

Massachusetts Department of Public Health

Medical Case Management

January 2021



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Introductions

- Emily Levine, Service Quality Coordinator, (Massachusetts Department of Public Health)
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Topics Covered In This Webinar

- Medical Case Management Data Requirements
- Entering Data
 - Acuity Scores
 - Referrals and Linkages
 - Custom Fields
 - Clinical Data
- Quality Assurance Reports Available
- Case Scenarios
- Contract Manager Data Review
- Support and Resources

MEDICAL CASE MANAGEMENT DATA REQUIREMENTS



MCM Data Requirements

- For medical case management clients, enter:
 - Acuity scores
 - Referral and linkage to medical care information
 - STI, Hepatitis, TB screenings
 - CD4/Viral Load
 - Care Access Client
- Subservice units are either:
 - Activities (e.g., assessment, linkage, referrals): enter “1” unit when completed
 - Encounters, visits, communication: enter “1” unit for each 15 minute increment



Types of subservice units

1. Activities (e.g., assessment, linkage, referrals): enter “1” unit when completed
2. Encounters, visits, communication: enter “1” unit for each 15 minute increment
3. Transportation and meals: depends on sub-service

MCM: “1” unit each for...

- Intake/initial assessment
- Initial acuity assessment
- MCM acuity reassessment
- ISP/Care Plan
- Care Access acuity reassessment
- Referrals (non-medical)
- Linkage to medical care
- Linkage to health insurance
- HDAP linkage and recertification
- Referrals to Partner Services
- Post-release linkage to care

MCM: “1” unit per 15 mins for...

All MCM providers:

- Communication with medical provider
- Communication with non-medical provider
- Face-to-face session
- Client communication (not face-to-face)

Specific providers only:

- Adherence support (face-to-face)
- Adherence support (not face-to-face)
- Adherence support (medical provider)

MCM-specific fields

- Acuity scores, referrals, and linkage to medical care
 - Fields 36-43
- CD4/Viral Load, STI, Hepatitis C, Pap Smear, and TB screening
 - Fields 71-81

ENTERING DATA – ACUITY SCORES



Acuity Scores

For the “MCM initial acuity assessment,” “MCM acuity reassessment,” and “Care Access acuity assessment” subservices, fill in the scores for each section of the acuity tool.

- HIV Care Adherence
- Current HIV Health Status
- Other Non-HIV Related Medical Issues
- HIV Medication Adherence
- Health Insurance and HDAP Status
- Sexual and Reproductive Health Status
- Current Mental Health Status
- Current Substance Use
- Current Housing Status
- Current Legal Status
- Support System and Relationships
- Current Income/Personal Finance Management Status
- Current Transportation/Mobility Status
- Current Nutritional Status
- Total Score

Acuity Scores


- The “Total Score” is the sum of all sections.
- Only numeric data should be entered for these fields


Find Client > Search Results > Demographics > Services > Add Service

[Next](#) [Back](#)

Add

Client:

Date: 

Service Name: 

Acuity Scores

Save Back

Next

Client:

Date: 

Service Name:

Contract: 

Units:

Price: \$

Total: \$

Acuity Score: HIV Care Adherence:

Acuity Score: Current HIV Health Status:

Acuity Score: Other Non-HIV Related Medical Issues:

Acuity Score: HIV Medication Adherence:

Acuity Score: Health Insurance and HDAP Status:

Acuity Score: Sexual/Reproductive Health Status:

Acuity Score: Current Mental Health Status:

Acuity Score: Current Substance Use:

Acuity Score: Current Housing Status:

Acuity Score: Current Legal Status:

Acuity Score: Support System and Relationships:

Acuity Score: Current Income/Personal Fin.Mgt.Stat.:

Acuity Score: Current Transp./Mobility Status:

Acuity Score: Current Nutritional Status:

Total Acuity Score:

Level of Acuity: 

Acuity Level

- **Acuity Level:** Select the level of acuity: basic (1-14), moderate (15-28), high (29-42).

