

CHN Outreach Checklist

Name/ Netsmart # _____

	Documents Needed upon intake		Date completed / Uploaded
1.1	Initial Referral		
1.2	5055 Health Home Patient Information Sharing Consent		
1.3	PAM		
1.4	Intake Assessment		
1.5	Demographics Chart/ Page		
1.6	Fidelis Release of Information (if applicable)		
1.7	HIXNY form		
1.8	HIV assessment		
1.9	Rights and Responsibility Form		
1.10	DSS Release (optional)		
1.11	Comprehensive Assessment		
1.12	CAGE-AID		
1.13	MMS		
1.14	Social Determinants of Health		
1.15	UHS Authorization for release of protected Health Information if applicable		
1.16	Healthcare Proxy Booklet optional		
1.17	Obtain Medical Information and problem list		
1.18	Provide member with CHN After hours contact information sheet		
1.19	Mental Health Provider release of information form (if appl.)		
1.20	DOH - 5234 Notice of determination for enrollment		
1.21	DOH – 5236 Notice of denial for enrollment		
1.22	DOH- 5230 Functional assessment for HARP cases		
1.23	HML for enrollment		



	Opening Paperwork Checklist	Due Date	Date completed
2.1	Complete Care Plan within 60 days from intake		
2.2	Obtain Medical Information		
2.3	Obtain signature on care plan		
2.4	Send out Provider letters		
2.5	Upload all documents, HIXNY, DOH 5055, Releases, Medical Information, DOH 5234 DSS release optional, signed care plan		

	Recurring paperwork Checklist		
3.1	PAM every 6 months preferred or minimally annual		
3.2.	Update DOH 5055 consent as needed or annually and update consent tab		
3.3	Update Medical information as needed or yearly		
3.4	Update intake and comprehensive assessment / annually, CAGE and MMS if applicable 30-45 days before plan annual renewal date		
3.5	Update care plan annually and begin process in 11 month or sooner based on need/ Complete before annual plan date. Get signature and upload into Netsmart		
3.6	Update Medical information annually or after hospitalization/ ED or new diagnoses Update problem list if new problems have been identified		
3.7	Update releases of information		
3.8	Send out providers letters to new providers		
3.9	HML		
	Discharge Paperwork Checklist		



	Recurring paperwork Checklist		
4.1	DOH – 5235 Notice of Disenrollment		
4.2	DOH – 5058 Health Home patient withdrawal of consent		
4.3	End all consents in Netsmart		
4.4	Notify providers that CHN case is closed		
4.5	Send Referral Coordinator necessary documents for storage		

*Create folder with business card