



DEVELOPMENTAL DISABILITIES ADMINISTRATION (DDA)
COMMUNITY RESIDENTIAL SERVICES

Residential Referral Transition

CLIENT'S NAME
ADSA ID NUMBER
RECEIVING AGENCY

Prior to starting transition process, the following steps should be completed:

TASK	COMPLETED		COMMENTS
	YES	NO	
Provider met with client / guardian	<input type="checkbox"/>	<input type="checkbox"/>	
Housemates met and agreed to live together	<input type="checkbox"/>	<input type="checkbox"/>	
Location of the home has been established (delays in locating housing should not delay the rest of transition process)	<input type="checkbox"/>	<input type="checkbox"/>	
Necessary environmental modifications identified	<input type="checkbox"/>	<input type="checkbox"/>	
CRMs for client and housemates have discussed compatibility of clients	<input type="checkbox"/>	<input type="checkbox"/>	
RM verified the provider agreed to provide support to the client	<input type="checkbox"/>	<input type="checkbox"/>	
CRM verified client / guardian have agreed to receive services from provider	<input type="checkbox"/>	<input type="checkbox"/>	
LTC notified of tentative move date and eligibility confirmation has been requested	<input type="checkbox"/>	<input type="checkbox"/>	
History of psychiatric hospitalization / detainment information has been provided if applicable	<input type="checkbox"/>	<input type="checkbox"/>	

Transition Team Members (determined by need)

Receiving CM sets up email communication group (internal and external) of team, which all use to keep informed of transition progress. Add name and contact information below. *Suggestions: Hospital Social Worker; SOTP, Attorney, Speech Language Pathologist.*

Client:	
Guardian:	
SL Provider:	
RM (sending)	
RM (receiving)	
CM (sending)	
CM (receiving)	
Supervisor (sending)	
Supervisor (receiving)	
Clinical Team CM	
SOCR (SOLA, SAIF) PM	
RCL CM	
Other	
Other	

Projected Move Date (adjust as needed):

Before - Move Tasks			
BEFORE - MOVE TASKS	PERSON RESPONSIBLE FOR TASK AND STATUS UPDATE	PROJECTED DATE OR N/A	COMPLETE DATE OR N/A
Meeting Facilitator: Sending CM	For each task, identify the responsible party who is responsible to identify barriers, timelines for completion, and make the sure tasks are completed. Tasks actions must address person / guardian wishes.		
Current Status Sending entity gathers the information to share:	Gather / Share updated information from referral to current • Lead: • Comment:		
	Gather / Share information and data on incidents such as IRs, aggression, SIB, elopement, etc. • Lead: • Comment:		
	Gather / Share current FA / PBSP, CSCP • Lead: • Comment:		
	Gather / Share new updates between each meeting with data if possible. Any new challenging behaviors or medical changes? • Lead: • Comment:		
Home Status New agency works with CM/RM	Home identified, lease in place • Lead: • Comment:		
	Person visited home or shown pictures • Lead: • Comment:		
	Identified environmental issues and status on modifications • Lead: • Comment:		
	For CPP follow Policy 15.04 for site approval (Mixed Household Request) • Lead: • Comment:		
Transition Hours New agency works with RM	Transition hours requested and approved • Lead: • Comment:		
Community Supports Confirmed – Historical Information Transferred (DSHS form, 10-635)	PCP confirmed, appointments scheduled as necessary • Lead: • Comment:		
	Dentist confirmed, appointments scheduled as necessary • Lead: • Comment:		
	Psychiatric prescriber confirmed, know date of last review (follow up needed) • Lead: • Comment:		
	Other specialists needed, OT, PT, SOTP, etc. • Lead: • Comment:		
	Behavioral health enrollment • Lead: • Comment:		

	New pharmacy setup • Lead: • Comment:		
	Current MARs, shared with new provider. Final MAR provided on day of transfer. • Lead: • Comment:		
	Prescription or medication supply going with person (number of days) • Lead: • Comment:		
	Gather / Share information on any previously scheduled appointments • Lead: • Comment:		
	Gather / Share information on how meds are given (oral, injections, topical) • Lead: • Comment:		
	Nurse Delegation in place • Lead: • Comment:		
	Gather / Share historical medical information and assessments • Lead: • Comment:		
	Other • Lead: • Comment:		
Nutrition / Dietary New agency and CM	Special diet, alternate nutrition delivery • Lead: • Comment:		
	Restrictions and ETPs are in place • Lead: • Comment:		
Vocational New agency and CM	Vocational services confirmed • Lead: • Comment:		
School Identified New agency and CM	Confirm School enrollment and transportation plan • Lead: • Comment:		
Special Equipment New agency and CM, work with waiver coordinator or RM depending on funding source	Identify assessed needs and equipment • Lead: • Comment:		
	Request submitted		
	Confirm On Site		
CARE Assessment New agency and CM	PCSP updated and includes SL service, signed copies to providers • Lead: • Comment:		
	Verify location code is accurate in PCSP		
	Agency has signed copy of PCSP		

