# Care Coordination

SERVICE PROVIDERS

Community Care
Soins Communautaires NB

| USER GUIDE|

Version 0.3

# Table of Contents

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# Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer back to what these changes were.

| **Version Control** | | | |
|---|---|---|---|
| **Version** | **Edited** | **Date** | **Changes** |
| 0.1 | Amy Michaud | 06/03/2024 | First Draft |
| 0.2 | Amy Michaud | 07/25/2024 | Reviewed and edited content/ reformatted /added versions and confidential statement |
| 0.3 | Amy Michaud | 07/31/2024 | Define Service Requests / Defined Urgency Types |

# MODULE A2 – CARE COORDINATION

**PURPOSE:** Become familiar with the background and concepts of the CCNB platform.

## Module Overview

CommunityCareNB (CCNB) is a digital platform for Service Providers to manage services and directly communicate with Social Development. CCNB allows for the information related to the people we share and serve to be all in one place. This guide will focus on the Care Coordination role within CCNB. To learn more about CCNB (purpose, icon definitions and basic navigation) refer to **Module A1 – Introduction to CCNB Partner Portal**. For information related to financial tasks, refer to **Module A3 - Finance**.

While working in CCNB with the Care Coordination persona, you will have access to various functions and features. These functions and features include:

- Receiving and responding to requests for service (e.g., SD worker, days, hours, what type of support), and relevant client information.
- Communicate with SD worker about incidents, changes, and to request changes to services
- Active and historical information will be visible in the same place for easy reference and review. These topics and more will be covered throughout the user guide.

# Service Requests

A Service Request is created by a Social Development (SD) Worker. It contains information pertinent to the client such as: name, address, contact information, SD Worker, and much more. Additionally, the Service Request outlines the number of hours/days, the duration (start and end dates) of services, as well as the client's preferred days of the week.

If a Service Request should be terminated, paused, or modified request can be made by **Logging a Change Request.** A Service Request will remain viewable and actionable after it has been Paused or Terminated. This means that, if required, communication with Social Development (i.e., through service reports) can continue by accessing the relevant client's service request.

Lastly, a Service Request has different stages of viewable/accessible information and actionable items (e.g., logging an incident report).

- A pending service request will only provide basic information related to the service and the client's general location (client's name is not visible at this stage).
- An accepted service request will display all pertinent information (e.g., name, address, etc.) however, you will not be able to log service reports (incident and observable changes) or request changes to service.
- Activated service requests will display the same information as an accepted. The difference between the two is that an activated service request will display the following buttons:
  - Log an Incident Report (Service Report)
  - Log an Observable Change (Service (Report)
  - Log a Change Request

All service requests (with the exception of declined) are found under the **Service Request** tab.

**IMPORTANT: Home Support Initial Assessment and Meal Services CANNOT log Service Reports (incident reports and observable changes).**

# Pending Service Requests

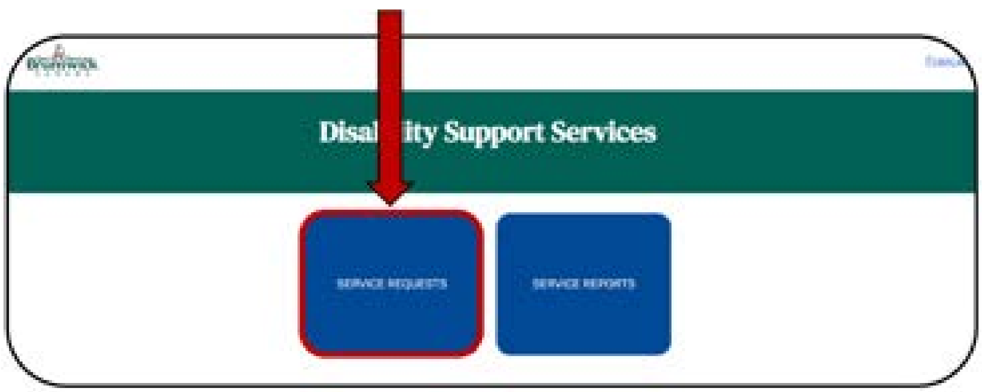
A Pending Service Request is a service request that has been offered by Social Development and requires review. Access the Service Request tab to view and manage pending service requests and basic client information such as: contact information, Primary SD worker, service request details, notes to service provider, preferred schedule, etc.

The following topics will cover how to accept, decline, view and add comments to offered/pending service requests.

## View Pending Service Requests

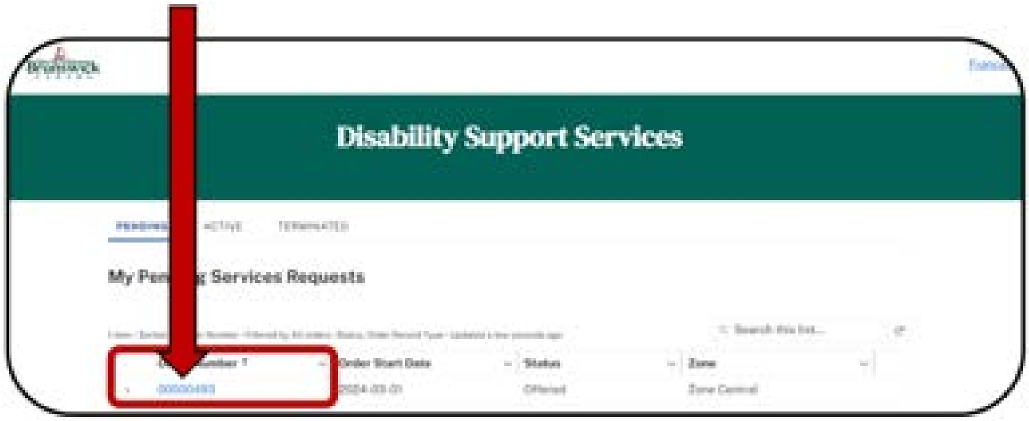
To locate and view basic and essential information on a pending service request, follow the steps below:

