New Client Intake Folder

1. Caregiver Service Assessment Form/ AFCSP Eligibility Form/NFCSP Eligibility Form

2. Release of Information

3. Family Caregiver Needs Assessment

4. Program Evaluation (complete within the first 30 days and at 6-month review or when ending program)

5. ADRC Survey (annually)

6. HDM assessment

7. Risk Assessment for Vulnerable Clients

8. Doctor Diagnosis Form (AFCSP only)

9. PERS

10. Caregiver Connection Brochure, Coffee Flyer (other local resources)

11. Customer Satisfaction Survey (DHS)

Complete After Intake Home Visit

1. Put notes into SAMS

2. Send Dr. Verification Form

3. Call the service provider to see if they have staff to accommodate authorization.

4. Fax the service authorization along with a Fax Cover Page.

5. Enter Service Authorization.

6. Create a Client file

7. Schedule 6 month visit

National Family Caregiver and Support Program (NFCSP) Checklist 2024

<u>New Applicant</u>

1) Upon receipt of referral or inquiry obtain:
   a. ___Caregiver name and ask for correct spelling, DOB, address, phone or contact information, care recipient name, DOB, address and phone or contact information.
   b. ___Set up in-person Caregiver Needs Assessment. Date/time_____
   c. ___Enter caregiver in REDCAP.
   d. ___Enter caregiver and recipient in WellSky/SAMS-connect them by identifying CG as PRIMARY

2) At-home/in-person visit:
   a. ___Complete Caregiver Needs Assessment (start with 5 questions at the end of the form)
   b. ___Complete NFCSP Caregiver Registration Form
   c. ___Offer information on additional resources (i.e. support groups, online, classes)
   d. ___Explain the process of reimbursement for incurred expenses and provide forms.
   e. ___Document assessment and journal notes in WellSky.
   f. ___Enter the initial assessment into REDCAP.

3) Follow up for qualifying recipient:
   a. ___Mail welcome letter with expense forms (NFCSP expense forms-WHITE)
   b. ___Offer follow-up information and additional resources.
   c. ___Process incoming expenses
   d. ___Review finances and expenses in June-may have additional funding.
   e. ___Enter Pre-Evaluation complete in REDCAP after one week.
   f. ___Customer Satisfaction Survey
   g. ___Enter post-evaluation complete in REDCAP after approximately 6 months.
   h. ___Every 3-6 months meet with Financial to review available funding.
   i. ___If additional funds are available mail a letter to Caregiver to notify them.
   j. ___Provide ongoing availability for questions/additional info/resources.
   k. ___Document contacts in Journals in WellSky.
   l. ___Annually Complete Renewal:

       -Caregiver Needs Assessment
       -Update demographic information
   k. ___Enter reevaluation and updates in WellSky.

4) Process Bills or Expense submissions:

NFCSP Checklist

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- [ ] Appt. Set
- [ ] Care-plan created/Excel
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- [ ] Wellsky CG/CR
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