

FOOTHILLS GATEWAY, INC.

Transfers

PROCEDURE:

General Guidelines

Persons receiving HCBS-DD, Supported Living Services (SLS), Children's Habilitation Residential Program (CHRP) or Children's Extensive Support (CES) in Larimer County may decide to relocate to another area of Colorado and continue to receive services. In addition, persons receiving these same services in other areas of Colorado may wish to move to Larimer County and continue to receive services. Persons leaving the state of Colorado cannot take funding to another state.

For persons moving from Larimer County to another location in Colorado:

- The individual/family receiving either HCBS-DD, SLS, CHRP or CES will notify the Case Manager of their intent to re-locate. The Case Manager will document the individual needs and desire for ongoing services in the new community.
- The Case Manager and the File Room staff will work together to prepare a referral packet for the receiving Community Centered Board (CCB). There is a CCB transfer check list saved on the J Drive that should be used to help ensure we include all the important documents in the transfer packet.
- The File Room staff will send the Placement Coordinator the transfer packet.
- The Placement Coordinator will email the contact person at the CCB that the person is transferring to. The email will indicate that the HCBS-DD, SLS, CHRP or CES funding will be transferred. The Supports Intensity Scale (SIS) Level of funding will be included in the email for SLS or the DD waiver. The ICAP information will be included for CHRP transfers. The approval letter from Telligen and the word version of the CES application will be included for CES transfer packet.
- The transfer of funding for the DD Waiver will be included in a monthly report to Health Care Policy and Financing (HCPF).
- The Case Manager will assist the individual/family with visits, transition- planning meetings and will communicate with the receiving CCB to agree on a specific date for the funding transfer.
- The Case Manager will notify the Placement Coordinator of agreed upon transfer date.
- The Case Manager will send the 803 notice and put the new CCB on the BUS as a secondary agency (if funding is Medicaid).
- The Case Manager will need to enter the termination information in the Program Change Report Application.

To transfer a HCBS-DD resource out of Larimer County:

- The Case Manager will document the individual needs and desire for ongoing services in the new community.

- The Case Manager and the File Room Staff will work together to prepare a transfer packet for the receiving CCB along with details about the person, what services they are receiving, whether they are keeping the PASA the same or will need an RFP sent out to find a new provider and contact information.
- The Placement Coordinator will notify Health Care Policy and Financing (HCPF) of the plan to transfer.
- Transfers can occur any day during a month.
- The Supports Intensity Scale (SIS) is used to determine the level of funding. The support level is shared with the new CCB to assist in the development of services.
- HCBS-DD funding can include residential, day services, behavior and transportation services.
- The Case Manager will notify the Placement Coordinator of the official transfer date.
- The Case Manager will need to terminate the person in the Program Change Application.

To transfer Supported Living Services, Children’s Habilitation Residential Program or Children’s Extensive Support funding out of Larimer County:

- The Case Manager will document the individual needs and desire for ongoing services in the new community.
- The Case Manager and the File Room Staff will work together to prepare a transfer packet for the receiving CCB. There is a CCB transfer check list saved on the J Drive that should be used to help ensure we include all the important documents in the transfer packet.
- The SIS assessment, Support Level and evaluation information will be included in the referral packet for SLS only. The support level is used to determine the Service Plan Authorization Limit (SPAL).
- The approval letter from Telligen and the word version of the CES application will be included for CES transfer packet.
- For CHRP, the ICAP will be included in the transfer packet.
- An email from the Placement Coordinator to the receiving CCB as notification of a pending transfer of SLS, CHRP or CES funding.
- The Placement Coordinator will notify the appropriate Coordinators/Directors at FGI of the plan to transfer.

