



## Checklist for a New Consumer

When a Consumer has chosen In-Home Services with a Homecare Worker (HCW) as their service option, use the following checklist to ensure all steps have been completed:

- Consumer has selected an approved Provider
- Case Manager reviews OR PTC DCI options available and requirements for each with the Consumer/Consumer Employer Representative (CER) and Provider using the **Options Tech Comfort Level QRG** or **Which OR PTC DCI Option is Right for Me QRG**
- Consumer/CER and Provider discuss OR PTC DCI option that suits both of them (Consumer makes final decision)
- Case Manager narrates in Oregon Access they reviewed the options and narrates the Consumer's chosen option
- Case Manager completes the Service Plan and 546 and gives it to the Support Staff.
- Support Staff follows Add Consumer Information steps (1.3.1), and if needed, Add/Remove CER steps (1.4.1)
- Support Staff follows Managing Provider Accounts steps (1.2.1) to add a new Provider
- If the fob was chosen, Support Staff sends a request to the PTC Support Team (PTC.Support@dhsosha.state.or.us) to set up the fob for the Consumer