

FOOTHILLS GATEWAY, INC.

Electronic Paperwork – Case Management

PROCEDURE:

In order to facilitate the efficient exchange of individual information, Foothills Gateway Case Management accepts and distributes specified information through electronic mail.

Sending Paperwork to Foothills Gateway:

- Service providers should send the following paperwork electronically to the Foothills Gateway Case Management designated email for SP Tracking:
 - Annual Assessments
 - Satisfaction Surveys
 - Progress Summaries
 - ISSPs
 - Health and Safety Plans and Assessment
 - Health and Safety Reviews
 - Monitoring Follow-up Form

Data Technicians will track the documents and forward the paperwork to the Case Manager, and the individual's Virtual File.

- Documents will be sent to the following email address:
foothillspaperwork@foothillsgateway.org
- In order to ensure program and printing compatibility, all documents must be sent in a .PDF format.
- Files should be titled in this format:
Last Name, First Initial.Service Provider Name.Document Title.Date
Example: *Smith, J.XYZAgency.AnnualAssessment.12-5-2010.pdf*
- Using the same format, all Residential or Day Program documents should be identified using RES or DP in the title:
Last Name, First Initial.Service Provider Name.Document Title DP or Res.Date
Example: *Smith, J.XYZAgency.ISSP-DP.12-5-2010.pdf*
- An email should contain document attachments for a single individual and should be sent in a secure format.
- Paperwork for Service Plan (SP) meetings should be sent a minimum of three days in advance of the Service Plan meeting.

- All other paperwork should be sent via secured email to Case Managers directly. Case Managers will send these documents to the individuals Virtual File.

Examples

- Comprehensive Life Review
- Functional Analysis
- Safety Control Procedures
- PNF forms
- Annual Physicals/ Medical evaluations
- PAR worksheets

Paperwork Sent from Foothills Gateway:

- Foothills Gateway will send paperwork electronically to a single, designated email address.
- PASAs must provide Foothills Gateway's Administrative Office Manager their designated email address.
- The following paperwork will be distributed electronically:
 - Annual Service Plans and DD Sections
 - Service Plan Revisions
 - PARs
 - Special Staffing
 - Monitoring Forms
 - Resource Allocation Committee Forms
 - SOS – Schedule of Services
 - Financial Page
- Documents distributed electronically by Foothills Gateway will be sent in a secured email and in a .PDF format.
- All document files should be titled in this format:
Last Name, First Initial.Service Provider Name.Document Title.Date
Example: *Smith, J.XYZAgency.AnnualAssessment.12-5-2010.pdf*
- The secure email will contain document attachments for a single individual, and the individual's name will appear in the subject line of the email.
- Documents will be sent from the following email address:
[\[senders name\]@foothillsgateway.org](mailto:[senders name]@foothillsgateway.org)

3/11. . . . 7/15; 10/17; 12/17