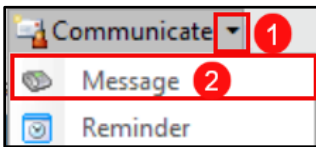# Case Closure for Care Managers

Patient Cannot be Reached

If the patient cannot be reached after three attempts, a message should be sent to the referring provider and a letter is sent to the patient.

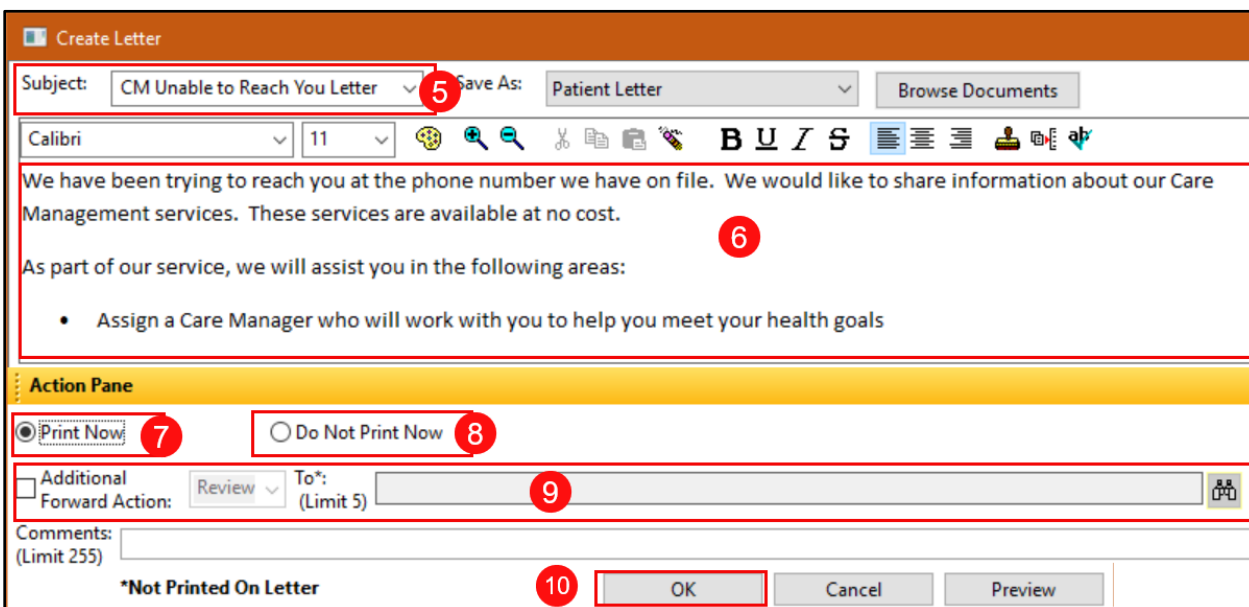Complete the following steps to create a provider letter:

1. Click the down-arrow next to communicate.
2. Click message, change the Subject to *Care Manager Unable to Contact*, complete and send the message.