1. From the homepage, select the **Service Requests tab.**

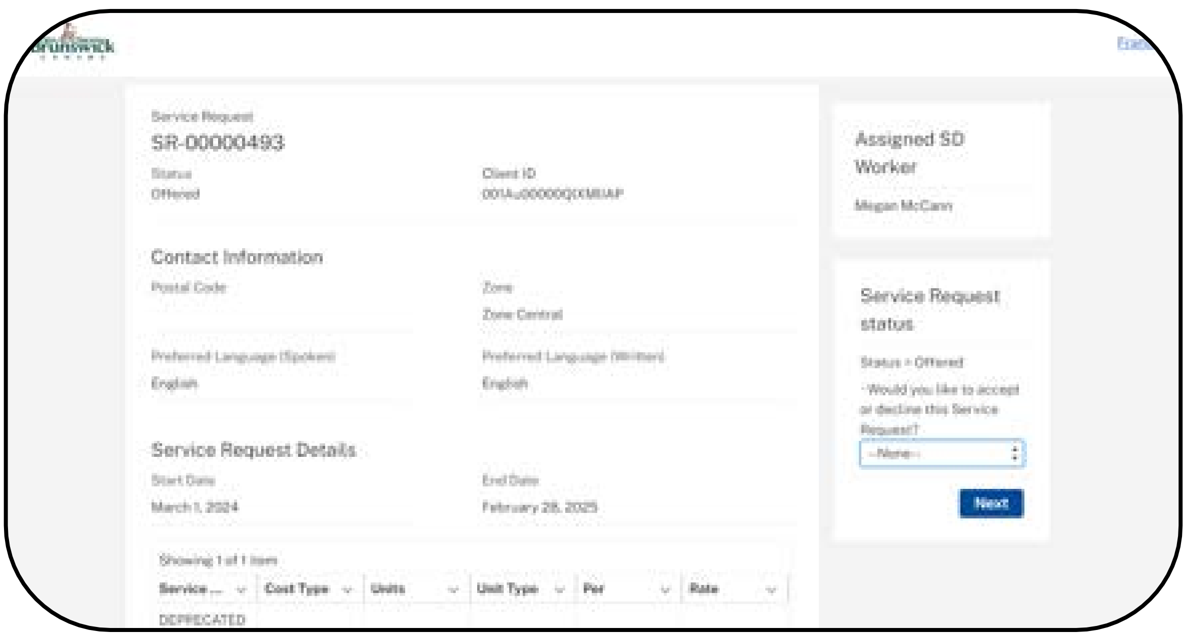



2. The **Pending** tab is automatically displayed. This tab displays only the Order Number, Start Date, Status and the Zone.

3. Select the **Order Number Hyperlink** to open the offered Service Request.




4. The Offered Service Request opens and displays the necessary information required to either **accept** or **decline** (i.e., contact information, assigned SD worker, service request details, notes to service provider, preferred schedule).

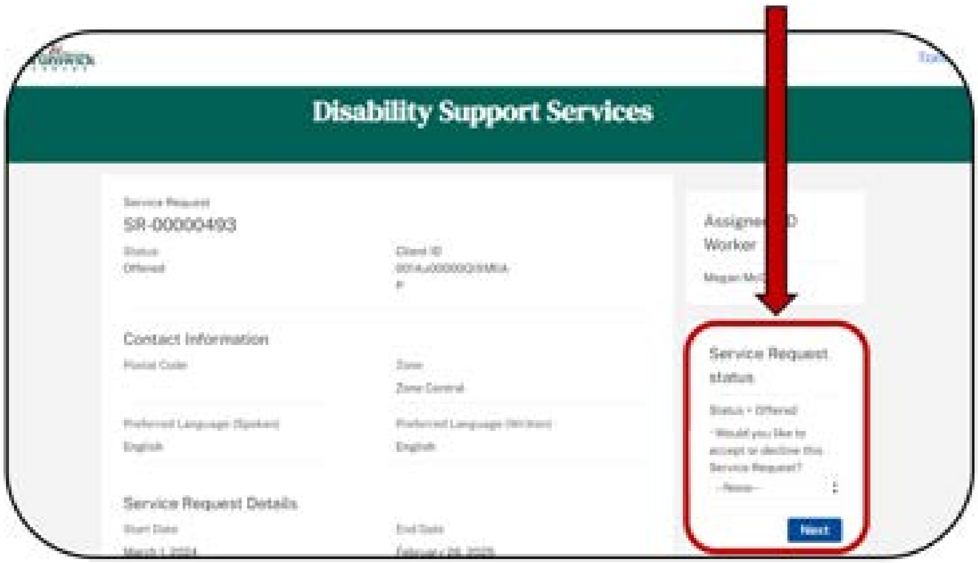



**NOTE:** If ever a client's worker needs to be confirmed or contacted, open the service request and the SD worker will always be current.

## Accept Service Requests

1. Locate and open an **Offered Service Request** found under the pending tab.

2. Once opened and reviewed, locate the **Service Request Status** field.




3. Select the dropdown menu with **"- -None- -"** displayed.

4. Select **"Accept request"**.

5. Click the **Next** pushbutton.

6. A verification question will appear in the **Service Request Status** field.
   ***Optional*: *include a message for Social Development.***


7. The **Service Request Status** is updated to **Status = Accepted**.

**NOTE:** Client demographic information is now available.

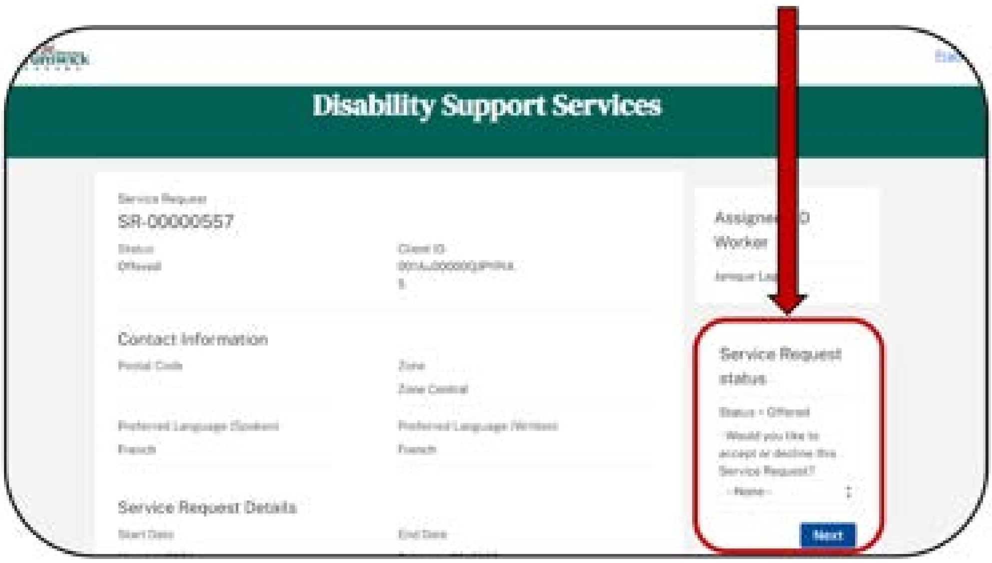
## Decline Service Requests

Select decline if unable to accommodate the full request (e.g., total number of hours) OR select decline and add a comment indicating what can be provided.

