

### “Transitional Care Services Program Enrollment (TCS)”

*Effective January 1, 2020, TCS is available to all programs that offer case management services. Follow guidelines for TCS created by the County QM unit. Episode/intake must be closed within 30 days of the Intake date.*

1. Complete a Client Profile (if one exists in the agency, review for accuracy and edit as necessary)
2. **Open a new episode**/intake by Completing a Contact Profile
  - Review for accuracy, click on Complete Review and then click Create Intake
3. Complete the Intake screen
  - In order to complete a Program Enrollment, the Intake/case must stay open
  - 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Available TX Appt date and the 1<sup>st</sup> Accepted TX Appt = Leave Blank
  - The Intake will show “In Progress” status on the Activity List but this will not prevent entering a Program Enrollment or encounter
  - Save and Finish
4. **No Admission or discharge record should be added**
5. Complete the Benefit Enrollment Plan under Payor Group Enrollment according to the client’s benefit
6. Complete the “Transitional Care Services” Program Enrollment
  - Complete required fields
  - Start Date = Same as Intake Date
  - Save and Finish
7. Complete Encounters for each case management service according to QM guidelines
  - Complete all required fields
  - Note Type = select the appropriate type - DMC Billable or County Billable
  - Billable = YES
  - **Start Time and End Time must be entered** on the Encounter
  - Save and Release to Billing
8. Once you have completed TCS services and billing go back to the Transitional Care Services Program Enrollment
  - Enter the End Date
  - Enter the Termination Reason and Notes
  - Save and Finish
9. Go back to the Benefit Enrollment Plan under Payor Group enrollment
  - Enter the End date = same date as program enrollment end date
10. Close the episode/intake, go back to the Intake screen
  - Enter the Date Closed (This should be the same as the TCS Program Enrollment End Date and no more than 30 days of the Intake date)
  - Enter Closure Reason
  - Click hyperlink for Save and Close Case
  - Click Finish