



## Community Well County Case Manager (CCM) Checklist

---

### New Enrollment

- ☐ Assign CCM within 10 days
- ☐ Mail Initial Notification of CCM Role Letter within 10 days
- ☐ Assign Care Coordinator in MnCHOICES
- ☐ Document assignment in care plan

### Health Risk Assessment (HRA) Outreach

- ☐ Minnesota Senior Care Plus (MSC+)/ Special Needs BasicCare (SNBC): Attempt 1
- ☐ MSC+/SNBC: Attempt 2 if needed
- ☐ PrimeWest Senior Health Complete (PWSHC)/Prime Health Complete (PHC): Attempts 1 – 3 by phone
- ☐ PWSHC/PHC: Unresponsive Member Letter for Attempt 4

### Assessment

- ☐ Complete MnCHOICES HRA within 30 days or transitional Health Risk Assessment (THRA) for members with a MnCHOICES Assessment or MnCHOICES HRA within the last 365 days; if using a THRA, follow the THRA checklist for guidance
- ☐ Identify health risks
- ☐ Identify behavioral health needs
- ☐ Establish member goals
- ☐ Establish follow-up frequency, at minimum, every 6 months

### Support Plan

- ☐ Complete within 30 days of assessment
- ☐ Document strengths and S.M.A.R.T (Specific, Measurable, Achievable, Relevant, Timely) goals
- ☐ Document emergency plan
- ☐ Send plan to member/primary care provider for signature within 6 months of the assessment

### Annual Requirements

- ☐ Annual HRA within 365 days
- ☐ Annual reassessment
- ☐ Review Interdisciplinary Care Team (ICT)
- ☐ Update support plan

### Transition of Care

- ☐ Respond within 3 business days
- ☐ Offer medication reconciliation
- ☐ Notify ICT
- ☐ Document transition