1. Locate and open an **Offered Service Request** found under the Pending tab.

2. Once opened and reviewed, locate the **Service Request Status** field.

3. Select the dropdown menu with **"- -None- -"** displayed.

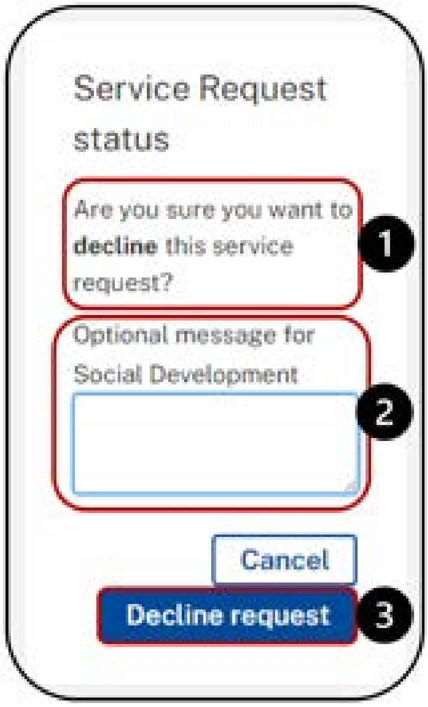



4. Select **"Decline request"**.

5. Click the **Next** pushbutton.

6. (1) A verification question will appear in the **Service Request Status** field.

   ***(2) Optional:*** *include a message for Social Development. If partial services are possible, provide request information here.*




7. The **Service Request** is no longer displayed, and the Homepage is displayed.

**NOTE:** Service requests are no longer visible once declined; however, pending, active, and terminated service requests can be viewed in the service reports section.

# Accepted & Active Service Requests

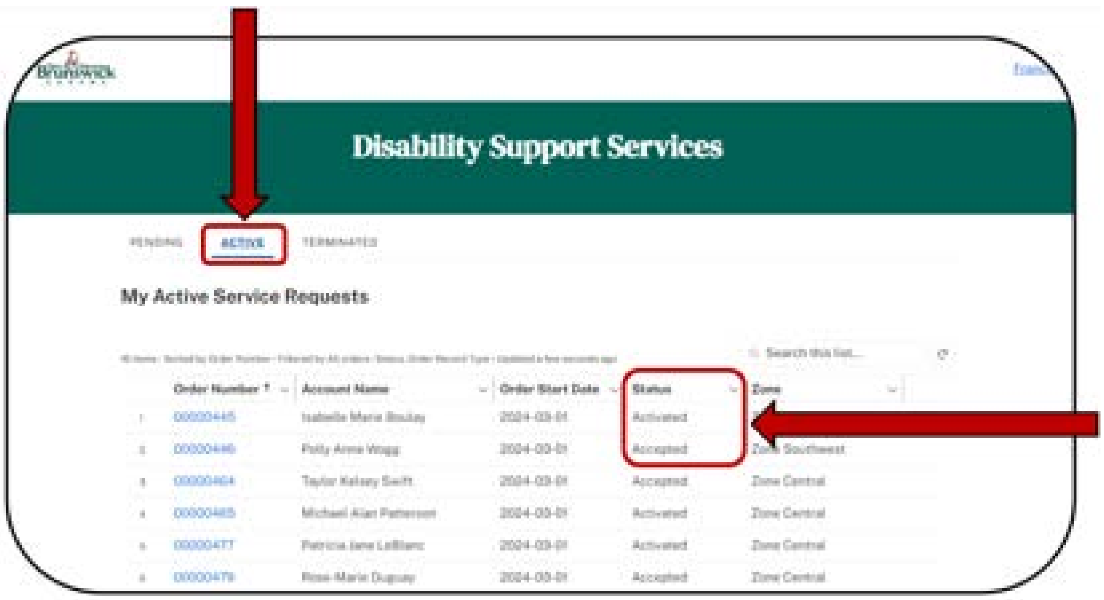
Once a Service Request has been activated by the SD worker, several functions and features will become available. This section of the user guide will cover how to navigate and view a Service Request and showcase the differences between an Accepted and Active Service Request.

**IMPORTANT:** A service is approved to be delivered ONLY once status is activated by Social Development.

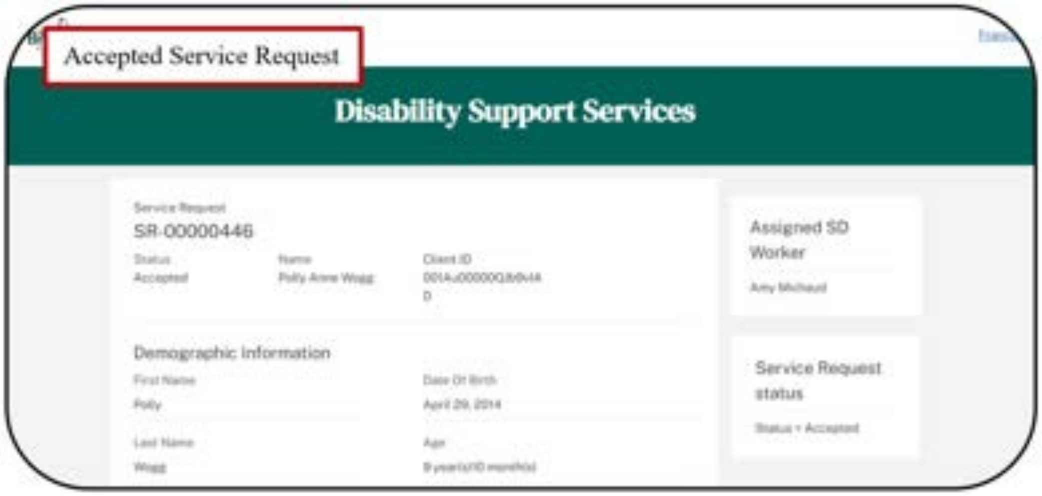
## Navigating & Viewing

1. From the homepage, select the **Service Request** tab.

2. Once the window is displayed, select the **Active** tab. The Active tab displays **BOTH** Accepted and Active service requests.




