

Enrollment Note:

Care Manager met with (Member) at his/her/their (location/ home). He/She/They is/are currently living in a (XXXXX) with (XXXXX, XXXX and XXXX). The following was completed/reviewed during this meeting:

1. Eligibility Verification
2. Comprehensive Assessment – including discussion and Member identification of needs for the plan of care.
3. See Annual Care Team Meeting Form for documentation on Multidisciplinary Team collaboration attempts/engagement in identifying needs for the POC.
4. SDOH assessment
5. Crisis plan.
6. DOH-5055 and updated all consents.
7. Reviewed and signed Rights and Responsibilities.
8. Member provided with a DOH-5234.
9. Member offered copies of all documents signed.
10. If HARP, see completed HCBS/CORE form for discussion of interest in services.

Annual Care Team Meeting Note Examples:**Note for attempts to engage Multi-disciplinary Team:**

CM sent letter/called/emailed/etc. to (Provider's Name) requesting attendance to the members annual care team meeting. See attachments for letter sent (if that was the method). See Annual Care Team Meeting Form all collaboration attempts/attendance.

Annual Care Team Meeting Note:

Care Manager met with (Member) at his/her/their (location/ home). He/She/They is/are currently living in a (XXXXX) with (XXXXX, XXXX and XXXX). The following was completed/reviewed during this meeting:

1. Eligibility Verification for continued eligibility
2. Comprehensive Assessment – including discussion and member identification of needs for the plan of care.
 - a. Discussion of Advanced Directives
3. See Annual Care Team Meeting Form for documentation on Multidisciplinary Team collaboration attempts/engagement in identifying needs for the POC.
4. SDOH assessment
5. Review of Crisis plan.
6. Reviewed/Updated the DOH-5055 and updated all consents. (If a page was ARCHIVED that should be identified.)
7. Reviewed Rights and Responsibilities.
8. Member offered copies of all documents signed.
9. If HARP, see completed HCBS/CORE form for discussion of interest in services.
10. Review of Member's Gaps in Care