VDC Case Management Checklist

# **Telephone outline Monthly**

[ ]  ADNA CM makes monthly telephone or VVC contact with Veteran

[ ]  Reviews Veterans status, current needs and assists with any issues

[ ]  Reviews if Veteran has been admitted for care outside of the home (Hospitalized, Rehab, etc.) and notifies Tempus. If Veterans admission for care outside of the home is expected to be longer than 14 days, the ADNA CM will notify Tempus to place the Veteran on suspension (Please review *As Needed* section below).

[ ]  Documents monthly contacts and sends copy of documentation to VDC Coordinator by end of the month.

# **Work from home house outline Quarterly**

[ ]  ADNA CM reconciles Veterans spending on the *Monthly Veteran Services Report* (attached to Veterans spending plan) using the *Monthly Service Spreadsheet* from Tempus

[ ]  ADNA CM meets with Veteran/AR for quarterly in home visit

[ ]  Reviews Veterans status, current needs, assists with any issues, and confirms dates if Veteran was admitted for out of home care,

[ ]  Reviews Veterans spending plan and budget

[ ]  Reviews employee(s) planned leave or use of emergency back-up funds

[ ]  Documents face to face contact and sends copy of documentation to VDC Coordinator by end of the month

# **Contract outline Annually**

[ ]  30-60 days before the Veterans spending plan expires (Sept./Oct.) the ADNA CM coordinates with Veteran for annual review and reauthorization

[ ]  ADNA CM reconciles Veterans spending on the *Monthly Veteran Services Report* to review budget usage with Veteran and plan for next fiscal year

[ ]  Reviews draft spending plan and budget for new fiscal year

[ ]  Annual assessment of the Veteran’s ability to manage the VDC program, review of the emergency back-up plan, and review the roles and responsibilities of the Veteran/AR, employees and ADNA case manager on the [*VDC Veteran Tasks Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/)

[ ]  Submits signed spending plan to VDC Coordinator a **minimum of two weeks before current plan expires**

☐ Documents contact and sends copy of documentation with the updated [*VDC Veteran Tasks Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/) to VDC Coordinator by end of the month

# **Clipboard outline As Needed**

* **Veteran/ AR contacts ADNA CM for assistance with payroll concern or question:**  ADNA CM contacts Tempus (VDC@tempusunlimited.org) and coordinates resolution
* **Veteran/AR contacts ADNA CM to notify if emergency back-up care or OT needed:** ADNA CM reviews reason for additional hours and alignment with emergency back-up plan/budget. ADNA CM must coordinate with Tempus (VDC@tempusunlimited.org) to use emergency back-up budget for any additional care hours or OT before Veteran/AR submits payroll or Tempus will not authorize payment. For further details see [*Emergency Backup Budget Process*](https://tempusunlimited.org/ma-veterans-directed-care-program/).
* **Veteran/AR contacts ADNA CM if spending plan amendment needed for change of employee:** ADNA CM will assist with onboarding new employee/s(see assessment checklist for new employee process). Once the background check is completed, ADNA CM will update the Veteran’s spending plan and emergency back-up plan section of the [*VDC Veteran Tasks Agreement*](https://tempusunlimited.org/ma-veterans-directed-care-program/)(if needed) and submit to VDC Coordinator for approval.
* **Veteran/AR contacts ADNA CM requesting additional hours/increased budget:** ADNA CM reviews reason for request and drafts proposed spending plan changes. Submits to VDC Coordinator to review for budget increase. VDC Coordinator will contact the Veteran to review if there has been a medical status change necessitating increased care needs. VDC Coordinator will update the draft spending plan and send to ADNA CM to review and finalize with Veteran/AR.
* **Veteran/ AR notifies ADNA CM that Veteran has been hospitalized:**  ADNA CM notifies Tempus of dates the Veteran was hospitalized. If the Veteran’s employee provides care on the day of admission and/or the day of discharge from a facility, they can be paid for those hours but employees can not submit payroll for care of the Veteran while the Veteran is at a facility (hospital, rehab, nursing home, etc.). If Veteran will be hospitalized over 14 days, ADNA CM notifies Tempus to suspend the Veteran. Once Veteran is discharged home, ADNA CM needs to notify Tempus to remove the suspension. All ADNA Contact to Tempus should be thru VDC@tempusunlimited.org.
* **Veteran/AR contacts ADNA CM requesting Goods & Services:** ADNA confirms if the Veteran/AR has requested the goods or services thru their VA PCP. If not, ADNA CM directs the Veteran/AR to first discuss with the VA PACT team as any goods or services that the VA provides cannot be purchased thru the VDC budget. Once this is done, the ADNA CM assists the Veteran/AR complete the [*VDC Goods and Services Worksheet*](https://tempusunlimited.org/ma-veterans-directed-care-program/) and submits the completed form with a current reconciled *Monthly Veteran Services Report* to the VDC Coordinator via encrypted email for consideration by the VISN VDC Council.
* **Veteran/AR contacts ADNA CM requesting Adult Day Health Care (ADHC):** Veteran identifies an ADHC and obtains:
* The ADHC contact information
* The ADHC W-9
* The cost per day with transportation fee if needed

Veteran/AR reviews budget and spending plan with ADNA CM to determine if the Veteran has sufficient budget to add ADHC or if they need to reallocate spending to accommodate the addition of ADHC. Veteran and ADNA CM draft an amended spending plan adding the annual cost for ADHC under Emergency Back-up Care and submits to VDC Coordinator for approval. ADNA CM completes the [*VDC Payment Request Form*](https://tempusunlimited.org/ma-veterans-directed-care-program/)with Vendor information and the W-9 obtained from Veteran/AR, then submits to Tempus with the approved spending plan. Once Vendor has been added by Tempus, Vendor can submit monthly invoices to the ADNA CM and ADNA CM submits to Tempus via VDC@tempusunlimited.org with a completed *VDC Payment Request Form* by the 7th of each month. ADNA CM reviews ADHC usage and budget ongoing with Veteran/AR during monthly contacts.

* **ADNA CM unable to make monthly contact with Veteran/AR:** ADNA CM documents contact attempts and submits documentation to the VDC Coordinator by the end of the month. VDC Coordinator will follow up with ADNA CM to review and assist with communication if needed.

\*Tempus forms and PaperWorkr [link](https://tempusunlimited.org/ma-veterans-directed-care-program/)