3. An **ACCEPTED** Service Request displays client demographic information, and any other information related to the services. NO actions (i.e., log service reports) can be performed until a service request has been activated by Social Development.




4. An **ACTIVE** Service Request displays same information as an Accepted Service Request **however,** actions related to the client (i.e., log service reports) are now available.

# Service Reports

Once a Service Request has been Activated by Social Development, three features to support ongoing communication and collaboration between the service provider and Social Development will become available: Incident Reporting, Observable Change, and Change Request.

When an **incident** occurs with a client, it needs to be reported to Social Development. This can now happen within CCNB via the partner portal account. This new digital incident reporting has items that auto-populate and drop down menus to make it easier to complete and monitor trends.

In addition to incident reporting, service providers can now share pertinent information about a client that is not an incident but could be an early warning sign or a positive achievement. This new feature is called, **log an observable change**.

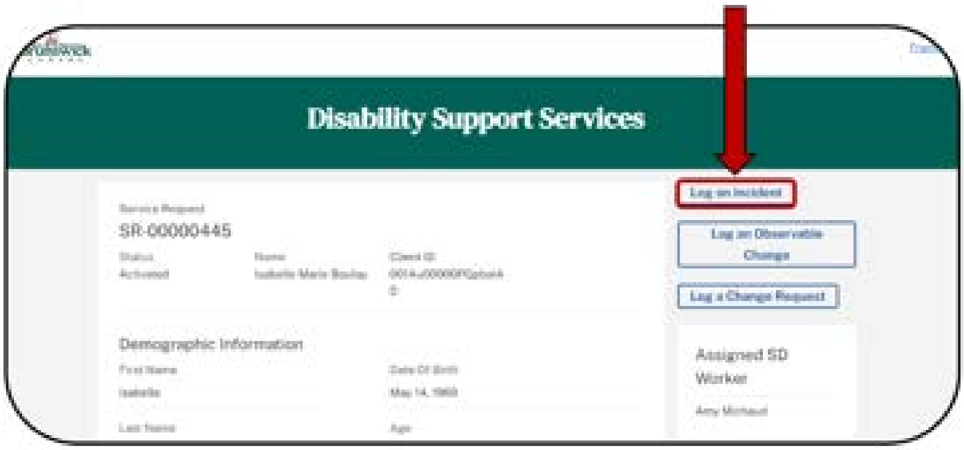
Additionally, Service Provides now have the ability to **request a change** to the client's service such as adjustments in hours of service, temporary pause of service, and end service.

All of these tasks are completed by first opening the relevant active or terminated service request. When any of these three services reports are logged, it will notify the primary worker.

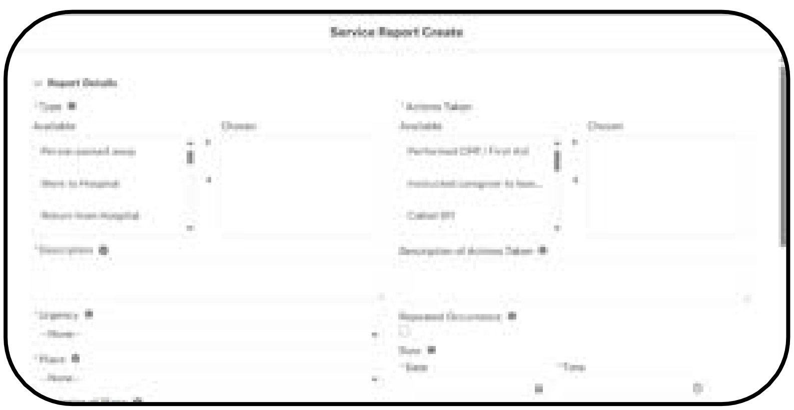
## Log an Incident Report (Active or Terminated)

1. Locate and open the applicable **Active** or **Terminated** Service Request.

2. Once on the Service Request Details window, select the **Log an Incident** pushbutton.




3. A pop up window will appear where the **Incident** details are captured. All mandatory fields are indicated by a red Asterix (*).



4. For the **Type** and **Action Taken** list boxes, the same action will be performed in order to log the incident and action taken. Begin by selecting the relevant item under **Available.**


5. Select the **forward arrow** ( ▶ ) located between the Available and Chosen list boxes. Once clicked, the selected Available item will be moved over to **Chosen.** This will have to be done individually for all applicable Type and Action Taken items.

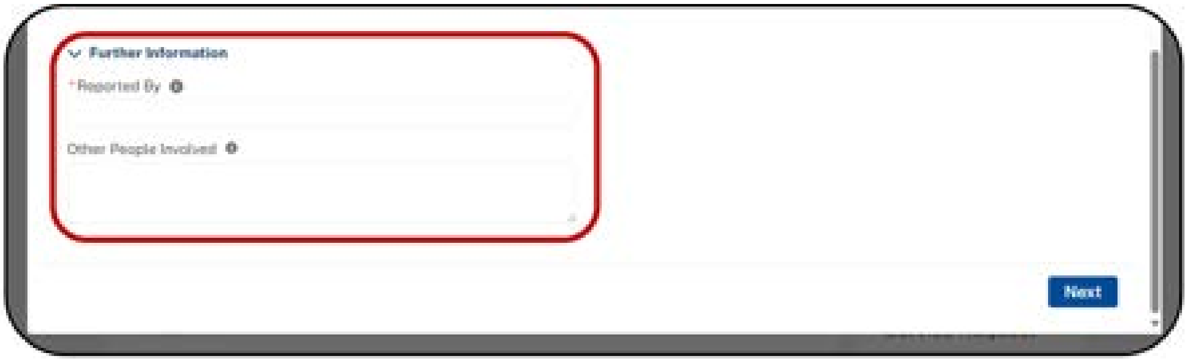

6. The description field for "type" of incident will require a detailed description of the incident (e.g., if **Fall** is selected, describe how and where they fell, and if this has happened before). The Description of Actions Taken field is optional.

