



Case Manager Recommendation

Recommendation from Case Manager for Initial Placement in County Funded Long Term Care (LTC) Facility

Note: To be completed by client's community case manager. It is not to be completed by the hospital/facility.

Please fax completed form to Optum at (888) 687-2515 or secure e-mail form to ltc.faxes@optum.com.

Name of Client:	Name of Case Manager/Program:		
Case Manager Phone:	Case Manager Fax:	Date:	

1. Recommended County Funded LTC Level of Care

☐ MHRC/STP ☐ County Funded SNF ☐ SNF Patch ☐ NBU Patch ☐ State Hospital

Reason for Recommendation to this Level of Care:

Explain how clients meet LTC Exception Criteria if they do not meet LTC criteria for recommended program level:

2. How Long have You Known this Client?

3. Complete the Following Risk Assessment

Risk Factors	Weak	→ Strong			
Weak to Strong	1	2	3	4	5
Suicidal Risk	☐	☐	☐	☐	☐
Risk of AWOL from Locked Placement	☐	☐	☐	☐	☐
Assaultive Risk	☐	☐	☐	☐	☐
Drug/ETOH Risk	☐	☐	☐	☐	☐
Sexual History Risk	☐	☐	☐	☐	☐

Explanation of any Risk Factors Rated 4 or 5 and any Historical Risk Factors

Dangerous Propensities

4. Provide information on client's living situation and hospitalizations over the past year. (This can be a copy of the placement information in the client's chart or a brief narrative that includes information on hospitalizations and placements in board and cares, independent living situations, hotels, etc.)

5. Client's Income

Source	Amount
☐ SSI	
☐ SSA	
☐ Other:	
☐ Other:	
☐ Payee:	

If you are unsure of a client's income status, note and indicate what steps are being taken to obtain information, instate, or reinstate benefits

6. (Complete if applicable.) The County requests that a client's Case Manager verify their agreement to assist with the SSI benefit process when a client is unfunded in order to qualify for LTC Placement.

Please check the items below to confirm your agreement to follow up:

- ☐ The client's case management program will submit an SSI application or confirm that an application is pending.
- ☐ The client's case management program will provide follow up on the application process, including status of denial and appeals, to the LTC Program.
- ☐ Once SSI is granted, the client's case management program agrees to assist the client in obtaining a payee and setting up share of cost payments.

7. Additional comments (Optional):