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**Policy Area:** Wraparound (REACH,  
 O'YEAH)-Administration

References:

## #003- Care Coordinator / Transition Coordinator / Lead Care Coordinator Qualifications and Responsibilities

### POLICY

To maintain the integrity of the Wraparound process and ensure quality community-based care to the youth and families of Wraparound Milwaukee, it is the policy of Wraparound Milwaukee that all agencies providing care coordination for our network adhere to the following guidelines and procedures.

*NOTE: This policy utilizes the term "Care Coordinator", which applies to Wraparound and REACH Care Coordinators and O-YEAH Transition Coordinators. It also uses the term "Child and Family Team" - which applies to any group of people that may be working with a family or young adult. The term "Youth" is used in this policy and applies to the enrollee in the program, whether a child, adolescent, or young adult. "Plan of Care Meeting" also applies to any meeting that may occur to address the needs, strengths, progress, etc., of a family and "Plan of Care" - which also applies to Treatment Plan or the Future Plan for O-YEAH enrollees.*

### PROCEDURE

#### A. Qualifications

1. Care Coordinators must possess at minimum a bachelor's degree, preferably in the areas of education, human services or a related field. One year of experience working in a setting providing mental health services is required. Related life experience and volunteer work will be considered. Only coursework and degrees from accredited schools shall be recognized, as they may appear on either the United States Department of Education, Office of Postsecondary Education (<https://ope.ed.gov/accreditation>) or the Council of Higher Education Accreditation (<http://www.chea.org/search/>) databases.
2. Lead Care Coordinators must meet the above standard and have at least one year of Care Coordination experience with Wraparound Milwaukee. Care Coordinators being promoted to a Lead position must be approved by Wraparound Milwaukee Associate Director (or designee) in writing prior to a promotion occurring.
3. Masters degree Care Coordinators must have a Master degrees in an education or human services field to qualify for the Master's Level rate. It is the intention that this higher rate be passed on to these staff through a pay increase from the agency in order to promote staff retention. The rate for Care Coordinators will change beginning the month following their graduation from the eligible

Master's Degree program or the month Wraparound Milwaukee is notified of the change, whichever is later. Agencies will need to submit an "Add Slip" to the Wraparound Provider Network with the required documentation prior to Wraparound Milwaukee approving the Masters Degree service rate for a Care Coordinator.

4. Before the Care Coordinator begins to provide services, the Care Coordination Agency will need to complete and submit the ADD NEW CARE COORDINATOR form (*see Care Coordination Frequently Used Forms*) to the Wraparound Milwaukee Provider Network. A completed 3-part background check and the Care Coordinator's credentials are to be submitted with the ADD NEW CARE COORDINATOR form. The Care Coordinator's name is added to Synthesis (Wraparound Milwaukee's Information Management System) as a provider of Care Coordination services after their credentials/qualifications have been verified and approved by Wraparound Milwaukee. Agencies will be notified in writing (via letter or email) if an individual is ineligible to be a Care Coordinator. Agencies should allow 2 to 3 business days for Wraparound Milwaukee to complete the credential review process. Once the Care Coordinator begins employment, they must complete and submit an APPLICATION FOR SYNTHESIS LOGIN ID AND ACCESS form (*see Care Coordination Frequently Used Forms*) in order to receive a Synthesis Login ID. The completed (signed and dated) APPLICATION FOR SYNTHESIS LOGIN ID AND ACCESS for can be uploaded to Synthesis or faxed to the Wraparound Milwaukee Administrative Office – attention Synthesis Help Desk. Access to Synthesis will not be available until this form is received.
5. It is the Agency's responsibility to complete a background check on all potential employees in adherence to the Wraparound Milwaukee Caregiver Background Check Policy DHHS-001, the County Board's Resolution regarding background checks and the Wisconsin Caregiver Law.
6. It is the Agency's responsibility to maintain the employee's file, which includes the Care Coordinator's resume, proof of qualifications, all background check information, a copy of a valid driver's license as verified through completion of a Driver's Abstract and proof of current auto insurance. All of this information must be maintained in Synthesis. Wraparound Milwaukee maintains the right to periodically audit Agencies to assure adherence.