**Note:** Items that have been moved to the **Chosen** field can be removed by selecting the item in that field and clicking on the back ( ◀ ) arrow.

7. Complete the following fields by selecting **Urgency** and **Place** (i.e., where the incident occurred) from the dropdown lists.


8. Complete the **Date** and **Time** fields. Select the **Repeated Occurrence** and **Follow-up Required** checkboxes if applicable. If the Social Development worker should contact the Agency, please select **follow up required**.

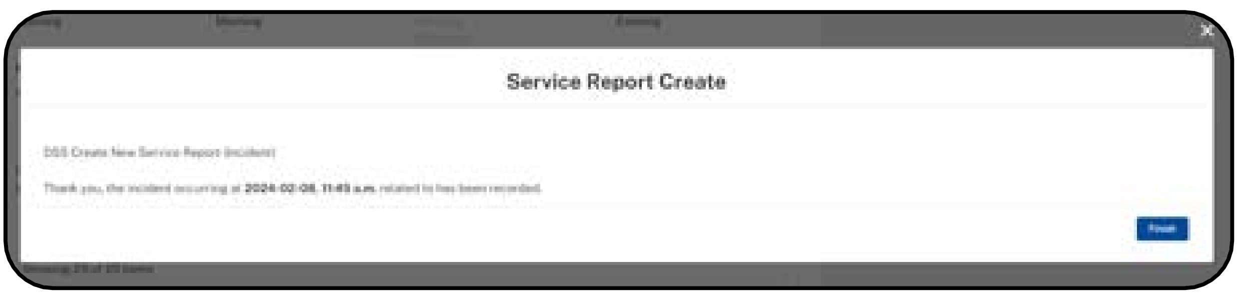

9. Indicate who it was **Reported By,** and any other people involved.




**NOTE:** The Client or SD worker's name do not need to be included. The Incident Report is automatically attached to the client's Service Request, and the report will go directly to the SD worker assigned to the client.

10. Select the **Next** pushbutton.

11. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

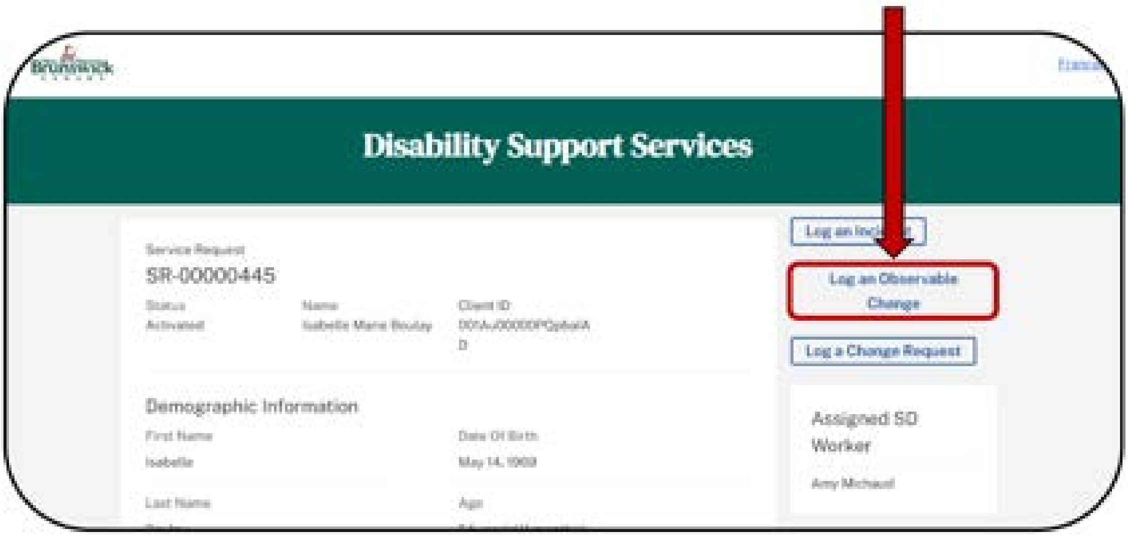


## Log an Observable Change (Active or Terminated)

Observable changes are not incident reports, but other information the service provider feels would help important for SD worker to know.  This information can be positive or negative. Observable change template is similar to an Incident Report. Separating these functions makes it easier for SD workers to triage and respond appropriately.

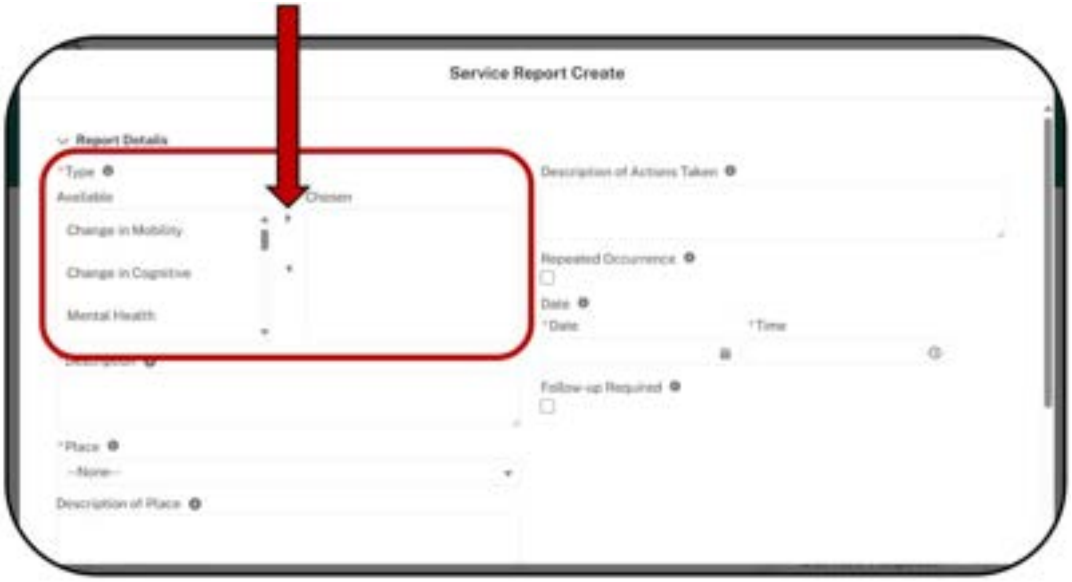
1. Locate and open the applicable **Active** or **Terminated** Service Request.

