any changes
- ☐ Update care plan within 30 days. When completing this, CHN should utilize the Assessments that were completed
  - ☐ (i.e. - if they identified a food insecurity, Medication Barrier or requested more information on Advance directives, CHN should include supports to address these. Leave Care Plan in draft until it can be reviewed with the member and they agree to what is written. Once they agree, finalize.
- ☐ Obtain signature on new Care Plan and scan into Netsmart.