



# SA Case Management

1. SA Case Management (65D-30) Does the Overdose Prevention Plan include information regarding: 1. Education about the risks of overdose, including having a lower tolerance for opioids if the individual is participating in an abstinence-based treatment program or is being discharged from a medication-assisted treatment program. 2. Information about Naloxone, the medication that reverses opioid overdose, including how to use Naloxone and where and how to access it.
2. SA Case Management (65D-30) Does the provider have an overdose prevention plan? All staff must have a working knowledge of the overdose prevention plan.
3. SA Case Management (65D-30) If the provider maintains an emergency overdose prevention kit (i.e. Naloxone) are they able to provide evidence that they have developed and implemented a plan to train staff in the prescribed use and the availability of the kit for use during all program hours of operation?
4. SA Case Management Cx Consent (65D-30) Informed consent for services signed by the client prior to or upon placement.
5. SA Case Management Cx Consent (65D-30) Informed consent for a drug screen, when conducted;
6. SA Case Management Cx Demographics (65D-30) Name and address of client and referral source;
7. SA Case Management Cx Dx (65D-30.0044 (a)) Discharge Summary. A written discharge summary shall be completed for individuals who complete services or who leave the provider prior to completion of services. The discharge summary shall include a summary of the client's individual's involvement in services and, the reasons for discharge, and the provision of and referral to other services needed by the individual following discharge, including aftercare. The discharge summary shall be completed within 15 business days and signed and dated by a primary counselor.
8. SA Case Management Cx ROI (65D-30.004(13) 42 Code of Federal Regulations, Part 2.) (1) Program permitted to make the disclosure,  
(2) Individual/organization to which the disclosure is to be made,  
(3) Purpose of the disclosure,  
(4) How much and what kind of information to be disclosed,  
(5) Signature & date of client/guardian (May be signed by the individual only if the form is complete)  
(6) Statement that consent is subject to revocation at any time,  
(7) Expiration Date of consent
9. SA Case Management Cx Screening (65D-30) Screening information;
10. SA Case Management Cx Services (65D-30) On-going assessment and monitoring of the client's condition and progress?
11. SA Case Management Cx Services (65D-30) Linking and brokering for services as dictated by client needs?
12. SA Case Management Cx Services (65D-30) Evidence of follow-up on all referrals for other services?



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13. SA Case Management Cx Services (65D-30) Case manager meets face-to-face with each client at least monthly unless otherwise justified in the client record?
14. SA Case Management Cx Transfer (65D-30.0044 (b)) Transfer Summary. A transfer summary in accordance with policies and procedures shall be completed immediately for individuals who transfer from one (1) component to another within the same provider and shall be completed within 5 calendar days when transferring from one (1) provider to another. In all cases, an entry shall be made in the individual's clinical record regarding the circumstances surrounding the transfer and that entry and transfer summary shall be signed and dated by a primary counselor within 15 days.
15. SA Case Management Orientation (65D-30) Is overdose prevention information (1. Education about the risks of overdose, including having a lower tolerance for opioids if the individual is participating in an abstinence-based treatment program or is being discharged from a medication-assisted treatment program. 2. Information about Naloxone, the medication that reverses opioid overdose, including how to use Naloxone and where and how to access it.) shared with individuals upon admission?
16. SA Case Management Wait List (65D-30) Is overdose prevention information (Education about the risks of overdose, including having a lower tolerance for opioids if the individual is participating in an abstinence-based treatment program or is being discharged from a medication-assisted treatment program.2. Information about Naloxone, the medication that reverses opioid overdose, including how to use Naloxone and where and how to access it.) offered to individuals placed on a waitlist to receive treatment services?