## B. Training

1. All Care Coordinators must become certified to provide care coordination for Wraparound Milwaukee by completing **all required training modules as identified by Wraparound Milwaukee**. It is highly encouraged that all Care Coordinators also attend a Family Luncheon within 6 months of their hire date. The certification training will be held at least twice a year. Once a Care Coordinator has been hired, it is the Agency's responsibility to have the employee complete the required training **in its entirety within the first six (6) months of hire** to continue to receive youth and families from Wraparound Milwaukee. Transition Coordinators must complete an additional twenty-four (24) hours of ongoing training each year (12 hours every 6 months).
2. To honor our commitment to providing quality care to youth and families, as well as meet the needs of the Care Coordinators, Wraparound Milwaukee will offer ongoing trainings/Care Coordinator meetings on a variety of topics as needed, most of which will be mandatory.

## C. Duties and Responsibilities

1. Newly hired Care Coordinators can only be assigned four (4) families in Wraparound, six (6) families in REACH or seven (7) young adults for O-YEAH during his or her first two (2) months of employment. Exceptions may be made for returning Care Coordinators or transfers from one Care Coordination Agency to another, but **must be granted in writing via email by Wraparound**

**Milwaukee Administration PRIOR to assignment of additional families.**

2. Care Coordinators that are going to be an informal support on a Child & Family Team need to inform their Agency Supervisor and Wraparound Milwaukee Administration.
3. **Caseload Size and Contact**
  - a. **For Wraparound:** The Care Coordinator maintains a caseload of 8 families with a minimum of 14 hours of service contact per month per family to include weekly face-to-face contacts with the youth and family. For those youth in out-of county placements (more than one hour outside of Milwaukee County), Care Coordinators are required to have bi-weekly face-to-face contact at the out-of-county placement and weekly phone contact with these youth. This is in addition to the weekly face-to-face contacts that are occurring with the family who resides in Milwaukee County.
  - b. **For REACH:** The Care Coordinator maintains a caseload of 12 families with a minimum of 8 hours of service contact per month/per family to include bi-weekly face-to-face contacts with the youth and family. For youth enrolled in REACH in out of home care, the Care Coordinator is expected to maintain weekly face-to-face contacts with the youth and family and are required to have bi-weekly face-to-face contacts if the youth is at an out-of-county placement (if more than one hour outside of Milwaukee County) and weekly phone contact with these youth . Care Coordinators who provide service for those youth enrolled in CORE will follow the same expectations as REACH, except their caseload will be that of 14.
  - c. **For O-YEAH:** The Transition Coordinator maintains a caseload of 14 young adults with a minimum of 6 hours of service contact per month to include bi-weekly contact (face-to-face or phone) with at least one contact a month being face-to-face.
4. The Care Coordinator must assemble a Child & Family Team within two (2) weeks of enrollment by interviewing the youth/family, identifying family members/natural supports/agency representatives and other significant persons. This includes uncovering the youth's/family's strengths and Needs, and providing assistance with any immediate needs. The Care Coordinator collaborates with other necessary individuals the youth and family may have contact with, such as informal/natural supports, Ongoing Case Managers, Human Service Workers, Judges, District Attorneys, Attorneys, Teachers, Physicians, etc. This means that the Care Coordinator contacts these key people by telephone frequently, invites them with **adequate** (2 weeks or more) notice to Child & Family Team and Plan of Care meetings, and provides them with copies of the Plan of Care within two weeks from the date that the POC meeting was held.
5. The Care Coordinator adheres to conducting a Child & Family Team to develop the Plan of Care in adherence to the Plan of Care Policy set forth by Wraparound Milwaukee (*refer to Wraparound Policy #028- Plan Of Care (POC)*).
6. The Care Coordinator must monitor the provision and quality of services provided to the youth and family through the Child & Family Team and is the liaison when new services/resources need to be sought or developed. The Care Coordinator seeks community resources first with the assistance of the Team and modifies the Service Authorization Request (SAR) whenever services or resources need to be added and/or deleted.
7. The Care Coordinator provides or arranges for transportation for youth and families to appointments, crisis/respite services, etc., if needed. Care Coordinator's driver's license and auto insurance with adequate coverage must be kept up to date.
8. The Care Coordinator provides or secures support and crisis/emergency services for the youth/

