



Virtual Chart

Case Management Software
for Regional Centers
Since 1998

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Consumer and Family Focus

- What are the tools required to have a meaningful discussion regarding services and supports?
- Consumer history of services and supports
- Automate documentation requirements: reports, forms and compliance monitoring

Person Centered Plan / Individual Program Plan / Annual Review

- Medicaid Waiver audit focus
- Client Development Evaluation Report deficits match Person Centered Plan deficits
- Purchase of Service Information – extracted from Uniform Fiscal System
- Imaging

Targeted Case Management

Title XIX volume

- Case Managers must document all their activities
- Orange County documents over 100,000 units per month, highest volume of any regional center
- Title XIX reminders

Purchase of Services Monitoring

- Review Team – interdisciplinary consultation for all services
- Data driven – information from multiple databases consolidated for review plus history of services requested and purchased
- Generic resources, Medi-Cal, CCS, IHSS, etc.
- Consumer satisfaction - National Core Indicators Project

Resources

- Same functionality as consumer side
- Risk management – federal health and safety concerns
- Annual Review checklist
- Corrective Action Plan
- Special Incident Report

Compliance/Audit Features

- Automatic tickler
- Productivity reports
- Data integrity – reporting and auditing features
- Virtual Chart as knowledge base

Offline Processing

- Productivity is not dependent upon connectivity
- Each Case Manager has his/her database, synchronized with server on demand
- West Office lost wide area network connection for eight days – everyone kept working

Federal Funding Focus – Medicaid Waiver

- Added 441 consumers to the Medicaid Waiver in nine days (Consumer signs)
- What is the process without Virtual Chart?
- Client Development Evaluation Report
- Medicaid Waiver eligibility form
- Other automated forms – Medicaid Waiver recertification
- No coding required – new Case Manager can create form