

FOOTHILLS GATEWAY, INC.

Transfers

PROCEDURE:

General Guidelines

Persons receiving LTSS waiver services or Community First Choice (CFC) services 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.

LTSS Waiver/CFC transfers: For persons moving from Larimer County to another location in Colorado:

- The individual/family receiving any LTSS waiver services or CFC will notify the Case Manager of their intent to relocate. The Case Manager will document the individual needs and desire for ongoing services in the new community.
- The Case Manager will upload all documents that need to be uploaded in the CCM as outlined by HCPF.
- The Case Manager will fill out the Case Management Agency Transfer Form, saved on the J drive - J:\Case Management\Forms, and send this form and an email to the Intake Case Management Associate Director.
- The Intake Case Management Associate Director will send the transfer packet to the receiving CMA. The email will include which waiver the person is enrolled in, what their certification span is, any contact information that is provided, and include the agencies with whom they are working.

The following documents need to be uploaded in the CCM for I/DD waiver transfers:

- CES Waiver – the current CES application and approval letter from Telligen.
- DD and SLS Waiver – the Supports Intensity Scale (SIS) level of funding or Interim Support Level Assessment (ISLA), as appropriate.
- CHRP – the ICAP.
- **ALL** I/DD waiver transfers must have the person's delay or DD Determination documentation and the testing used to determine eligibility uploaded in the CCM.
- Transfers 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 Case Management Agency to agree on a specific date for the funding transfer.
- The receiving CMA will notify the Intake Case Management Associate Director of agreed upon transfer date which will then be communicated to the Case Manager.
- The Case Manager will end date the case manager and Foothills Gateway care team card in the CCM.Team.

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 will upload all required documents in the CCM.
- The Case Manager will fill out the Case Management Agency Transfer Form, saved on the J drive - J:\Case Management\Forms. The Case Manager will this form by email to the Intake Team (intaketeam@foothillsgateway.org)
- The Intake Case Management Associate Director 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) or Interim Support Level Assessment (ISLA) is used to determine the level of funding. The support level is shared with the new CMA to assist in the development of services.
- HCBS-DD funding can include residential, day services, behavior, and transportation services.
- The CMA will notify the Intake Case Management Associate Director of the official transfer date and will communicate the information to the Case Manager.

The Case Manager will end date the case manager and Foothills Gateway care tema card in the CCM, **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 will ensure all necessary documents are uploaded into the CCM.
 - SIS or ISLA, as appropriate
 - CES Application and Telligen Approval Letter
 - DD Determination (outcome letter and assessments)
 - ICAP (CHRP)
- The Case Manager will fill out the Case Management Agency Transfer Form (location:J:\Case Management\Forms).
- The Case Manager will email the Case Management Agency Transfer Form to the Intake Case Management Associate Director.
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- An email is sent from the Intake Case Management Associate Director to the receiving CMA as notification of a pending transfer of SLS, CHRP or CES.
- The Intake Case Management Associate Director will notify the appropriate Coordinators/Directors at FGI of the plan to transfer.
- The receiving CMA will notify the Intake Case Aide of the transfer date and the Intake Case Aide will inform the Case Manager of the transfer date.
- The Case Manager will end date the case manager and Foothills Gateway care team cards in the CCM

LTSS Waiver/CFC transfers for persons moving into Larimer County from another location in Colorado:

- Intake Team will receive a transfer email from an individual/family or from another Case Management Agency (CMA) in Colorado.
- If initially contacted by the family, the Intake Case Aide will contact the case management agency currently providing services to obtain confirmation of the proposed move and agreement to transfer the member's case management services to Foothills Gateway.
- A transfer email for the individual will be obtained and the Intake Case Aide will review the information in the CCM. An activity log will be entered when CCM access has been granted. The activity log will include when we received the transfer information.
- 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 Plan.
 - An overview of services (SLS, CHRP, CES) and the Program Approved Service Agencies (PASA) in Larimer County will be shared with the individual/family.
- A program offer/CMA transfer will be entered in the Program Change Application for SLS, CES, CHRP, CwCHN transfers.
- The Intake Case Manager will submit a DD waiver waiting list referral, as appropriate, to the file room staff.
 - The file room staff will process the referral both on our internal spreadsheet and in the CCM and send to the file room email to be filed in the person's virtual file.
- If the person is already enrolled in a Waiver, the intake case aide will email the appropriate Director/Associate Directors/Coordinator and request a case manager assignment and transfer date.
- The Intake Case Aide will let the transferring CMA know via email of the official transfer date and will enter an activity log with this information.
- The Foothills Gateway Case Manager will add themselves as the Case Manager in the CCM, under Care Team.

