CAPITAL CONSORTIUM

Rev. 7/29/25

<u>Long-Term Care (LTC)</u>

<u>CASE MANAGEMENT and CALL CENTER processes</u>

<u>Evaluate casework to better manage your time.</u> Review newly assigned applications to determine how long they will take to process. Plan ahead and prioritize according to dates (oldest first) and complexity.

Priorities during PT (protected time): *10/20/30 lists, worker action items, dashboard items that are due; working oldest to newest items first.*

<u>Need additional PT</u>? Email: *HSEACCMonitoringTeam@countyofdane.com* and CC Supervisor(s); <u>subject line</u>: *EBD/LTC <county>*; <u>body of email</u>*:* include *RFA/Case #, a brief description and whether or not it is a spousal.*

When finished, return to “on queue” status in Genesys.

<u>Case Comments</u> are <u>very important</u> for other workers who touch the case to understand what type of case it is and what it is pending for. <u>Be specific</u> and use ALL CAPS to highlight important things like: ASSET ASSESSMENTS, POTENTIAL DIVESTMENT, SPOUSAL APP, 1^{ST} YEAR SPOUSAL RENEWAL, and LTC/WAIVER APP.

<u>Call center:</u> Calls that are **<u>complicated</u>** in nature and regarding LTC should be routed to the county of residence (i.e., documents related to asset assessments, divestments, spousal, LTC or waiver applications). If the applicant needs a new application, *minimally* you need to set the filing date.

<u>For these situations email:</u> *HSEACapitalLeads@countyofdane.com*; <u>subject line</u>: *LTC <county of residence>*; <u>body of email</u>: *include RFA# and the type of LTC program they are applying for, and whether or not it is a spousal; include case# and brief description of action needed.*

The lead in the appropriate county will either schedule an appointment or contact the assigned ESS for follow-up.

For all cases that have simple/standard documents attached and you take a call (i.e., REP/ address changes, changes to assets held, explanation of benefits open or closed etc.) to process, <u>ESS are expected to adhere to the one-touch approach.</u> (These should not be referred back to assigned worker.) If you have questions, please use your lead or the leads line.

<u>Project work</u> will occur when calls are manageable and will typically consist of SMRFs, Renewals, Discrepancies and Documents.

Documents related to *asset assessments, potential divestments, and LTC/waiver* ***applications*** <u>should only processed by the assigned ESS</u> and <u>can be skipped.</u>