

Procedure for Closing Cases

Procedures for closing a participant's case when participant **successfully** completes CCMP:

1. AM receives alert that the estimated completion date is in 45 days.
2. AM reviews and addresses any open non-compliance events.
3. AM sends CCMP completion summary to Christiana Care Employee Relations 30-40 days prior to estimated completion date.
4. The AM tasks the Administrative Case Coordinator (ACC) to schedule a final toxicology test between a week and 10 days prior to planned completion date.
5. AM reviews test result. If negative, proceed with completion. If positive, report noncompliance to employee relations and do not continue with the completion process.
6. AM schedules and completes a final call with the participant and asks about the participant's relapse prevention plan; this is documented in a task
7. AM completes the following steps the day before or the day of participants completion:
 - a. Opens intake screen and enters date under Actual Program Completion
 - i. *Actual Program Completion dates should not be back-dated.*
 - b. Under HPMP Monitoring Requirements, pulls up current monitoring agreement and changes the End Date to date of program completion.
 - c. Under HPMP Meeting due tab: Excuse any open FUTURE Meeting Due Records by changing the status from "unknown" to "requirement waived"
 - d. Verify that there are no open non-compliance event records.
 - e. Writes and sends discharge (completion) letters to: participant, Employee Relations and Employee Health.
8. AM Tasks ACC to review and inactivate case and to **excuse any future toxicology records that are open.**

Procedure for closing a participant's case when participant **does not** successfully complete CCMP:

1. Documentation is received from CCMP stating the date and the reason for termination from the program
2. AM completes the following steps:
 - a. Under HPMP Intake, enters date under Program Termination and reason under Program Termination Reason (*Termination date should not be back-dated. The Termination date will be the date that Uprise Health received notification.*)
 - b. Under HPMP Monitoring Requirements, pulls up current monitoring agreement and changes the End Date to date of program termination.
 - c. Under HPMP Meeting due tab: Excuse any open FUTURE Meeting Due Records by changing the status from "unknown" to "requirement waived." Any open PAST meeting due records should have status changed from "unknown" to "requirement NOT met."
 - d. Review all open noncompliance event records and update fields as indicated
 - e. Writes and sends program termination letter to participant, Employee Relations and Employee Health.

- f. Tasks Assistant CC to close/inactivate case and to **excuse any future toxicology records that are open.**

Procedure for **suspending** a participant's participation in CCMP:

1. Uprise Health Monitoring determines that participant's participation in monitoring should be suspended
 - a. Example: Participant has been referred back to treatment and Christiana Care requests that Uprise Health place participants record on "hold."
2. AM completes the following steps on the day the participant's suspension starts:
 - a. Under Intake, enters date under Suspension Start Date and reason under Suspension Reason
 - b. Under Monitoring Requirements, pulls up current monitoring agreement and puts a zero for number of tests between start and stop dates.
 - c. Under current monitoring agreement, checks, "Suppress Meeting Due Record Generation" box on all open requirements.
 - d. Tasks Assistant CC that licensee is suspended from monitoring and **asks Assistant CC to excuse any future toxicology records that are open.**
3. **If a participant's case is suspended for only part of the month, then Christiana Care will be billed. If the participant is suspended for the ENTIRE month, then Christiana Care will not be billed.**

Important Information

1. **DO NOT check the "customer is inactive" box on the first page of the participant's case.** The Assistant Case Coordinator will check the inactive box as part of the closing process completed by the ACC.
2. **Do NOT close a case until all toxicology tests have been resulted.**