

# ST. JOHN PROVIDENCE PHYSICIAN NETWORK

## Care Manager Orientation Checklist

<b>Name of Associate:</b>	<b>Social Security # (last four digits):</b>	<b>Department Name:</b> SJPPN, Quality
<b>Job Classification (TITLE):</b> Complex Care Coordinator	<b>Date of Hire/Transfer:</b>	<b>Department #:</b> 34028/59901

	ASSESSMENT			ACTION PLAN		EVALUATION SUMMARY	
	<p><u>DIRECTIONS:</u> For each procedure listed, answer the question indicated. This should be done as a combined effort between manager and associate. Competence means "able to perform the procedure safely, correctly, effectively and legally."</p>			<p><u>DIRECTIONS:</u> Based upon the self-assessment, the following plan is indicated.</p>		<p>This is to validate that the above has demonstrated the ability to perform the skills listed below, in a simulated or work setting, within the practice guidelines established.</p>	
	<p>Are you competent performing/locating information?</p>					TEACH	REVIEW
<b>1. SJPPN Employee Orientation</b>	Contact /Resource	YES	NO				
a) SJPPN Organizational Chart							
b) Annual Corporate Responsibilities							
c) Annual TB test & Flu shots							
d) Benefit Election							
e) Dress Code							
f) Photo ID							
g) Proximity Card (as needed)							
h) Business Cards							
i) KRONOS-Time Reporting-PTO							
j) Biography							
k) Mileage							
<b>2. Equipment:</b>							
a) Cellular Phone							
b) Laptop Computer							
c) Practice Printers & Fax							
<b>3. SJPPN Resources:</b>							
a) Department Policies/Procedures							
b) Administration Offices							
c) Patients' Education Materials							

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	Are you competent performing / locating information?						
Procedure / Task	Contact/Resource	YES	NO	TEACH	REVIEW	DATE	INITIAL
a) SJPPN Care Management Distribution List							
b) Office Supplies							
c) Monthly Staff Meetings / Webinars							
<b>4. Ascension Environment of Care:</b>							
a) Disaster/Emergency Preparedness							
b) Security Department							
c) Email Phishing							
<b>5. SJPPN IT Applications:</b>							
a) IT Support / Help Line							
b) Ascension / Symphony Portal							
c) SJPHS Intranet							
d) K drive - CM shared drive							
e) Outlook Email / -PHI-							
f) Athena							
g) Ecare / Cerner							
h) Wellcentive							
i) VPN access							
j) MIDAS							
<b>6. SJPPN CM Training:</b>							
a)Self-Management/Motivational Interviewing							
b)Complex Care Management Training							
c) Micmrc.org							
d)Program education CPC+/SIM							

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	Are you competent performing / locating information?						
<b>Procedure / Task</b>	<b>Contact/Resource</b>	<b>YES</b>	<b>NO</b>	<b>TEACH</b>	<b>REVIEW</b>	<b>DATE</b>	<b>INITIAL</b>
e) Transition of Care							
f) Assessments, care plan, action plans							
g) Advance Care Planning							
h) Quality metrics / HCC-RAF							
i) Practice Introductions and workflow							
<b>7. Annual Wellness Visit:</b>							
a) Article Review							
b) ABCs of Annual Wellness Visit							
c) Making the Most of the AWV							
d) Medical Service Checklist							
e) Athena Documentation							
f) Mini-cog / Fall risk							
g) Depression/ETOH Screening							
h) Advance Directive							
i) Patient Health Risk Assessment							
j) Patient Brochure							
k) CMS Preventive Service Codes							
l) Physician ABCs of Initial Preventive							
m) Medicare Stars Reference							
							Updated 3/12/2017

ASSOCIATE SIGNATURE: \_\_\_\_\_

EVALUATOR(S) SIGNATURE: \_\_\_\_\_

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