

AGED AND DISABLED WAIVER

PERSONAL OPTIONS CASE MANAGEMENT TRANSFER FACT SHEET

Purpose: To provide direction regarding the process for Personal Options participants who choose Case Management Services.

1. Participant initially requests a Case Management (CM) agency from the Resource Consultant. The participant may choose Case Management services at the time of the Service Plan/budget planning or other times there is a need for the service.
2. The Resource Consultant provides a Case Management Selection Form, for the appropriate county, to the participant.
<http://www.wvseniorservices.gov/DocumentCenter/ProgramSpecificDocuments/CaseManagementSelectionForms/tabid/155/Default.aspx>
3. The participant completes and provides the Case Management Selection Form to the Resource Consultant.
4. The Resource Consultant uploads the Selection Form in ADW CareConnection© and also notifies the BoSS Transfer Coordinator that a person has chosen to receive Case Management while in the Personal Options service delivery model.
5. The Transfer Coordinator will contact the Case Management agency to see if the CM agency can accept a new referral. If the CM agency accepts the new referral, the assignment will be effective on the first day of the month following the request for Case Management.
6. The BoSS Transfer Coordinator will complete and upload an Agency Assignment Notice designating the Case Management Agency and send a notice to the following:
 - a. Public Partnerships Staff, Senior level staff, Resource Consultants.
 - b. Personal Options Program Manager at the Bureau of Senior Services.
 - c. Case Management Agency
 - d. Copy is mailed to the participant
 - e. Please note: The Case Manager does not have access to ADW CareConnection© (the Resource Consultant does have access).
7. The Case Manager will contact the Resource Consultant and the participant to arrange for a Person Centered Assessment and a new Service Plan (which will include the new service, Case Management). The completed assessment and plan will then be forwarded by the Case Manager to the Resource Consultant for uploading into ADW CareConnection©.
8. The Resource Consultant will provide a copy of the PAS, Personal Options Assessment and current Service Plan to the Case Manager.
9. The Resource Consultant will submit the re-evaluation MNER in ADW CareConnection© annually.