Care Navigator System Functionality Changes Effective March 13, 2020

We have recently made significant changes in the Care Navigator system to support the new Care Coordination Payment Model effective April 1, 2020. We have created a technical overview module and a written guidance document to support the changes in Care Navigator. Please note that this demonstration is being done in our staging environment and may look different than the production environment.

System Enhancements/Changes:

1. Patient Header now reflects Last Encounter Date & Reason for Engagement
2. Encounter Log displays Date of Last Encounter
3. Care Team Conference
4. Reason for Engagement replaced Revised CC Level Section removed
5. Social Determinants of Health
6. Care Team – New Types of Participation (Organizational Admin, Care Team Member, Non-ACO)
7. Adding Non ACO Participant- participants on the Care Team but will not have access to system (school nurse, DCF, etc.)
8. Care Team Licensure now visible in care team grid
9. Lead CC Tracking Changes
10. Bulk Deactivation
11. Notification to Care team members upon removal from care team with reason for removal date, name

1. **Patient Home Page:** Last Encounter date & reason for engagement now show
2. **Encounter Log**: Now shows Date of Last Encounter

**Encounter Log**

- Date of Last Encounter: 3/10/2020 11:31 AM

3. **Adding Care Conferences**: Add a Care Conference under Care Conference tab

**Care Team Conference**

- 1. Click + to add a Care Team Conference
**Gail Matthews's Care Team Conference**

### Visit Summary
- **Visit Type**: Care Team Conference

### General
- **Patient/Family Involved**: No
- **Patient/Family Attending**: No
- **Reason/Not Attending**: Transportation

### Attendees
- **Care Team Member**:

### Encounter Purpose
- **Shared Care Plan Review/Update**: ✔
- **Assessment/Physical**: □
- **Assessment/Mental Health**: □
- **Assessment/Social**: □
- **Goal Setting**: □

### Encounter Notes
- [Note to Understanding]

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2. Populate each section that has an *

4. Type your note, such as next steps and information the care team needs to know. Not for lengthy progress

3. Choose an Encounter Purpose. Multiple selections may be made.

5. Click Save
6. Click on grid to add Care Team Attendees

7. Click Add Attendees to add Care Team Attendees
8. Choose Care Team Attendees that attended Care Team Conference

9. Click submit

10. Click ok to close

11. Click on patient’s name to go back to care team conference page
4. **Reason for Engagement**: Indicate the Reason for Engagement. This field has replaced the Revised Care Coordination option

12. Right click and refresh the list of Care Team Members who attended

13. Mark Status Completed

14. Click save button

15. Click the X in the top right hand corner to return to the main patient screen
5. **Social Determinants of Health Social Risk Score**: non editable field now appears

6. **New Care Team Member Options**: Role and Participation Type are now required fields. You will need to indicate your relationship to the patient in this section. Participation Type is also a required field. You will need to choose from ACO Admin – for people who are doing administrative work on the care team. This role does not generate payment. Care Team member – these are individuals on the care team providing care coordination services. This role does generate payment.
Patient Details
Care Team Notifications
Event Notifications
Encounter Log
Care Team Conference
Care Coordination

1. Click once on the Care Coordination option from the patient’s page

2. Scroll down to locate the Care Team Members section
### OneCare Vermont

#### Active Connections for Patient

<table>
<thead>
<tr>
<th>Name</th>
<th>Role/Title</th>
<th>Participation Type</th>
<th>License 1 (Name)</th>
<th>License 2 (Name)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Danielle Palmer</td>
<td>Care Coordinator</td>
<td>Yes</td>
<td>Care Team Member</td>
<td>RN</td>
<td>Age Well Care and Service Coordinator</td>
</tr>
<tr>
<td>Elizabeth Roach</td>
<td>Care Coordinator</td>
<td>No</td>
<td>Organizational Adm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Erin Covey</td>
<td>Panel Coordinator</td>
<td>No</td>
<td>Care Team Member</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kathleen Camisa</td>
<td>Care Coordinator</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 - 4 of 1