2. Once on the Service Request Details window, select the **Log an Observable Change** pushbutton.



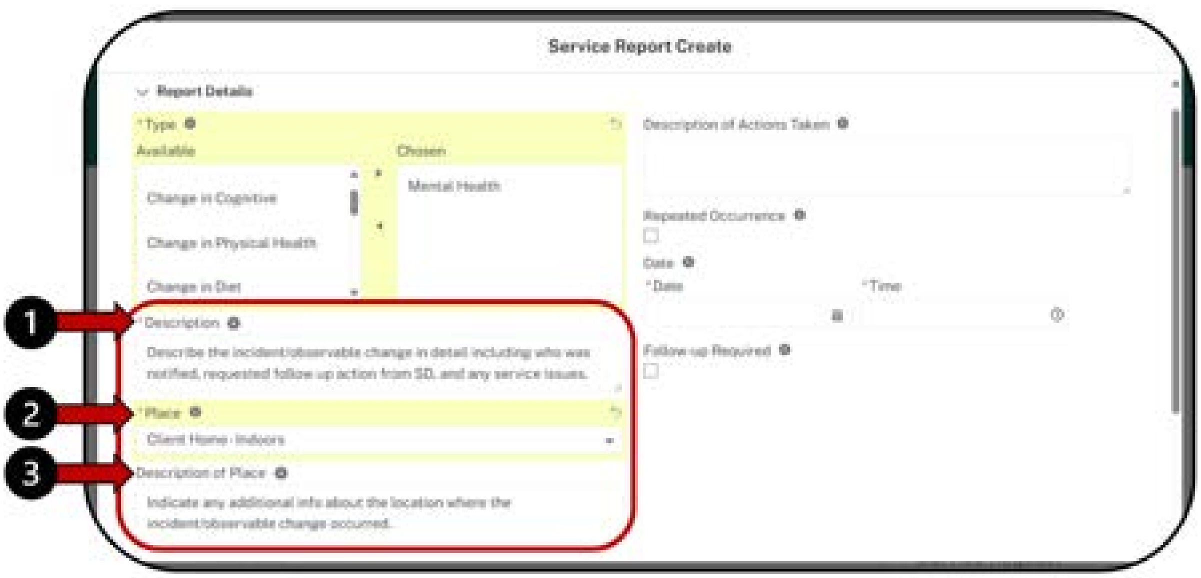

3. A pop up window will appear where **Observable Change** details are captured . All mandatory fields are indicated by a red Asterix (*).

4. In the **Type** field, select the **Available** observable change. Once selected, move it to **Chosen** by clicking the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to **Chosen.** Do this individually for all applicable observable changes if more than one applies.




5. Provide a detailed **Description** of the observed change including who was notified.

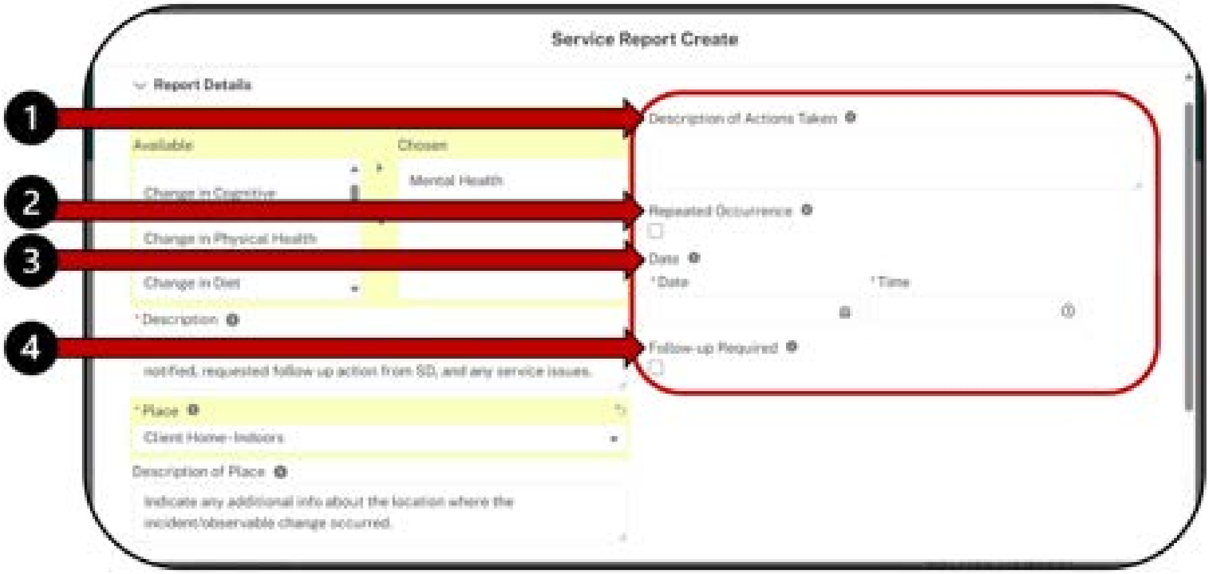
6. Indicate where the observed change took **Place** and provide additional information in the **Description of Place** text field.



7. Provide a **Description of Actions Taken** if applicable.

8. Capture the **Date** and **Time** of the observable change.

9. If applicable or necessary, select the **Repeated Occurrence** or **Follow-up Required** checkbox.




10. In the **Further Information** section, indicate who the incident was **Reported By** and select the **Next** pushbutton.