Level of Acuity:

Basic (1-14)
Moderate (15-28)
High (29-42)

ENTERING DATA – REFERRALS AND LINKAGES

MCM Referrals

Subservice MCM Referrals (Non-medical) only:

- Enter date the referral was initiated.
- Select the **Referral type**:
 - Substance abuse
 - Mental health
 - Housing
 - Financial/benefits
 - Legal
 - Transportation
 - Peer support services
 - Food/nutrition support services
 - Other
- Select the **Referral status** (open, closed, lost to follow-up – 60 days).
- Enter date the referral was **confirmed** (can be later), and close the referral status.


MCM Referrals


Subservice MCM Referrals (Non-medical) only:

Next Back

Add

Client:


Date: 

Service Name: 


Save Back

Next

Client:

Date: 


Service Name:


Contract: 


Units:

Price: \$

Total: \$

Referral Types: 

Status of Referral: 

Confirmation of Referral Date: 

MCM Linkage to Medical Care

Subservice MCM Linkage to Medical Care only:

- Enter **date** the linkage was initiated.
- Select the **Linkage type**:
 - HIV
 - HCV
 - STI screening
 - Non-HIV related
- Select the **Linkage status** (open, closed, lost to follow-up – 60 days).
- Enter date the linkage was **confirmed** (can be later), and close the linkage status.

MCM Linkage to Medical Care

Subservice MCM Linkage to Medical Care only:

[Next](#) [Back](#)

Add

Client:

Date: 


[Save](#) [Back](#)

Next

Client:

Date: 


Service Name:


Contract: 


Units:

Price: \$

Total: \$

Linkage Type: 

Linkage Status: 

Confirmation of Linkage Date: 

ENTERING DATA – CUSTOM FIELDS

Care Access Client

- Care Access Checkbox
 - This field is required
 - Check the box if the client is a Care Access client.

Care Access Client:

Optional Custom Fields

- Date Closed Out of MCM Services
 - This field is optional.
 - Select the date closed out of MCM Services.
- Next Acuity Assessment
 - This field is optional.
 - Select the date of the next acuity assessment

Date Closed Out of MCM Services:



Next Acuity Assessment:



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ENTERING DATA – CLINICAL DATA

- Customize
- Demographics
- Client Report
- Encounter Report
- Services
- Annual Review
- Case Notes
- Custom Forms
- Vital Signs
- Hospital Admissions
- Medications
- Labs**
- Screenings
- Screening Labs
- Immunizations
- Diagnoses
- Sharing Requests
- Referrals
- Relations
- Counseling and Testing
- Pregnancy History
- Orders
- Appointments
- User Messages
- Search Change Details
- Duplicate Client
- Performance Measure
- Status
- External Links
- Close


Clinical Data


- Clinical data is required for MCM-funded agencies
- Individual sections for:
 - Labs
 - Screenings
 - Screening Labs


Labs

- Date
- Lab
 - CD4 Count
 - Viral Load
- Test Operator
- Test Result (numeric)

Add

Date: 

Lab: 

Test Operator: 

Test Result: (cells/mm³)

Comment:





Screening Labs


- Date
- Test Definition
 - Chlamydia
 - Gonorrhea
 - HCV(RNA)
 - Hepatitis C antibody
 - IGRA
 - Syphilis
- Result
 - Indeterminate
 - Negative
 - NMI
 - Positive
 - Presumptive
 - Unknown


Save Back

Add

Test Date: 

Test Definition: 

Result: 

Treatment: 

Titer 1:

Test Comments:





Screenings


- Date
- Test Definition:
 - Rectal Pap Smear
 - TB Chest Radiograph
 - TST
- Result
 - Indeterminate
 - Negative
 - Positive
 - Presumptive
 - Unknown

Save Back

Add

Test Date: 

Test Definition: 

Result: 

Test Score:

Test Comments:



QUALITY ASSURANCE REPORTS

QA Reports for MCM

- Missing data reports:
 - Missing Acuity Reassessment in 6 months (No service in X days)
 - No CD4/viral load in the past 6 months (Clinical Encounter)
- Financial Report
- RSR Validation Report
- Other custom reports:
 - Client List
 - Service Detail Report
 - Care Access Client List
 - Referral Completions Client List
 - Changes in Acuity Client List
 - MCM Last Acuity Reassessment and Referral Information
 - Viral Suppression Client List

CASE SCENARIOS

Case Scenario 1: A day with A

- MCM spent the morning completing A's acuity reassessment
- 9:30-10:00 am: call with A's nurse
 - HDAP application has not been sent to MCM. Signature and labs still needed.
 - Confirmation of appointment to her new social worker from referral a week ago
- 10:50 am: A's completed HDAP application is faxed over
- 10:00 am: A comes in for her appointment
 - HDAP application: signed by A
 - Discuss and complete ISP
 - Discuss any barriers to transportation for SW appointment for next week. A requests a ride to and from the appointment for tomorrow.
- 2:00 pm: call to set up cab ride for A for tomorrow
- 2:30-2:45pm: call to A to confirm ride
 - A asks about rental assistance application.
- 3:00-3:15 pm: complete and emailed rental assistance application
 - Call to rental assistance program to confirm email. Discussed options and corrected note on application.

A day with A: data reporting

Service Name	Units
MCM Acuity Reassessment	1 unit (complete) Note: Make sure to fill in the Acuity Scores for different areas as well as the Total Acuity and Level of Acuity.
MCM Communication with medical provider	2 units (30 minutes) Note: Make sure to go back and enter the date for last week's Referrals (non-medical): Mental Health
MCM In-person session	6 units (1.5 hours)
MCM ISP/Care Plan	1 unit (complete)
MCM HDAP linkage and recertification	1 unit
Taxi/Transportation	2 unit (round trip)
MCM Referrals (non-medical):	1 unit Note: Choose "Housing" in the drop down menu.
MCM Communication with non-medical provider	1 unit (15 minutes)

A day with A in CAREWare

Find Client > Search Results > Demographics > Services

[View](#) [Add](#) [Delete](#) [Receipts](#) [Help](#) [Print or Export](#)

Services

Search:

Date	Subservice	Contract	Units
01/21/2021	MT Taxi/Transportation	July 1, 2020 - June 30, 2021 (Part B)	2
01/21/2021	MCM Referrals (non medical)	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM ISP/Care Plan	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM In-Person session	July 1, 2020 - June 30, 2021 (Part B)	6
01/21/2021	MCM HDAP linkage and recertification	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM Communication with non-medical provider	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM Communication with medical Provider	July 1, 2020 - June 30, 2021 (Part B)	2
01/21/2021	MCM Acuity Reassessment	July 1, 2020 - June 30, 2021 (Part B)	1

Case Scenario 2: a new client T

Monday morning: new client, T arrives for his appointment

- 9:00-11:00am: meet with T
 - Complete the intake
 - Sign consents and program agreements
 - Complete the ISP
 - Note he has not yet found an ID specialist and will need to get connected to a doctor
- 1:00pm: create file for T
 - Complete progress notes
 - Complete acuity assessment

Tuesday

- 10:00-10:30am: Call local ID clinic to make an appointment for T
- 11:30-45am: call T with appointment time. T requests a ride.
- 1:00pm: call cab company to make ride reservation for Thursday

Friday

- 2:00-45pm: call to T to see how the appointment went
- 3:00-15pm: call with nurse to discuss questions T has about his medication

A week with T: data reporting

Service Name	Units
MCM Intake/initial assessment:	1 unit (complete)
MCM Initial Acuity Assessment:	1 unit (complete)
MCM ISP/Care Plan:	1 unit (complete)
MCM Communication with medical provider:	2 units (30 minutes)
MCM In-person session:	8 units (2 hours)
Taxi/Transportation:	2 units (round trip)
MCM Linkage to medical care:	1 unit Note: Choose “HIV” in the drop down menu Note the date the appointment happened
MCM Communication with medical provider:	1 unit (15 minutes)
MCM Client communication (not in-person):	3 units (45 minutes)

