

# WAIVER CASE MANAGEMENT DECISION WORKSHEET

## Choosing the Right Case Management Agency for Your Family

Take your time working through this. There's no "perfect" choice—just the best fit for your needs.

### Step 1: What Matters Most to Us?

*Check off your top priorities.*

- Keeping our current case manager (if possible)
- Fast communication / quick responses
- Experience with our specific needs or diagnosis
- Consistency (low staff turnover)
- Local knowledge of providers and services
- Smaller caseloads / more personalized support
- Flexible availability (nights/weekends)
- In-person visits
- Virtual visit options
- Other: \_\_\_\_\_

### Step 2: Agencies We're Considering

<i>Agency Name</i>	<i>Contacted ? (Y/N)</i>	<i>Notes / First Impressions</i>
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_____		
_____		
_____		
_____		
_____		

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## Step 3: Comparing Agencies

*Use this section as you talk to each agency.*

Agency Name: \_\_\_\_\_

Do they have experience with our needs?  Yes  No  Unsure

Notes: \_\_\_\_\_  
\_\_\_\_\_

How easy are they to reach?

Direct contact  Main line  Unsure Response time: \_\_\_\_\_

Caseload size (if shared): \_\_\_\_\_

How do they communicate?  Phone  Email  Text  Portal  Other: \_\_\_\_\_

Visit frequency & type:  In-person  Virtual  Both

Details: \_\_\_\_\_  
\_\_\_\_\_

\_Availability outside business hours?  Yes  No  Limited

Notes: \_\_\_\_\_  
\_\_\_\_\_

What stood out about this agency? \_\_\_\_\_  
\_\_\_\_\_

Any concerns?  
\_\_\_\_\_  
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## Step 4: Quick Rating (Trust Your Gut)

<i>Agency Name</i>	<i>Comfort Level (1-5)</i>	<i>Would You Choose Them?</i>
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> Maybe <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> Maybe <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> Maybe <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> Maybe <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> Maybe <input type="checkbox"/> No

## Step 5: Final Thoughts

Which agency feels like the best fit right now? \_\_\_\_\_

Why? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Reminders

- You can change agencies at any time
- It's okay if your first choice isn't perfect
- Support matters—choose the team that feels right to you

## Need Help?

**Tendercare is here to support you through this process.**

We're happy to talk through your options and answer questions.

**Contact: Darcy Tower, Director of Advocacy & Community Relations**

Phone: (317) 251-0700 ext. 404 Email: darcy.tower@tchhs.net