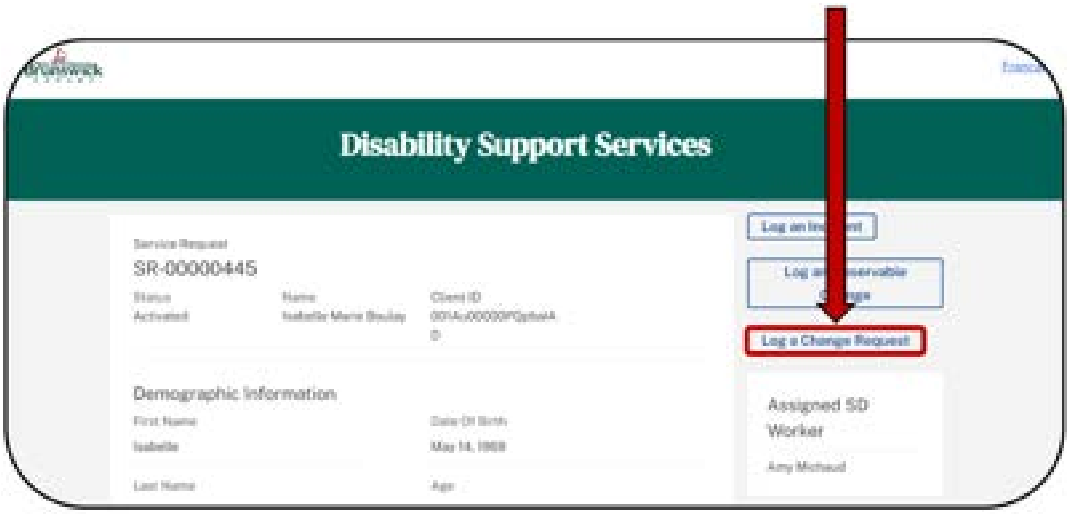

11. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

## Log a Change Request

When the need to make adjustments to a client's service is presented, CCNB provides Service Providers with the ability to log change requests (i.e., modify, pause, end) directly to Social Development. For example, the need may arise from a service provider's observations, at the request of the client, or based on changing needs identified by the SD Worker. This feature is intended to make it easier for service providers to initiate and document the request to change.

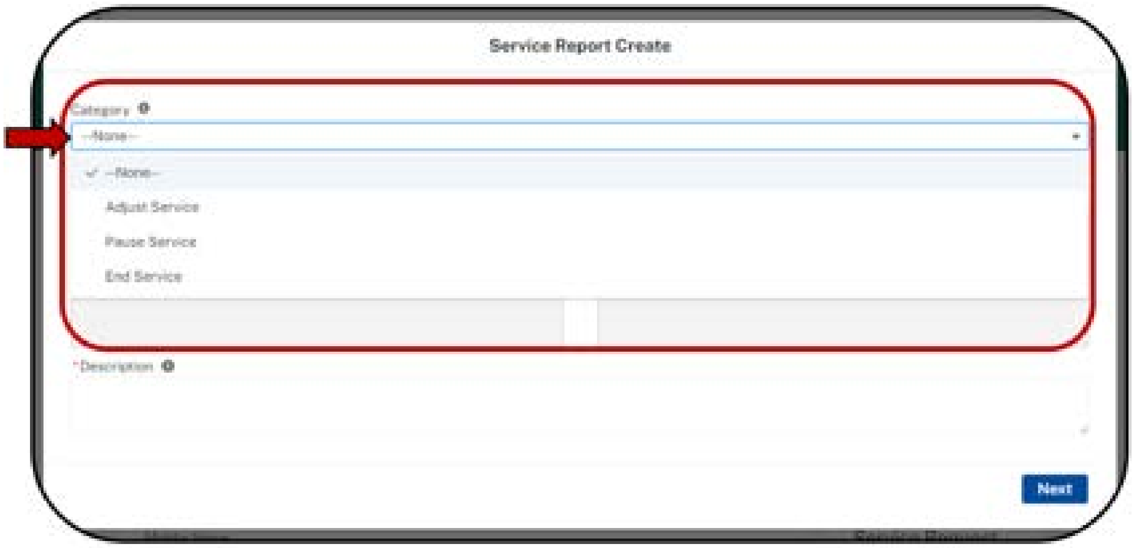
1. Locate and open the applicable **Active** or **Terminated** Service Request.

2. Once on the Service Request Details window, select the **Log a Change Request** pushbutton.

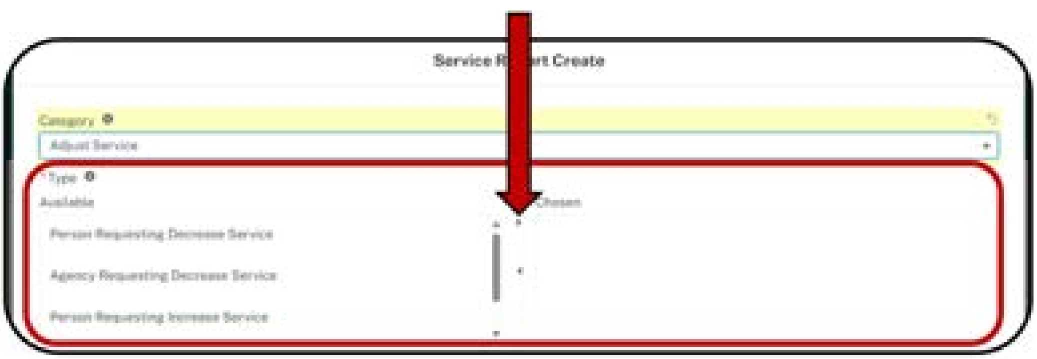


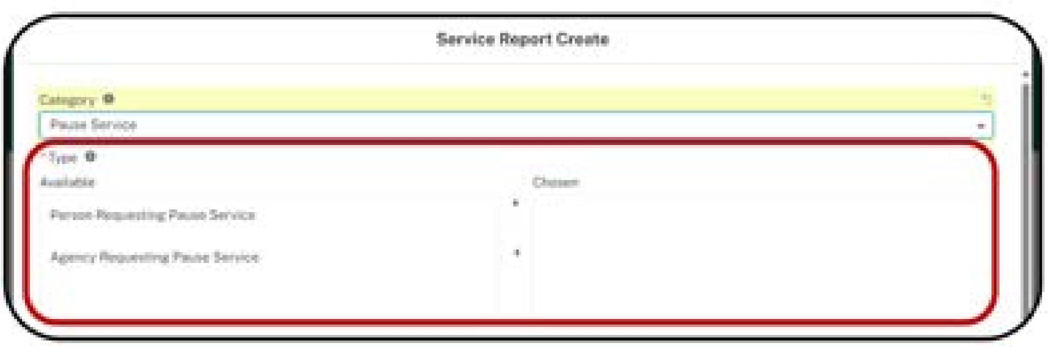

3. A pop up window will appear where **Change Request** details are captured. All mandatory fields are indicated by a red Asterix (*).

