

# CORE PROCESS

## Care Intake & Onboarding

### PURPOSE

To ensure that new clients are enrolled quickly, compliantly, and with a clear plan of care – setting the tone for a trusted care relationship and operational excellence.



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### REFERRAL CAPTURE & QUALIFICATION

*Owner: Case Manager / Operations Lead*

- Finalize care launch date.
- Conduct caregiver orientation on care plan.
- Perform welcome call or visit from case manager.
- Begin service delivery and track satisfaction in first week.



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### INITIAL CONTACT WITH CLIENT/FAMILY

*Owner: Intake Coordinator*

- Call or meet to gather preliminary personal, health, and payer info.
- Explain services, onboarding steps, and expectations.
- Send welcome materials (email/mail/portal).



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## ELIGIBILITY & PAYER VERIFICATION

*Owner: Billing or Authorization Specialist*

- Confirm Medicaid, Medicare, private insurance, or private pay.
- Verify authorizations and coverage limits.
- Document approval for services.



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## ASSESSMENT SCHEDULING & EXECUTION

*Owner: RN Assessor or Case Manager*

- Schedule nurse/social worker assessment.
- Conduct in-home or virtual assessment (physical, cognitive, home safety).
- Capture service plan requirements and client goals



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## SERVICE PLAN DEVELOPMENT

*Owner: Case Manager / Clinical Supervisor*

- Build individualized care plan based on assessment.
- Define visit frequency, caregiver qualifications, care tasks.
- Approve plan with clinical supervisor and family.



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## CONSENT & DOCUMENTATION COLLECTION

*Owner: Intake Coordinator*

- Collect required documents:
  - Consent to treat
  - HIPAA authorization
  - Emergency contacts
  - Power of attorney or legal guardianship docs (if applicable)
- Digitally store all documents in EMR/SharePoint.



07

## CAREGIVER MATCHING & SCHEDULING

*Owner: Scheduler / Staffing Coordinator*

- Match caregiver(s) based on client needs, preferences, and availability.
- Introduce caregiver(s) to family if possible.
- Schedule first week of visits.



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## KICKOFF & WARM HANDOFF

*Owner: Case Manager / Operations Lead*

- Finalize care launch date.
- Conduct caregiver orientation on care plan.
- Perform welcome call or visit from case manager.
- Begin service delivery and track satisfaction in first week.



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## INTERNAL CASE HANDOFF & DOCUMENTATION FINALIZATION

*Owner: Intake Coordinator / Clinical Admin*

- Transfer full case to ongoing care team.
- Review documentation completeness and compliance.
- Mark client as Active in system and on reporting dashboards.