

Lancaster Drug & Alcohol Commission Case Management & Clinical Services Policy & Procedure Manual	CMCS # 17B Policy: Recovery Plan/Case Management Service Plan
Most Current Revision: 05/19/2023 Effective Date: 07/01/2020	Page: 1 of 2

I. Purpose:

To establish guidelines for the completion of the Recovery Plan/Case Management Service Plan and the Recovery Plan/Case Management Service Plan updates as part of the recordkeeping protocols required for the Case Management services.

II. Procedure:

A. Recovery Plan/Case Management Service Plan

a. When an individual **DECLINES** the offer for care coordination services

- i. Individuals have the option to decline participation in the care coordination case management service activity.
- ii. If/when an individual declines care coordination services, the Case Management Service Plan will NOT be completed with the individual.
- iii. HOWEVER, the Case Manager MUST document ON THE Case Management Service Plan that the individual is NOT interested in receiving care coordination services.
- iv. In the individual's ENCOUNTER NOTE it must include
 1. The individual declined the care coordination services.
 2. What efforts were employed to engage the individual?
 3. The rationale/reasoning for the individual declining care coordination services
 4. The individual was informed that they may elect to receive care coordination services at any time AND what steps they would take to obtain these care coordination services.

b. For those individuals who **voluntarily ELECT TO PARTICIPATE** in care coordination services, the Case Management Service Plan/Recovery Plan MUST be completed as follows:

- i. At the time of the LOCA (if this is when the individual chooses to have care coordination services).
- ii. At any time, the individual requests to have care coordination services.
- iii. UPDATED thereafter, at a minimal, every 60 days throughout the duration of the individual's involvement with care coordination services OR less than 60-day intervals if indicated in the contracted providers policy time frame.
- iv. Encounter notes

1. Must be written for **every activity** (including the creation of the Recovery Plan/Case Management Service Plan; Updates to the plans) during the entire course of the Case Management service episode
2. At each and every activity with the individual, an encounter note is to be completed.
3. Only the ADMIT & DISCHARGE encounter notes MUST be entered into WITS.
4. All other encounter notes do not need to be entered into PA WITS **ONLY IF** those notes are being maintained in another type of file **AND** can be produced for review upon request by LCDAC.

Approved By:



Rick Kastner LCDAC Executive Director

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Date