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Tips for new supervisors

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Encompass access off site

To log into Encompass from non-county sites: <http://www.ewcho.org>. Off – site access is restricted to supervisors, prescribers, nurses and those staff who have advance supervisory approval (from you).

Admissions/transfers/discharges

It is the supervisors responsibility to enter admissions, transfers and discharges of clients into Encompass. At Youth & Family and DD services, one designated supervisor completes the admission form and assigns physicians, and staff. At MI Adult Services each supervisor is responsible for their own teams.

You will receive an email notice for new clients referred from Access. Do not complete the admission information until the client actually shows up for the appointment. In adult services, forward the notice of intake appointment to the staff you think you will assign to the case.

Make sure to complete all the relevant information at admission:

1. Admission diagnosis if different than what comes forward from Access
2. Team assignment
3. CSM assignment
4. Attending physician
5. Nurse – if applicable
6. Psychologist – if applicable
7. Disability designation
8. Service designation
9. Diagnostic category

Use the “Change” button to correct any errors or fill in missing information.

Use the Transfer button to assign to a different csm, attending physician, other staff or other team. Be sure to indicate the reason for change.

To help you manage your teams and clients, use Case Load and Census. You can view team caseloads, csm caseloads, assign case managers. In this menu, you can also transfer an entire caseload from one case manager to another. This is often useful when staff leave or the team is reorganizing.

Signing off on documents

Although you will get a copy of emails that assessments are due, supervisors are not required to sign off on them. You do need to sign:

1. Person Centered Plans
2. Periodic Reviews

Make it a habit to review your signature queues daily. Make sure the Person Centered Plan covers all the identified areas of need in the assessment, that it is written using the clients own words, and the services offered are based on client need. All the elements of the plan must be complete: the pre-planning record, documentation of the meeting itself, outcomes and if needed, an interim plan, and periodic review.

You may need to counter sign documents for staff who are not fully privileged (staff on six month probation, students, etc.)

Authorizations

Daily go through your “Approve Authorizations” queue. It is your responsibility to assure that the authorizations are supporting the Person Centered Plan (and that all the needs identified in the plan are authorized). If needed have the staff update the plan, get a copy to the client and then approve the authorization.

Any staff or external provider can request an authorization. If it is other than the assigned case manager or supports coordinator, make sure to share the request with the assigned staff, make sure the PCP supports the request, then approve the request.

Clients in supported living or specialized living will also have budgets on the system for supervisors to review prior to sending on to the Program Administrator for approval.

Reports

There are a number of reports designed to help you manage all the requirements of you and your staff. Currently located on <http://wewcho/default.aspx> the reports are being moved to Encompass for easier and better access by staff. Some particularly useful ones are located in the PCP section:

1. [CSTS Clients with Missing or Expired PCP](#)
2. [Staff Service Indicator - % Current PCP](#)
3. [Annual Clinical Documentation Report](#)

In the audit section is a number of reports looking at the completeness of each document required in Encompass. In the Health and Safety section are a number of health alert reports. It is good practice to review these reports prior to supervision with your staff to assess the status of their record keeping, and to make sure any appropriate referrals have been made.

Help

The red HELP button in Encompass contains current documentation about Encompass. The best help is to ask for another supervisor to be your mentor.

Vacation coverage

When you have a vacation or other extended absence from work planned, send a notice to Angie (zandera@ewashtenaw.org) prior to your absence. Let Angie know the date you are leaving, the date you are returning, the teams you supervise and who will be covering your team(s) in your absence. Be sure to cc the person who is covering for you. Be sure you have taken care of all documents waiting signature and authorizations requiring approval prior to your departure.