family. This may be done through face-to-face contact, phone contact or availability by an on-call system.

9. The Care Coordinator completes all the necessary paperwork in a strength-based manner per Wraparound Milwaukee/Agency requirements. The Care Coordinator maintains accurate information within the electronic medical record, Synthesis, ensuring that family demographic information is always current.
10. The Care Coordinator must not post any client identifying information on any web-based social networking sites (i.e., Facebook, Twitter, etc.) and is cautioned to use discretion with the information they may be posting on themselves.
11. The Care Coordinator is knowledgeable of and adheres to all relevant Wraparound Milwaukee Policy and Procedures.
12. The Care Coordinator engages in any and all quality assurance and quality improvement activities identified by Wraparound Milwaukee.

**D. Roles and Responsibilities Specific to Children's Court** (*Also see Court Appearance Policy #012*)

1. Provide written and verbal information related to the youth's and family's behavioral and mental health based on assessment and family contact. This information will include the youth's and family's strengths and competencies, progress or lack of progress toward those court conditions that are mental health related, as well as report on the services and supports put in place to assist the family.
2. Provide a comprehensive community-based safety plan with innovative strategies to assist the youth in being maintained safely in the least restrictive setting.
3. Make every attempt to meet with significant parties, such as attorneys, human service worker, ongoing worker, etc., before court to discuss upcoming hearings and plans for the youth and family that will be presented in court.
4. Advocate for the youth and family to be heard in the court process and to enhance the awareness of mental health needs, diversity and culture.
5. Always be accountable and follow through on court order and conditions.

**E. Additional Duties and Responsibilities of Lead Care Coordinators**

The Lead Care Coordinator position may carry a maximum caseload of four (4) families in Wraparound Milwaukee, six (6) families in REACH, or seven (7) young adults in O-YEAH. Additionally, they are expected to carry out the following duties:

1. Role model and coach on the Values and Principles of the Wraparound Process.
2. Assist the Supervisor with providing support, feedback and problem solving with Care Coordinators, as needed.
3. Act as a trainer in conjunction with the Supervisor to teach the Wraparound Process to new and existing staff.
4. Instruct new staff regarding Wraparound Milwaukee policies and procedures and maintain follow through on policies with existing staff.
5. Provide coaching for staff by attending Court hearings and/or Child & Family Team Meetings.
6. Help plan and conduct Agency team meetings and trainings.
7. Attend Wraparound Milwaukee Supervisor's Meetings with the Supervisor or as a backup, if the Supervisor is unable to attend.

8. Review and approve documentation for accuracy and strength-based language (including Progress Notes, Plans of Care, Out-of-Home Care Authorizations, Transitional/Disenrollment Plans, and Crisis Plans for youth and families).
9. In conjunction with Supervisor, utilize reports and data provided by Wraparound Milwaukee to continuously improve the care provided to youth and families.
10. Other duties as assigned by Supervisor.

**Attachments:**

No Attachments

**Approval Signatures**

Step Description	Approver	Date
	Michael Lappen: 11008000-BHD Administrator	1/10/2018
	MaryJo Meyers: 11003003-Director Wraparound Program	1/9/2018
	Pamela Erdman: 12008005-Placement Resources Manager	1/8/2018
	Dana James: 21011004-Quality Assurance Coordinator	1/5/2018

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