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 Intake Case Aide will request CCM and Bridge access so the Case Manager can access the person's record, including the 100.2, Program Card, Service Plan and Care Plan.
- 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 the Member Identified Team (MIT) meeting to include the new residential and day services staff, the individual and family, the Case Manager and/or other staff from the transferring CMA. Transition plans will be made, and a target date set for admission into services.

- The Intake Case Management Associate Director will contact the transferring CMA, relay start date information, and finalize the transfer of the HCBS-DD funding. An activity log will be entered to include the transfer date that was agreed upon by the CMAs.
- The Case Manager will complete and distribute the new Service Plan, Medicaid eligibility paperwork and County Notification forms. The Case Manager will enter the PASA details in the Program Change Report (PCR).
- The Case Manager will add themselves as the Case Manager in the CCM, under Care Team.

Supported Living Services, CHRP, CwCHN or Children's Extensive Support transfers 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 Intake Case Aide will request CCM BUS and Bridge.
- The Case Manager will add themselves as the primary case manager in the CCM, Care Team.
- A Member Identified Team (MIT) 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 CCM.
- The Intake Case Management Associate Director will contact the sending CMA to confirm in writing the transfer of either a Waiver funding or State funded SLS. An activity log will be entered in the CCM with the transfer date information.
- The Case Manager will enter the PASA details in the PCR.

Finalizing the Transfer of Resources

- HCPF will make contract adjustments.
- The Intake Case Management Associate Director will include the transfer information on Program Change Reports, by adding a new offer into the system.
- The Intake Case Management Associate Director 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.

Non-I/DD transfers / Other waivers to Foothills Gateway from another CMA:

- All appropriate documents need to be uploaded to the CCM from the sending CMA and access to the CCM and Bridge will need to be given to Foothills Gateway – Med Compass.
- An email will be sent to the CMAtransfers@foothillsgateway.org informing the Intake Case Aide team that a member is transferring to FGI.
- The Intake Case Aide will review the CCM record and ensure that the appropriate documents are uploaded in the CCM.

- The Intake Case Aide will email the LTSS Associate Directors with the person's name, which waiver they are enrolled in and ask for a Case Manager and a transfer date.
- The Intake Case Aide will send info to File Room Manager to create a virtual file and a fact sheet record.
- The Case Aide will email a proposed transfer date to the transferring CMA, once a date has been agreed upon, the Intake Case Management Associate Director will communicate this with the assigned CM and cc'ing their supervisor and Associate Directors. An activity log will be entered with the transfer date information.

Non-I/DD Other waiver transfers to another CMA:

- Case Manager will notify the Intake Case Management Associate Director of the transfer by filling out the Case Management Agency Transfer Form, saved on the J drive - J:\Case Management\Forms.
 - Case Manager will update the CCM with the new address and contact info (if it is different).
 - Case Manager will be responsible for uploading appropriate documents in the CCM and granting access to the new CMA in the CCM and the bridge.
 - Intake Case Management Associate Director will double check the CCM to make sure documents are uploaded, check the cert dates to make sure they are current and will make sure the receiving CMA has access in the CCM and bridge. Then an email will be sent to the transferring CMA,
 - Intake Case Management Associate Director and the transferring CMA will negotiate a transfer date.
 - Intake Case Management Associate Director will notify the Case Manager, Supervisor and Associate Directors of the transfer date.
 - The Case Manager will need to close out the member's record in our internal systems, end date the case manager and Foothills Gateway care team cards in the CCM.
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- 2/04 ... 5/23, 5/24, 5/25; 5/26