## *Encounter Topics and Service Entry Guidance*

# Non-Medical Case Management

## Encounter Topics

More than one encounter topic may be used per service.

Intake

* Inclusive of eligibility determination. May be done by a case manager and billed under the Non-Medical Case Management service, or may be done by a benefits specialist and billed under Health Education. This is the only time that proof of status is required.

Initial Assessment

* SHP required assessment paperwork, acuity scale and care plan. This encounter topic should be used for the first assessment only.

Follow-Up

* Client contact not for assessment or eligibility reasons. This encounter should address the goals set forth in the care plan, and any emerging needs that the client may have.

6 Month Reassessment

* Inclusive of eligibility recertification. SHP required reassessment paperwork, acuity scale and care plan. Self-attestation may be used at this reassessment if no changes have occurred to client’s income, residency or insurance status. The six month reassessment may be conducted over the phone for individuals with an acuity score under 37.

Annual Reassessment

* Completed yearly, inclusive of eligibility recertification. SHP required reassessment paperwork, acuity scale and care plan. Additionally, this topic should be used if a client falls out of care, and returns at a later date.

Home Visit

* Only required for clients with an acuity score above 37. May be conducted for clients with an acuity score below 37 as needed.

Housing

* Assistance with locating housing, applying for housing, or other housing related activities.

Insurance

* Assistance with LAHAP, HIP, Health Insurance Marketplace/ACA, Medicaid or Medicare.

Case Conferencing

* Formal case conference to discuss updates and next steps for clients. This encounter topic may **only** be used by Case Management Supervisors.

Case Closure

* Closure of a case, or transfer to another agency. Reasons for case closure should be included in the case notes include:
  + Client has achieved goals in care plan and is moved into self-management
  + Client is no longer eligible for Ryan White Part B services or has moved to another service area
  + Client has requested for services to be closed
  + Client has acted in a way that puts provider personnel in danger
  + Client cannot be contacted after repeated attempts over a 12-month period including the 6-month reassessment requirement
  + Client dies

Transportation Coordination

* Assisting a client with transportation needs to medical or social service appointments.

Advocacy

* Collaboration with or advocacy to a professional services organization on behalf of the client (clinic staff, government office or other).

Other

* Other topics not represented above.

## NMCM social work face to face encounter

### Activities

* Initial assessment of service needs;
* Development of a comprehensive, individualized care plan;
* Continuous client monitoring to assess the efficacy of the care plan
* Re-evaluation of the care plan at least every 6 months with adaptations as necessary; and
* Ongoing assessment of the client’s and other key family members’ needs and personal support systems

### Staff

* This unit may be billed by anyone with a social work (RSW, CSW/LMSW, LCSW) counseling (PLPC, LPC, PLMFT, LMFT), or addiction counseling (RAC, CAC or LAC) license.

## NMCM other staff face to face encounter

### Activities

* Initial assessment of service needs;
* Development of a comprehensive, individualized care plan;
* Continuous client monitoring to assess the efficacy of the care plan
* Re-evaluation of the care plan at least every 6 months with adaptations as necessary; and
* Ongoing assessment of the client’s and other key family members’ needs and personal support systems

### Staff

* This unit may be billed by any individual without a mental health licensure. Staff must meet minimum education requirements set forth in the Ryan White Part B and HOPWA Universal Organization and Service Standards.

## NMCM social work other encounter

### Activities

* Initial assessment of service needs;
* Development of a comprehensive, individualized care plan;
* Continuous client monitoring to assess the efficacy of the care plan
* Re-evaluation of the care plan at least every 6 months with adaptations as necessary; and
* Ongoing assessment of the client’s and other key family members’ needs and personal support systems

### Staff

* This unit may be billed by anyone with a social work (RSW, CSW/LMSW, LCSW) counseling (PLPC, LPC, PLMFT, LMFT), or addiction counseling (RAC, CAC or LAC) license.

## NMCM other staff other encounter

### Activities

* Initial assessment of service needs;
* Development of a comprehensive, individualized care plan;
* Continuous client monitoring to assess the efficacy of the care plan
* Re-evaluation of the care plan at least every 6 months with adaptations as necessary; and
* Ongoing assessment of the client’s and other key family members’ needs and personal support systems

### Staff

* This unit may be billed by any individual without a mental health licensure. Staff must meet minimum education requirements set forth in the Ryan White Part B and HOPWA Universal Organization and Service Standards.

# Health Education

## Health Education: individual encounter

### Activities

* Education on health care coverage options (e.g. qualified health plans through the Marketplace, Medicaid coverage, Medicare coverage)
* Health literacy education

### Staff

* Staff performing Health Education and Risk Reduction activities must have a high school degree and at least two years of relevant experience. Providers must also demonstrate topic specific knowledge which will be used to provide these services.

## Health Education: 1 hour group encounter

### Activities

* Education on health care coverage options (e.g. qualified health plans through the Marketplace, Medicaid coverage, Medicare coverage)
* Health literacy education

### Staff

* Staff performing Health Education and Risk Reduction activities must have, at minimum, a high school degree and at least two years of relevant experience. Providers must also demonstrate topic specific knowledge which will be used to provide these services.

# Outreach

## 15 minute outreach to PLWH encounter

### Activities

* Outreach Services include the provision of reengagement of people who know their status into health services.

### Staff

* Staff performing Outreach Services must have, at minimum, a high school degree and at least two years of relevant experience.
* Provider(s) must demonstrate that employees hired to provide Outreach services have adequate knowledge of local primary care sites and agencies that provide supportive services, and are able to appropriately assist eligible people living with HIV in accessing these services.

# Referral

## Referral: 1 external referral

### Activities

* Referral and direction of clients to medical, psychosocial and educational resources as deemed necessary. Referrals may only be billed as a service if they are to outside agencies.

### Staff

* Staff performing Referral Services must have, at minimum, a high school degree and at least two years of relevant experience.
* Provider(s) must demonstrate that employees hired to provide Referral services have adequate knowledge of local primary care sites and agencies that provide supportive services, and are able to appropriately assist eligible people living with HIV in accessing these services.

# Medical Transportation

## 1 one way trip

### Activities

* This activity is billed for the provision of bus tokens, one way bus tickets, bus day passes, and single trip taxi vouchers.

### Staff

* Any staff may administer this service.

## Medical Transportation Dollar

### Activities

* This activity is payment for transportation services.

### Staff

* Any staff may administer this service.