

SDSI Transition Plan Guidelines

The typed transition plan should be covered in a transition meeting with representatives from the current and requested provider. The requested TCM is required to facilitate the transition and should make every attempt to ensure that an agreed upon time and place is scheduled within a reasonable timeframe. The transition plan must identify the effective date of the transition and should include a signature page of all persons present. The transition plan should be submitted to the CDDO **within three business days** of the transition meeting to allow for the review the transition plan. **If all items are not adequately addressed in the transition plan it will be sent back to the TCM for completion before the CDDO will process it and changes are made in KAMIS.**

Signatures of all members in attendance:

1. Consumer and/or Consumer's Guardian
2. Current Case Manager
3. Requested Case Manager
4. Current Service Provider
5. Requested Service Provider
6. MCO/Care Coordinator (if applicable)

Current Staffing:

An explanation of the current staffing schedule.

Medical Supports:

An explanation of the current medical supports and current health issues.

Financial Supports:

An explanation of the current financial supports and issues if any.

Reason for the Transition:

An explanation of why the consumer and/or guardian have chosen to change services. There should also be information as to how the support team has ensured that the transition was person-centered and least restrictive.

Transition Effective Date:

The date in which all parties agree that services will cease with the current provider and will begin with the requested provider.

Documents to be available for transfer at the transition meeting: (at a minimum)

1. Current copy of the PCSP including any outcome data generated for that particular plan.
2. Current copy of the ISP.
3. Current copy of Behavior Support Plan and/or rights restrictions and any data supporting frequency and severity of occurrence for the program year.
4. Any other behavior data accumulated for the purpose of functional assessments for the program year.
5. Guardianship and other pertinent documents (if applicable).