A day with T in CAREWare

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Services](#)

[View](#) [Add](#) [Delete](#) [Receipts](#) [Help](#) [Print or Export](#)

Services

Search:

Date	Subservice	Contract	Units
01/21/2021	MCM Client communication (not in-person)	July 1, 2020 - June 30, 2021 (Part B)	3
01/21/2021	MCM Commnication with medical Provider	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM Commnication with medical Provider	July 1, 2020 - June 30, 2021 (Part B)	2
01/21/2021	MCM Initial acuity asesment	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM In-Person session	July 1, 2020 - June 30, 2021 (Part B)	8
01/21/2021	MCM Intake/Initial Assessemnt	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM ISP/Care Plan	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MCM Linkage to medical care	July 1, 2020 - June 30, 2021 (Part B)	1
01/21/2021	MT Taxi/Transportation	July 1, 2020 - June 30, 2021 (Part B)	2

CONTRACT MANAGER DATA REVIEW



Contract Manager Data Review

<i>Description</i>	<i>Count</i>
Total Number of Clients	52
Total Number of Newly Enrolled Clients	2
Total Number of Care Access Clients	13

<i>Service Category</i>	<i>No of clients</i>	<i>Total Units</i>
Medical Case Management	52	290

<i>Service Category</i>	<i>Subservice</i>	<i>No of clients</i>	<i>Total Units</i>
Medical Case Management	MCM Acuity Reassessment	25	25
	MCM Client communication (not in-person)	30	79
	MCM Communication with medical provider	3	3
	MCM Communication with non-medical provider	17	22
	MCM HDAP linkage and recertification	23	28
	MCM ISP/Care Plan	23	23
	MCM In-person session	28	81
	MCM Initial acuity assessment	1	1
	MCM Linkage to health insurance	9	14
	MCM Linkage to medical care	1	1
	MCM Referrals (non medical)	5	8
	MCM Telehealth session	4	5



QA is everyone's responsibility

- What data are your contract managers reviewing?
- What will they ask you about?
- What tools can you use to address data quality?

CAREWare MA SUPPORT & RESOURCES



CAREWare MA Documentation

- Subservice Definitions
- Fields and Definitions
- Report Instructions

Fields and Definitions

June 2020 v2.1

Yellow highlights indicate changes since the last version.



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This document describes the fields available in the Massachusetts state CAREWare system. For more details on the field definitions used by the HIV/AIDS Bureau for the Ryan White HIV/AIDS Program (RWHAP), see the most recent Annual Ryan White HIV/AIDS Program Services Report Instruction Manual, available at: <https://careactarget.org/library/ryan-white-hiv-aids-program-services-report-rsr-instruction-manual>.

