

**SMMC Managed Care Plan Report Guide  
Case Manager Caseload Report Summary**

02/01/2025

**BENEFIT TYPE(S)**

The Managed Care Plan providing the following benefit type(s) must submit this report:

- IDD/MMA
- LTC
- MMA
- Specialty Product

**REPORT PURPOSE:**

The purpose of this report is to ensure that enrollees receiving LTC services are receiving quality case management services, by monitoring the caseload requirements.

**FREQUENCY & DUE DATES:**

Report Year Type	Report Year Period
C = Calendar	01/01 – 12/31

Report Frequency	Reporting Data Period
M = Monthly	Two-digit month of data being reported

This report is due within fifteen (15) calendar days after the end of the reporting month.

**REPORT CODE & SUBMISSION:**

<b>Report Code</b>	0151
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Using the file naming convention described in Chapter 2, the managed care plan must submit the required documentation to the applicable SFTP site, as specified in Chapter 2:

- Case Manager Caseload Report using the template provided.
- A report attestation as described in Chapter 2.

**INSTRUCTIONS:**

The Managed Care Plan must submit the Case Manager Caseload Report in the format and layout specified in the report template.

**VARIATIONS BY MANAGED CARE PLAN TYPE:**

No variations.

**REPORT TEMPLATE:**

The Agency templates can be found using the directions in Chapter 1. There are no additional report template instructions unique to this report chapter.

**AMENDMENT HISTORY:**

PLAN COMMUNICATION	DATE	RECAP OF CHANGE(S)
None	None	None