	Pan current		
	End old RAC and authorization and create RAC for new services		
Rate Assessment New agency and RM	Rate Assessment completed / Rate approved • Lead: • Comment:		
	Exhibit sent to new provider for signature		
Start-Up Funding New agency and RM Note: If Start-Up is needed, the list must be approved before purchases are made	Individual assessed for needed start-up funds, request submitted by agency • Lead: • Comment:		
	Confirmed approval with up to amount • Lead: • Comment:		
Financial New agency and CM Note: Ensure guardian is involved and understands their funds must be paid after the individual's needs are met.	Verify SSI and other unearned income in place • Lead: • Comment:		
	Establish payee, determine transition process • Lead: • Comment:		
	Gather / Share financial data, IFP, bank account balances, trust funds, verify they reconcile by current provider and confirmed by new • Lead: • Comment:		
	Gather / Share personal records such as birth certificate, ID, guardianship documentation, SS card • Lead: • Comment:		
	Gather / Share personal property records and verification of actual property; confirmation by new provider • Lead: • Comment:		
Support Plans New agency and CM	Consultation meeting between new and current support teams, what works, what does not • Lead: • Comment:		
	New provider has draft FA / PBSP plan in place • Lead: • Comment:		
	New agency has plan in place on how to support person with IISP type functions while draft is being developed • Lead: • Comment:		
	Cross System Crisis plan if needed • Lead: • Comment:		
	Staff are trained on how to meet person's support needs utilizing their plans		

	<ul style="list-style-type: none"> • Lead: • Comment: 		
	ETPs / restrictive procedures approved		
	<ul style="list-style-type: none"> • Lead: • Comment: 		
Transition day plan	Transportation between current and new supports		
New agency and CM	<ul style="list-style-type: none"> • Lead: • Comment: 		
	Determine property transition agreement		
	<ul style="list-style-type: none"> • Lead: • Comment: 		
	Medication and MAR transition plan		
	<ul style="list-style-type: none"> • Lead: • Comment: 		
	Plan to ensure person has funds for meals if long transport		
	<ul style="list-style-type: none"> • Lead: • Comment: 		
After Client Moved - Tasks	Performs task		
DDA Tasks	<input type="checkbox"/> RM confirms transition occurred with the with new agency		
CM and RM	<input type="checkbox"/> CM confirms how transition went with the individual and guardian		
	<input type="checkbox"/> CM Barcode verification of move		
	<input type="checkbox"/> CM update client residence and phone number (CARE) – Residence, Client Contact, Collateral Contacts		
	<input type="checkbox"/> CM verify Rep Payee information in Collateral Contacts (CARE)		
	<input type="checkbox"/> CM notify supervisor for case transfer.		
Financial	<input type="checkbox"/> CM confirms payee in place		
CM / RM	<input type="checkbox"/> CM verifies person is receiving SSI or other funding		
	<input type="checkbox"/> CM submits ETR state only for RAR completed		
	<input type="checkbox"/> RM requests receipts submitted for start up		
	<input type="checkbox"/> RM submits SL authorizations		
	<input type="checkbox"/> CM confirms bills are in correct client's name, both at new home or previous home.		
	<input type="checkbox"/> RM verifies that if RARs will be required, applications for food and housing subsidies have been submitted.		
Support Plans	<input type="checkbox"/> CM confirms PSCP is accurate with agency		
CM	<input type="checkbox"/> CM ensures agency has a Draft IISP completed within 30 days, signed and disseminated		
	<input type="checkbox"/> CM ensures agency has a Finalized FA/PBSP signed and disseminated		
	<input type="checkbox"/> CM ensure agency has an IFP completed, signed and disseminated		
	<input type="checkbox"/> CM ensures agency has all additional plans such as Nurse Delegation, medical equipment instructions		
	<input type="checkbox"/> Confirm staff are trained to all new support plans		