TABLE OF CONTENTS

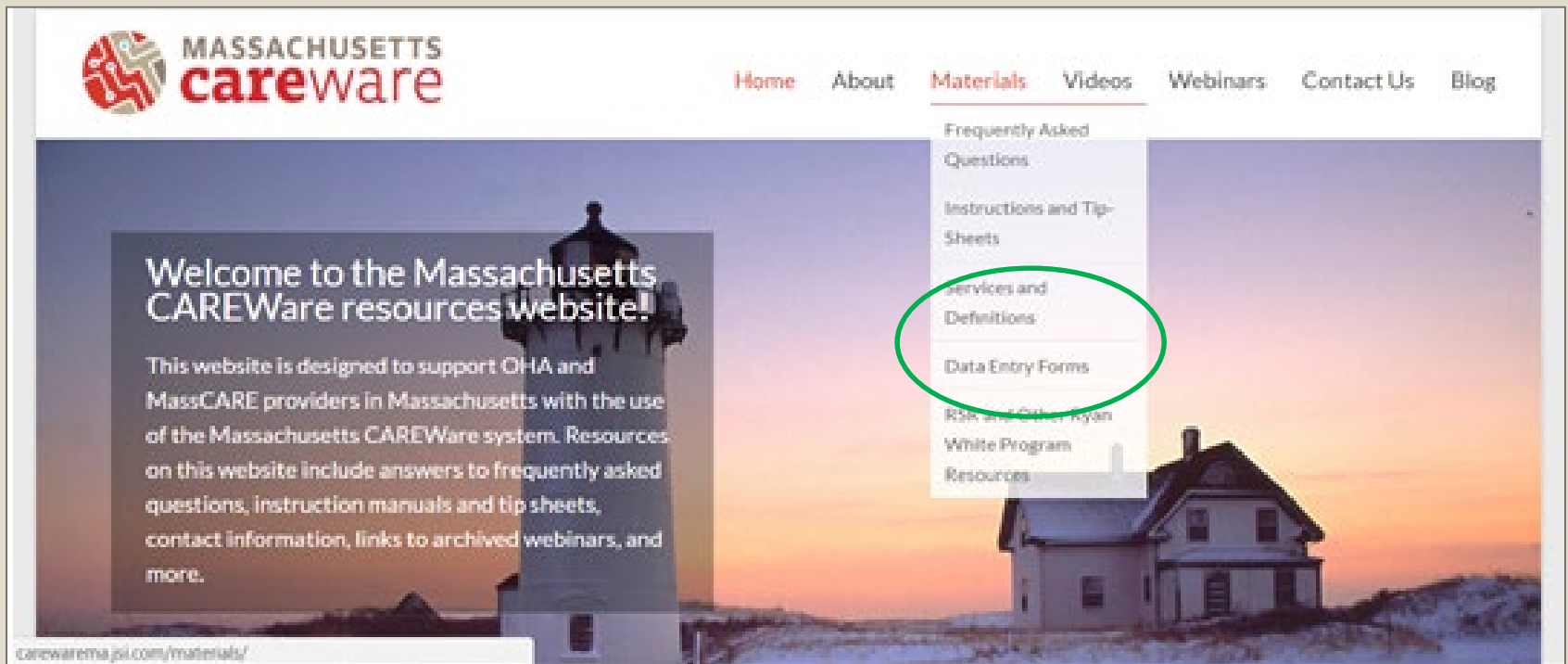
CLIENT IDENTIFIERS.....	4
Field 1 First Name	4
Field 2 Middle Name.....	4
Field 3 Last Name	4
Field 4 Gender	4



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CAREWare MA Website

Find materials and other resources at <http://carewarema.jsi.com/> under “Materials.”



The screenshot displays the homepage of the Massachusetts CAREWare website. The header features the logo on the left and a navigation menu on the right with items: Home, About, Materials, Videos, Webinars, Contact Us, and Blog. The 'Materials' menu is expanded, showing a list of resources: Frequently Asked Questions, Instructions and Tip-Sheets, Services and Definitions (circled in green), Data Entry Forms, Role and Scope of a Ryan White Program, and Resources. A large banner on the left contains a welcome message and a description of the website's purpose. The background image shows a lighthouse and a house at sunset.

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Home About **Materials** Videos Webinars Contact Us Blog

Frequently Asked Questions
Instructions and Tip-Sheets
Services and Definitions
Data Entry Forms
Role and Scope of a Ryan White Program
Resources

Welcome to the Massachusetts CAREWare resources website!

This website is designed to support OHA and MassCARE providers in Massachusetts with the use of the Massachusetts CAREWare system. Resources on this website include answers to frequently asked questions, instruction manuals and tip sheets, contact information, links to archived webinars, and more.

carewarema.jsi.com/materials/

CAREWare MA Helpdesk Support

- Go to www.CAREWareMA.jsi.com
- Email CAREWareMAhelpdesk@jsi.com
- Call 617-385-3991
- Fax 617-482-0617

THANK YOU!

