

# 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 can 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

Case Management Admin 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](mailto: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 in order to assure the case manager has it prior to 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
  - State SLS PARs
  - 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. ... 12/22; 11/23; 3/24