Complete the following steps to create a patient letter:
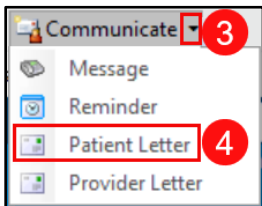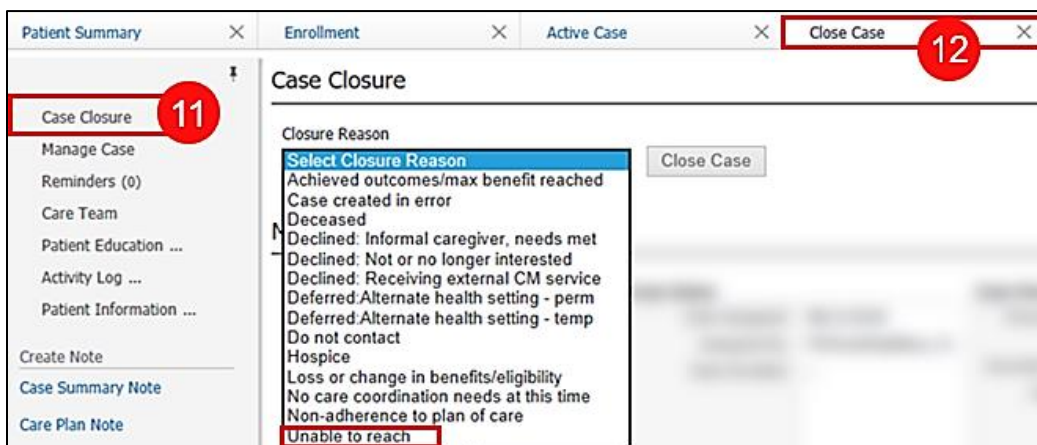

3. Click on the arrow next to Communicate.
4. Select Patient Letter.

5. Ensure that the CM Unable to Reach You Letter is selected from the Subject dropdown.
6. Edit the body of the letter as needed.
7. Select Print Now.
   or
8. Do Not Print Now, if support staff will be sending the letter.
9. If support staff will be sending the letter, select the Additional Forward Action box, and enter the recipient's name in the To* field.
10. Click Ok.

11. Select the Case Closure component.
12. Click the down arrow and select Unable to Reach as the Closure Reason.

Note: Once an existing case is closed it cannot be reopened but the Closure Reason can be edited. A new case would need to be opened by manually adding the patient to Case List.

Patient Declines Enrollment

If the patient is contacted and indicates that they do not want to participate in care management services, a message is sent to the referring provider. *(If the patient was identified by the algorithm and not referred by a provider skip to step 3).*
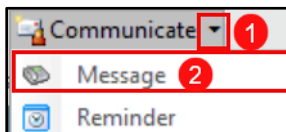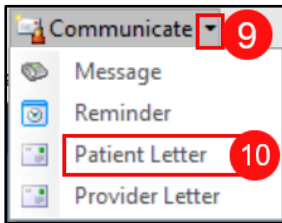

