

Department of Public Health
and Human Services

Section:
Application Processing

HEALTHY MONTANA KIDS

Subject:
Case Notes

Supersedes: **New to HMK Manual**

General Rule – Case Notes are part of a family’s file and, therefore, a legal document. Case Notes must be well written (spelling, grammar and punctuation are important) and in sufficient detail for anyone reviewing the notes to determine the reasonableness and accuracy of the action taken. Case Notes are required for any issue that is not fully explained by the entry on the appropriate CHIMES screen. Case Notes should explain any questionable, unusual, or complex situation.

CHIMES information, including Case Notes, is available to the family upon request. Additionally, Case Notes have the potential of being a legal document, so only facts related to the file are included in Case Notes.

WHEN TO ENTER CASE NOTES

CHIMES Case Notes are entered when:

1. HMK receives an e-mail or phone call regarding the application or a child’s eligibility status from:
 - a. a family member;
 - b. an Office of Public Assistance (OPA); or
 - c. party of interest (medical provider).
2. HMK places a call or e-mails:
 - a. the applicant or other family member;
 - b. an OPA; or
 - c. a party of interest (medical provider).
3. more information is needed from the family (enter what information is needed);

EXAMPLE: Left a voice message on the family’s home phone. Need verification of Joe’s self-employment income.

4. a process was complex or needs clarification so others will understand the steps taken and/or eligibility determination;

EXAMPLE: The applicant provided copies of pay stubs which did not correspond with information entered on the application. I used information from the pay stubs to determine financial eligibility.

5. the HMK eligibility determination is different than the CHIMES suggested determination (e.g., current monthly income exceeds Healthy Montana Kids *Plus* (HMK *Plus*) guidelines); or
6. a child is enrolled out of order from the waiting list.

EXAMPLE: Kellee was placed on the waiting list because she's HMK eligible based on the application received from her father. She is enrolled under her mother's file until the end of the month. To ensure she has no break in coverage, Kellee was enrolled out of order from the waiting list.

WHAT TO ENTER IN CASE NOTES

When entering Case Notes, maintain a high level of respect and professionalism and:

1. enter information in a timely manner (while details are fresh);
2. enter only "need to know" information;
3. indicate direct quotes from individuals;
4. only use agreed upon acronyms and abbreviations; and
5. ensure information entered is objective versus subjective.

NOTE: An objective case note is one written by treating or dealing with the facts without distortion by personal feelings or prejudices. Case Note information can include statements an individual (both family and HMK staff) made.

EXAMPLE: Angel's grandmother called about the status of her son's HMK application. I explained I could not discuss the status of any application with her. She ended the conversation by hanging up on me.

ABBREVIATIONS & ACRONYMS

The following are abbreviations and acronyms that can be used when writing notes:

- number

@ - at

\$0 - zero

1st – first

2nd – second, etc.

Amt – amount

App – application

Auto NB or AN – Medicaid automatic newborn coverage

Ave – avenue
Avg – average
BCBS – Blue Cross and Blue Shield
Cld – called
CMHB – Children’s Mental Health Bureau
Co – company
CSHS – Children’s Special Health Services
Ct – court
DDS – dentist
DOB – date of birth
Dr – drive
Dx - diagnosis
EDP – Extended Dental Plan
e.g. – for example
Eff – effective
Elig – eligible or eligibility
Etc – etcetera
FTC – failure to comply
HH – household
Hr – hour
Hrs – hours
Hwy – highway (cannot be used in the address due to postal regulations)
IMD – Institution for Mental Disease
Inc – incorporated
Info – information
Ln – lane
MA – Medicaid (formerly known as Medical Assistance)
MD – physician
MMIS – Medicaid Management Information System
Mo – month
Months of the year (Jan, Feb, etc)
Msg – message
MT – Montana (all states can be abbreviated)
OPA – Office of Public Assistance
PC or pov child – Medicaid poverty child coverage
PE – Presumptive Eligibility
Pd – paid
Pg – page
Prov enroll – provisional enrollment or provisionally enrolled
PS or pov 6 – Medicaid poverty six coverage
QE – Qualified Entity
Qtr – quarter
Qtrly – quarterly
Re app – renewal application
Rec’d – received
Rqstd – requested

Rx - prescription
SED – serious emotional disturbance
Sig – signature
SSDB – social security disability benefits
SSDI – social security disability insurance
SSI – social security income
SSN – social security number
SSP – Supplemental Service Program administered by the Children’s
Mental Health Bureau
St – street
UI – unemployment insurance
VA benefits – veterans administration benefits
w/ - with
Wk – week
Work comp – workers compensation
Years can be abbreviated (07, 08, etc.)
Yr – year

NOTE: “4” can be used in place of the number ‘four’ but cannot be used in place of the word ‘for.’

o o o