For persons moving into Larimer County from another location in Colorado:

- The Placement Coordinator will receive a transfer packet from an individual/family or from another Community Centered Board in Colorado.
- If initially contacted by the family, the Placement Coordinator will contact the CCB currently providing services to obtain confirmation of the proposed move and agreement to transfer the HCBS-DD, Supported Living Services, CHRP, CES or CHCBS funding currently being utilized by the individual.
- A transfer packet for the individual will be obtained to include the current Service Plan, Social, Medical, and Psychological information, DD eligibility, SIS

assessment and support level, and other evaluations or assessments as appropriate. The Placement Coordinator will review the information packet. If the person is **not** enrolled in a waiver, then an Intake/Waiting List Case Manager will be assigned.

- The Intake Case Manager will meet with the person/family to obtain information about continuing needs and services by creating an initial person centered IP
- An overview of services (SLS, CHRP, CES) and the Program Approved Service Agencies (PASA) in Larimer County will be shared with the individual/family.
- The Placement Coordinator will let the transferring CCB know the official transfer date.
- A program offer/CCB transfer will be entered in the Program Change Application for SLS, CES, CHRP, CHCBS transfers.
- If they are on the waiting list for the DD Waiver, then the Intake Case Manager will submit a DD waiver waiting list referral to the Placement Coordinator.
 - The Placement Coordinator will process the referral and send to the file room to be filed in the person's virtual file.
- If the person is already enrolled in a Waiver, the Placement Coordinator will notify the appropriate Director of Case Management to assign an ongoing Case Manager.

To transfer HCBS-DD Funding into Larimer County:

- Medicaid eligibility will be transferred from the previous county or will be reestablished in Larimer County.
- The Placement Coordinator will request BUS and Bridge access so the Case Manager can access the 100.2 and other information.
- The current support level will be requested from the current CCB as a guide for determining the amount of HCBS-DD services needed for the transferred person.
- The Provider Selection procedures for HCBS-DD services will be used to share information about the individual.
- The interested PASAs offer specific residential and/or day program services. The offers will be shared with the individual/family and a decision made to accept service offers for both residential and day program services.
- The Case Manager will facilitate an Interdisciplinary Team (IDT) meeting to include the new residential and day services staff, the individual and family, the Case Manager and/or other staff from the sending CCB. Transition plans will be made, and a target date set for admission into services.
- The Placement Coordinator will contact the sending CCB, relay start date information and finalize the transfer of the HCBS-DD funding.
- The Case Manager will complete and distribute the new Service Plan, Medicaid eligibility paperwork and County Notification forms.
- The Case Manager will enter the new admit date and the PASA details in the PCR.

To transfer Supported Living Services, CHRP or Children's Extensive Support Funding into Larimer County:

- The Case Manager will meet with the person/family to explain the Provider Selection procedure of identifying and prioritizing individual needs, selecting a PASA agency and completing Medicaid paperwork for admission if necessary.
- The person/family will select a provider.
- Medicaid eligibility will be transferred from the previous county or will be reestablished in Larimer County.
- The Placement Coordinator will request BUS and Bridge access so the Case Manager can access the 100.2 and other information.
- An Interdisciplinary Team (IDT) meeting will be held to develop a new Service Plan, identify SLS services and supports, develop a Schedule of Service, and set an admission date.
- The Resource Allocation Committee or Support Services Case Management Director will review the plan of service for State SLS transfers.
- The Case Manager will finalize the Service Plan on the BUS if Medicaid SLS.
- The Placement Coordinator will contact the sending CCB to confirm in writing the transfer of either a Waiver, funding or State funded SLS.
- The Case Manager will enter the new admit date and the PASA details in the PCR.

Finalizing the Transfer of Resources

- HCPF will make contract adjustments.
- The Placement Coordinator will include the transfer information on Program Change Reports, by adding a new offer into the system.
- The Placement Coordinator will add any DD Waiver transfers on the monthly DD Enrollment Report to HCPF.
- The file room manager will complete and send the paperwork to the Department of Human Services to finalize the transfer of resources.

2/04.....11/22, 5/23, 5/23