



Transition Procedures

To ensure that all options counseling and transitions are person-centered, it is expected that options counseling will be initiated by and completed with the consumer and/or consumer’s guardian only. A request cannot be made by or with a current or requested provider.

1. New consumer starting services

- a. During the initial functional assessment, targeted case management options will be presented. A consumer or consumer’s guardian will choose a TCM by signing the Options Counseling/Choice Form.
- b. CDDO will notify the MCO and requested TCM of the selection made by sending them a copy of the form. A Change of Targeted Case Management Service Provider Form will also be sent to the requested TCM.
- c. Case management services will become effective once the Change of Targeted Case Management Service Provider Form is returned to the CDDO with all required signatures.
- d. CDDO will send a copy of the Change of Targeted Case Management Service Provider Form to TCM as notification of receipt and this information will be entered into KAMIS.

2. Change in Targeted Case Management, only

- a. Consumer or consumer’s guardian may request a change in case management by contacting the CDDO.
- b. Consumer and/or guardian will sign the Options Counseling/Choice Form.
- c. CDDO will notify current and requested TCM and MCO of the change by sending a copy of the Options Counseling/Choice Form to them.
- d. A Change of Targeted Case Management Service Provider Form will be sent to the requested TCM, establishing the effective date.
- e. **Requested TCM** will be responsible for obtaining all required signatures, including that of the current TCM.
- f. The Change of Targeted Case Management Service Provider Form should be returned to the CDDO **within 3 business days** of having obtained all signatures required.
- g. CDDO will sign off on the form and will send copies to both TCM’s as notification of receipt.
 - i. As a reminder, information exchanged will include TCM units used/left, PCSP, guardianship papers, etc.

3. Change in Service Providers, only

- a. Consumer or consumer's guardian may request a change in providers by contacting the CDDO.
- b. Consumer and/or guardian will sign the Options Counseling/Choice Form.
- c. CDDO will send a copy of the Options Counseling/Choice Form to the TCM, current and requested provider and the MCO.
- d. TCM will be responsible for scheduling and facilitating the transition meeting according to the requirements outlined by the CDDO ***Transition Plan Guidelines (attached)***.
 - i. All entities involved in this change should be represented at this meeting.
- e. The effective date should be when services stop at the current provider and start at the requested provider, which should be agreed upon by all involved parties. **This date should match on all documentation.**
- f. The transition plan, including signature page, should be returned to the CDDO **within 3 business days** of the transition meeting. A delay in returning the completed documentation could result in billing delays or denials.
- g. CDDO will sign off at the top of the transition plan and will send copies of the plan to TCM and both providers involved as notification of receipt.

4. Change in Case Management and Service Providers

- a. Consumer or consumer's guardian may request this change by contacting the CDDO directly.
- b. Consumer and/or guardian will sign the Options Counseling/Choice Form.
- c. CDDO will notify current and requested TCM, current and requested provider and the MCO of the change by sending them a copy of the Options Counseling/Choice Form.
- d. A Change of Targeted Case Management Service Provider Form will be sent to the requested TCM, establishing the effective date of change for targeted case management services.
- e. **Requested TCM** will be responsible for obtaining all required signatures on the Change of Targeted Case Management Service Provider Form, facilitating the transition meeting and obtaining all required signatures from those present.
- f. The transition plan, including the Change of Targeted Case Management Service Provider Form and signature page, should be returned to the CDDO **within 3 business days** of the transition meeting. A delay in returning the completed documentation could result in billing delays or denials.
- g. CDDO will sign off on the transition plan and Change of Targeted Case Management Service Provider Form and will send copies of each to all parties involved as notification of receipt.