
TO: DDW Case Managers, Mi Via Consultants and Medically Fragile Case Managers

FROM: Jennifer Rodriguez, DDW Program Manager Christine Wester, Mi Via Program Manager, and Iris Clevenger, Medically Fragile Program Manager

DATE: August 15, 2014

RE: Transitions between Waiver Programs: Traditional DD Waiver, Mi Via and Medically Fragile Waiver

Transition planning is critical to successful transfers between various waiver programs. Regardless of which waiver program an individual is transitioning *to or from*, it is DDS's expectation that transition planning and meetings occur smoothly and in a timely manner.

To initiate the process for transitioning between waiver programs, the participant and/or their legal representative needs to request a Waiver Change Form from the Department of Health/Developmental Disabilities Supports Division (DOH/DDS). Once this form has been completed and returned to the Regional Office (RO) or the Medically Fragile (MF) Manager, the RO/MF Waiver Manager will send it to the DDW case manager, Mi Via consultant, Medically Fragile case manager, Third Party Assessor, and the Income Support Division (ISD). For individuals transitioning to the Traditional DDW, the Case Management Freedom of Choice (sometimes referred to as the Primary Freedom of Choice, which is a separate document used for new allocations,) is also needed.

The next step in the process is to hold a transition meeting. Transition meeting minutes are required for all transfers as well as utilizing the Letter of Transfer and Receipt as a tool to identify key dates, paperwork and responsibilities in the transition process. The participant or their legal representative must be present at the transition meeting. Important information is exchanged to ensure the individual's health and safety. Transitions must occur within 90 days.

All transitions may only start on the first of the month. Individuals will keep the same Individual Service Plan (ISP) and Service and Support Plan (SSP) date span when transitioning between waiver programs. This means upon transition to the new waiver program, budgets will be pro-rated for the remainder of the ISP/SSP date span. Once the transition meeting occurs and the pro-rated budget is ready to be submitted, the DDW case manager, Mi Via consultant, or Medically Fragile case manager can determine what month the new plan and services will start in: the first day of the next month if the budget is submitted between the 1st and 14th of the current month, or the first day of the following month if the budget is submitted on or after the 15th of the month and before the 1st of the next month. Coordination between the sending waiver and the receiving waiver is critical to ensure there is a smooth budget transition. This is to avoid and gap in services.

Waiver transitions will not be allowed if the individual is 90 calendar days or less from the Level of Care (LOC) expiration date, unless the LOC has already been submitted and approved.

If a participant wants to switch waivers within the first 30 days of a new waiver allocation, and medical or financial eligibility has not begun, then a waiver transfer is permitted. If the eligibility process has already begun, the individual must meet medical and financial eligibility before the transfer can occur.

DDSD is available at any point during the transfer process to provide technical assistance to teams and individuals/guardians. For questions, resources or support, contact your DDSD Regional Office staff.

If individuals or families wish to obtain more information about any of the DOH/DDSD waiver programs, please contact the DDSD Personnel below:

DDSD Mi Via Liaisons

- Metro Region-Marie Velasco (505) 841-5503
- NE Region-Anysia Fernandez (575) 758-5934
- NW Region-Dennis O'Keefe (505) 863-4978 and Katherine Herrera (505) 326-5864
- SE Region-Eugene Vigil (575) 624-6100
- SW Region-Dave Brunson (575) 528-5180

DDSD Case Management Coordinators

- Metro Region- Ellen Hardman (505) 841-5561 and Steve Moyers (505) 841-5553
- NE Region-Linda Dwyer (575) 758-5934
- NW Region- Cathy Saxton (505) 326-3890
- SE Region-Debra Medina (575) 624-6100
- SW Region-Cheryl Dunfee (575) 528-5189

DDSD Medically Fragile Waiver Contact:
Iris Clevenger (505) 841-2913

Thank you in advance for your cooperation to coordinate and collaborate with each other to ensure waiver transitions are a smooth and seamless process.