**3. Click on the grid to begin the Care Team Member add**

**4. Click on Add Care Team Member**
7. **Non-ACO Participants**: You can add non-ACO care team members to the patients care team. Note these care team members won’t have access to Care Navigator but should be noted as part of the care team.
1. Click once on the Care Coordination option from the patient’s page

2. Scroll down to locate the Care Team Members section
3. Click on the grid to begin the Care Team Member add.

4. Click on Add Care Team Member.

5. Enter Users name. If unable to find click on look up more records.
6. Click New to add new non-ACO Participant
7. Enter First Name & Last name, Job title & Description
8. If applicable add Licensure
9. Add contact details if you have them (optional)
10. Click Done
11. Click Save & Close to return to the care team member grid
12. Add the Role
13. Add the non-ACO member’s organization
8. **Care Team Member Licensure**: now visible in Care Team Grid

<table>
<thead>
<tr>
<th>Name</th>
<th>Role (To)</th>
<th>Lead CC</th>
<th>Participation Type</th>
<th>Licensure 1 (Name)</th>
<th>Licensure 2 (Name)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Danielle Palmer</td>
<td>Care Coordinator</td>
<td>No</td>
<td>Care Team Member</td>
<td>RN</td>
<td>Anne Well Care and Service Coordinator</td>
<td></td>
</tr>
<tr>
<td>Elizabeth Roach</td>
<td>Care Coordinator</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Erin Covey</td>
<td>Care Manager</td>
<td>Yes</td>
<td>Care Team Member</td>
<td>RN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kathleen Canisa</td>
<td>Care Coordinator</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Licensure now visible]

9. **Lead CC Tracking Changes**: When making changes to the LCC you will now need to indicate a reason why

Locate the Care Team Members table under the Care Coordination Tab

<table>
<thead>
<tr>
<th>Name</th>
<th>Role (To)</th>
<th>Lead CC</th>
<th>Participation Type</th>
<th>Licensure 1 (Name)</th>
<th>Licensure 2 (Name)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dan CCS10</td>
<td>Grandparent</td>
<td>No</td>
<td>Care Team Member</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dan CCS9</td>
<td>Grandparent</td>
<td>No</td>
<td>Non-ACO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Danielle Palmer</td>
<td>Care Coordinator</td>
<td>No</td>
<td>Care Team Member</td>
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<tr>
<td>Elizabeth Roach</td>
<td>Care Coordinator</td>
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</tr>
</tbody>
</table>

1. Open team member you want to make LCC
2. Click Lead CC box

3. Click ok
You can now see Lead CC Change History.

5. Click Save & Close

4. Choose Reason for Lead CC Change
10. **Bulk Deactivation**: You can now deactivate multiple patients from your panel

Hover over the Care Navigator Tile in the top black bar and choose the Care Provider Tile:

1. Click on Care Provider

Search for the Care Provider using the search bar and double click in-between the text on the blue line to open the record:

2. Search for Care Provider

A list of patients the Care Provider is assigned to will appear in a list view. To do a Bulk Deactivation ensure the Care Provider field is set to Care Provider: Bulk Care Team Deactivate

3. Put a check mark next to each patient to deactivate

Click in each box to place a check mark next to each patient that you wish to deactivate the Care Provider from and select Deactivate and then click Bulk Care Team Removal:
A Dialogue Box will appear asking you to enter a Reason for Removal. Once entered click OK to start the deactivation process of the selected records. The Care Provider will be notified by email that they have been deactivated from the Care Team(s).

4. When dialogue box appears enter reason for removal and click OK
Sample Notification: Care Team Notification is sent upon removal from care teams:

********** This is an automated email. Please do not reply to this email. **********

Dear Elizabeth Roach,

This notification is being sent to let you know that you have been removed from one or more care teams you were actively working with in Care Navigator™. You can find out more information about this activity by logging into Care Navigator™ and reviewing the notification(s) in your Notification Inbox on the My Work dashboard.

Technical Support:

If you have any questions about the application, have trouble logging in, or experience any technical issue, please contact OneCare Vermont Operations Help Desk at HelpDesk@OneCareVT.org or 802-847-7220 for assistance.

Thank You,

The Team at OneCare Vermont and Care Navigator™