1. 14 days prior to enrollment day, Inside sales sends out:
   1. Medicaid letter - New Client - to those with patient liability – No Rep Payees
   2. Private Pay letter to PP
      1. PP Notification Form
      2. Privacy Notice
      3. Return Envelope
   3. Zero Liability letter to SSI along with (only if new client):
      1. Medicaid Notification form
      2. Consent form for TN only
      3. Privacy Notice
      4. Return Envelope
2. 10 days prior to enrollment day, Inside sales sends out postcard reminder.
   1. Medicaid postcard to those with patient liability
   2. Private Pay postcard to PP
3. Phone Approval Packet
   1. Copy of Completed Notification Form
   2. Payment Information Form
   3. Privacy Notice
   4. Return Envelope
4. Insurance Intro Letter Rep Payee
5. After Enrollment day packet Medicaid
6. After Enrollment day packet PP
7. no Enrollment day packet Medicaid
8. no Enrollment day packet PP
9. For any Medicaid individual with $0 patient liability and no enrollment day
   1. Cover Letter (Intro Medicaid $0)
   2. Notification Form (Medicaid)
   3. Consent form for TN only
   4. Privacy Notice
   5. Return Envelope
10. No Enrollment Day Postcard (Medicaid)
11. No Enrollment Day Postcard(PP)

Task: 1st prior to enrollment day packet

Start Criteria: When enrollment day date is inserted into facility tracker

Start Date: 14 days prior to enrollment day

Who is involved: Private Pay, Patient liability, and SSI

End Criteria: When users has successfully hit mail packet to all residents on the list

Task: 2nd prior to enrollment day packet

Start Criteria: When enrollment day date is inserted into facility tracker

Start Date: 10 days prior to enrollment day

Who is involved: Private Pay, Patient liability

End Criteria: When users has successfully hit mail packet to all residents on the list

Task: Initial POA Call

Start Criteria: When enrollment day date is inserted into facility tracker if facility needs confirmation to sign - (If no enrollment day date is inserted ???!?!?)

Start Date: ???? Unknown

Who is involved: All residents

End Criteria: When users has successfully called every financial poa on facility list and put a status of accepted, declined, or callback??? or approval over phone ???

Task: Followup POA Call

Start Criteria: After initial POA Call or Followup POA Call if there are residents in callback category

Start Date: ???? Unknown ??? Day after initial POA Call

Who is involved: All residents in callback category

End Criteria: When users have successfully called every financial poa on facility list and put a status of accepted, declined, or callback?????

Task: Confirmation from POA Call

Start Criteria: After all residents in facility either accepted or declined

Start Date: ???? Unknown ??? day after initial POA Call??

Who is involved: All residents who confirmed

End Criteria: When successfully mailed/ emailed/faxed ??? Rep Payee Insurance Confirmation form to "Area Manager"

Task: Rep Payee Call

Start Criteria: When Rep Payee Call Date/Time placed in facility tracker

Start Date:Rep Payee Call Date/Time placed in facility tracker

Who is involved: All confirmed residents

End Criteria: All residents are confirmed with facility

Task: Post Rep Payee Call Insurance Intro Letter

Start Criteria: When Rep Payee Call task finished

Start Date: ?? Day after rep payee call task finished ?

Who is involved: All signed up residents

End Criteria: All resident POAs sent insurance Intro Letter Rep Payee

Task: Introduce Insurance POA Call or Follow up on packets call

Start Criteria: When Enrollment Day or Non-Enrollment Day Packets are sent out

Start Date: One Week after task is created

Who is involved: All signed up residents

End Criteria: When users has successfully called every financial poa on facility list and put a status of accepted, declined, or callback?????

Task: Introduce Insurance Follow-up POA Call

Start Criteria: When Introduce Insurance POA call completed

Start Date: One day after task completed ??

Who is involved: All signed up residents

End Criteria: Successfully called every financial poa on facility list and put a status of accepted, declined.

Task: send Enrollment day packet

Start Criteria: enrollment day entered into facility or "no enrollment day" inserted

Start Date: Day after enrollment day or 3 days after no enrollment day postcard completed

who is involved: all residents not signed up residents

End Criteria: all involved residents mailed packet

Task: no enrollment day post card

Start Criteria: No enrollment day entered into facility

Start Date: Immediatly

Who is involved: all medicaid / PP patients

End Criteria: All residents mailed packet