1. Click the down-arrow next to communicate.
2. Click message, change the Subject to *Care Management Patient Declined Enrollment*, complete and send the message.
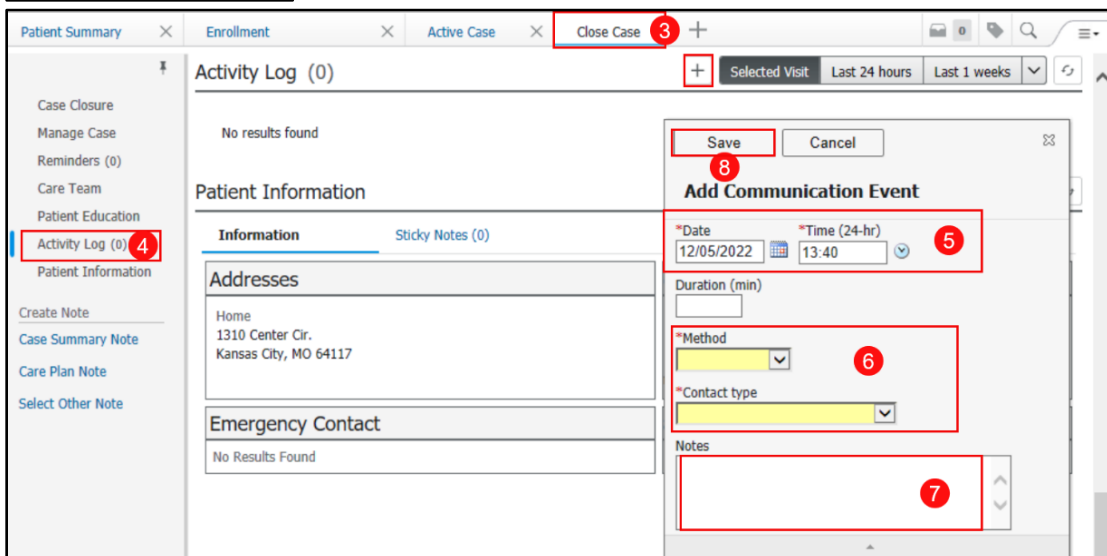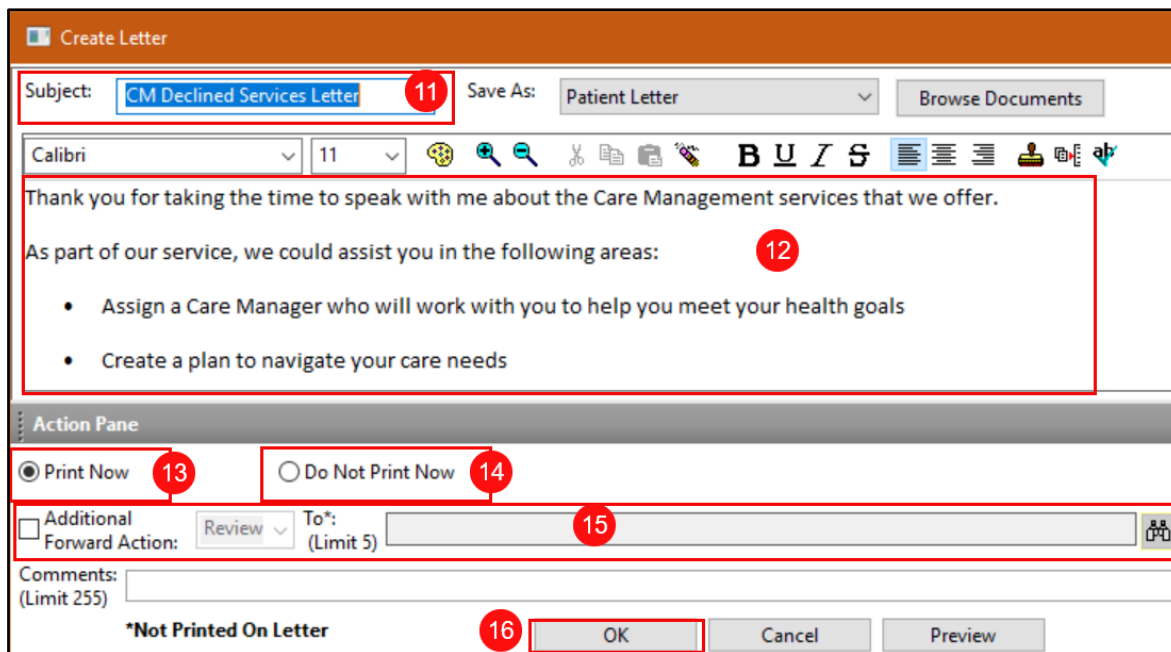

3. Click on the Close Case tab.
4. Click on the Activity Log component.
5. Select the correct Date and Time.
6. Select the desired Method and Contact type.
7. Add a note.
8. Click Save.

A letter should also be sent to patients that were contacted and declined care management services.

9. Click on the arrow next to Communicate.
10. Select Patient Letter.

11. Ensure that the CM Declined Service Letter is selected.
12. Edit the body of the letter as needed.
13. Select Print Now.

or

14. Do Not Print Now, if support staff will be sending the letter.
15. If support staff will be sending the letter, select the Additional Forward Action box, and enter the recipient's name in the To* field.
16. Click OK.

17. Select the Case Closure component.
18. Click the down arrow and select Declined as the Closure Reason.

Note: Once an existing case is closed it cannot be reopened but the Closure Reason can be edited. A new case would need to be opened by manually adding the patient to Case List.