4. Select the **Category** from the dropdown menu. The available types will populate in accordance with the chosen category.




5. In the **Type** field, select the **Available Change Request Type**. Once selected, move it to **Chosen** by clicking the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to **Chosen.**




6. Provide a description of the change in detail and the reason for the change request.


7. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

# Logged Service Reports

Whenever an Observable Change or Incident is logged, the service report can be accessed either through an individual's Service Request or through the Service Reports tab on the Homepage. This also applies to Change Requests that have been logged on behalf of the client or by the agency.

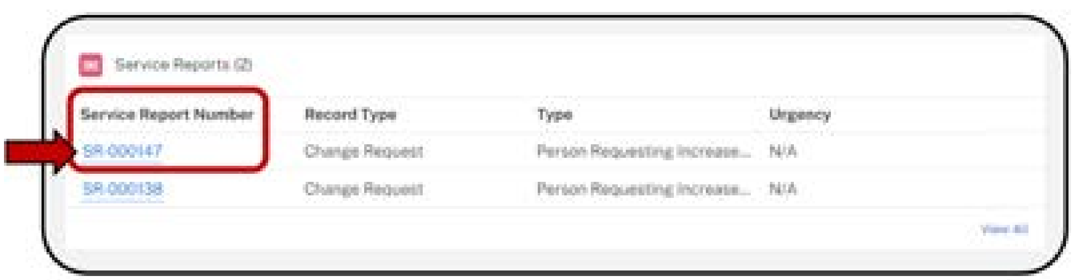
## Open Client's Service Report

When searching for a specific client's Service Report, the most efficient way is to access the Service Report(s) through their individual Service Requests.

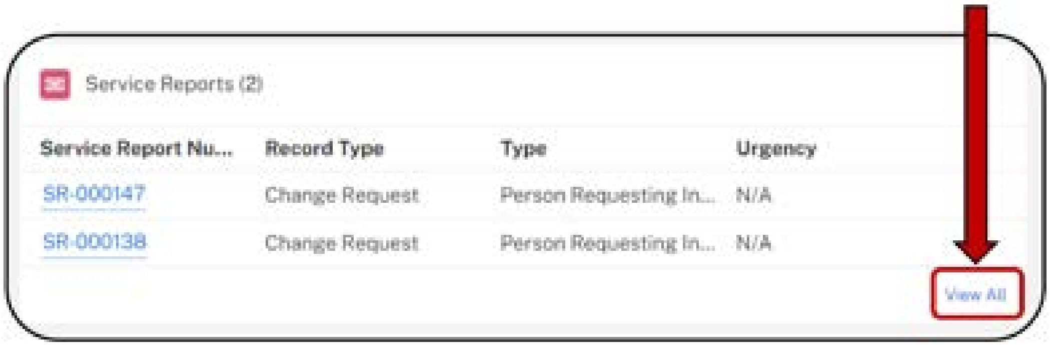
1. Navigate to and open the applicable client Service Request (re: View Service Requests)

2. Once on the Service Request, scroll down and locate the **Service Reports** field.


3. Click the applicable **Service Report Number** hyperlink.



4. The **Service Report** is displayed.
5. To see all Service Reports relating to the service request, click the **View All** button.




6. The **Service Report List** for **<u>that</u>** service request is displayed. From this list, select the applicable **Service Report Number** hyperlink.

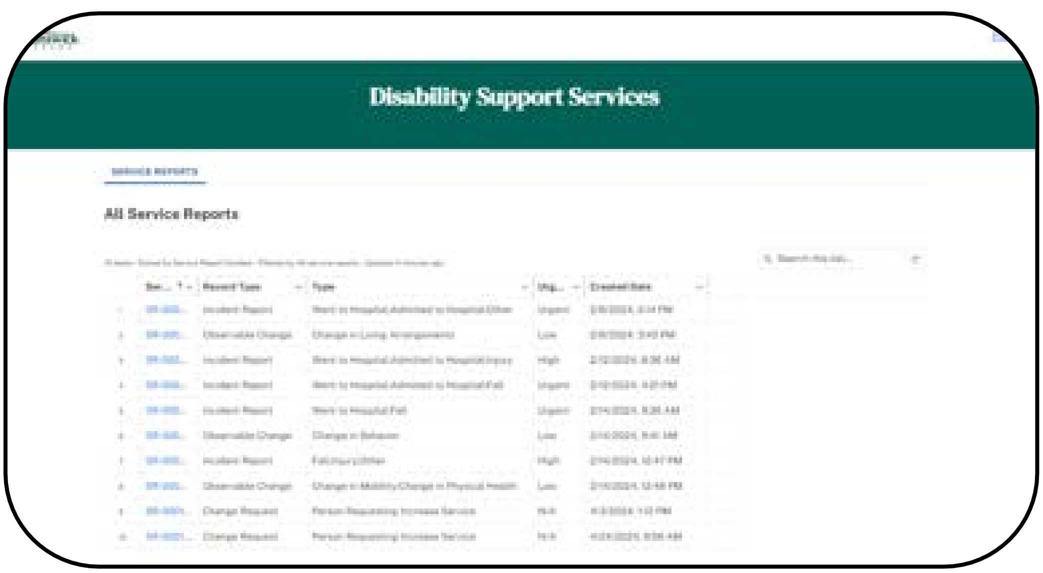
## Open Service Report List

The Service Report List that is accessible from the homepage, will display **ALL** service reports that have been logged for all clients (Active & Terminated). To view this list, follow the steps below.

1. From the homepage, select the **Service Reports** tab**.**


2. The Service Reports list is displayed. From here, all Service Reports and their record type, incident or observable change, urgency and date create are viewable.

3. Select the Service Report Number hyperlink. Sort the List by using the column headers.



# Conclusion

By completing this module, you have covered:

- What is Care Coordination
- Navigating Service Requests
- Pending Service Request – Accept or Decline
- Accepted vs Active Service Requests
- How to log a Service Report (Incident, Observable or Change Request)
- Viewing Historical Service Reports