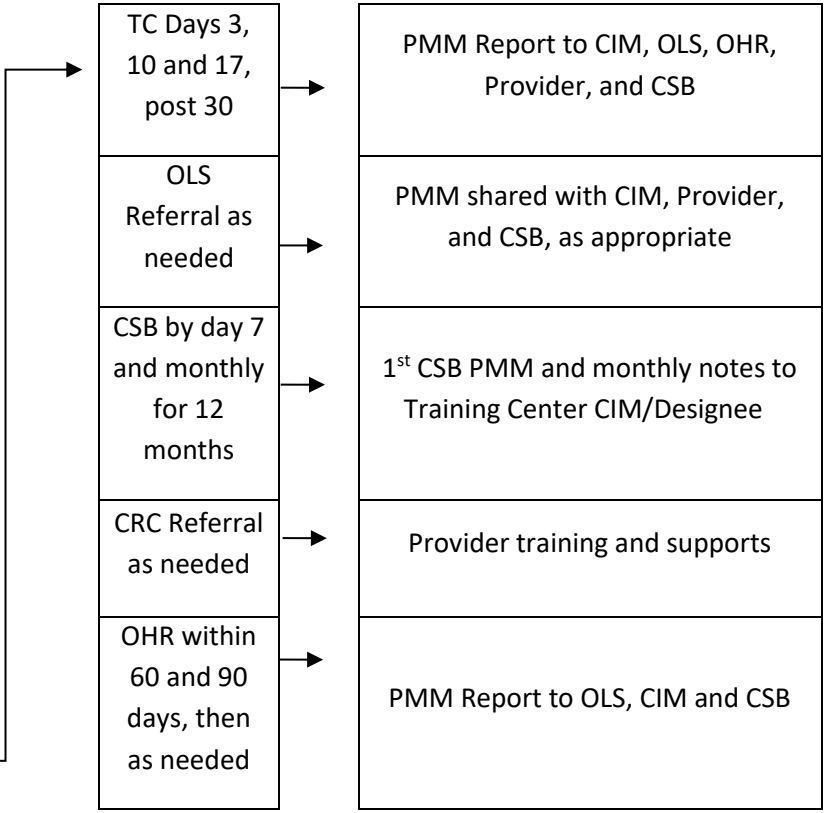


**Active Move Status**

**Virginia's Training  
Center to Community  
Move Process**

Week 1	Initial Pre-Move Meeting
Week 2	Individual/SDM/CSB reviews providers
Weeks 3,4 and 5	Provider Tours
Weeks 3,4 and 5	Provider Information Requests
Week 6	Provider Pre-Move Meeting
Week 7	Day Visits
Week 8	Evening Visit
Week 9	Provider Training and Overnight Visits
Week 10	Final Pre-Move Meeting
Week 11	Preparation for Moving
Week 12	Moving
	Post-Move Monitoring

**PMM Reporting**



	Individual/SDM	Training Center	CSB	Provider	CIM/DCM	OL	CRC	OHR
Week 1	Initial Pre-Move Meeting*	Initial Pre-Move Meeting*	Initial Pre-Move Meeting*		Monitors active move list Reviews			
	<b><u>Discharge Plan/ Discussion Record</u></b> (developed or revised) Participates in the meeting	<b><u>Discharge Plan/ Discussion Record</u></b> (developed or revised) <b>Assess DME needs</b> Completed within 48 hours and sent to the CSB, Provider (if identified) and SDM within 72 hours.	<b><u>Discharge Plan/ Discussion Record</u></b> (developed or revised)  CSB SC participates in initial meeting, provides 3 potential provider options, confirms consent for Individual Needs Profile (LISCP) and individual entered into survey; works with TC to coordinate referrals for DARS, REACH as applicable.		<b><u>Discharge Plan/ Discussion Record</u></b> (primary reviewer for all to ensure accuracy)  Ensures posting for CO access			
Week 2	Choose providers to tour	Coordinates TC and Individual	Participates in tours as needed/available					

\* denotes primary task detailed in additional chart. Documents are **bold underlined**.

\*\* In the event of barriers to D/C, a special circumstance meeting will occur and an RST referral may be initiated.

	Individual/SDM	Training Center	CSB	Provider	CIM/DCM	OL	CRC	OHR
		attendance at provider tours  Schedule tours with Individual/AR/TC/Providers						
Week 3	Provider Tours	Provider Tours	Provider Tours	Host Tours				
Week 4	Provider Tours	Provider Tours	Provider Tours	Host Tours				
Week 5	<b>Provider Tours</b>	<b>Provider Tours</b>	<b>Provider Tours</b>	<b>Host Tours</b>	<b>If barriers to discharge are identified, steps to overcome the barriers will be identified and implemented.</b>			
	Choose Provider	Communicate with CSB regarding chosen provider	Communicate with TC regarding chosen provider	Confirm Attendance at Pre-Move Meeting with CSB and TC				
Week 6	Provider Pre-Move Meeting*/**	Provider Pre-Move Meeting*/** Confirm procurement method for DME	Provider Pre-Move Meeting*/** [Confirm provider choice – 5 beds, etc.] CSB SC to schedule intake/PCP with provider, SDM, and individual to occur by final pre-move meeting.	Onsite observation/Shadowing  Provider Pre-Move Meeting*/**	Pre-Move Meeting*/** [review 5+beds/NF/ICF and make RST referral if needed] After Provider Chosen Submits <b><u>Request for Provider Information</u></b>	Receives and responds to <b><u>Request for Provider Information if there are potential concerns</u></b> OL Provider Site Visit if OL determines necessary	Receives and responds to <b><u>Request for Provider Information w/in 3-5 days</u></b>	Attends all Provider Pre-Move Meetings* Receives and responds to <b><u>Request for Provider Information w/in 3-5 days</u></b> Possible OHR Provider Site Visit

\* denotes primary task detailed in additional chart. Documents are **bold underlined**.

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	Individual/SDM	Training Center	CSB	Provider	CIM/DCM	OL	CRC	OHR
Week 7	Day Visits	Day Visits		Day Visits				
Week 8	Evening Visit	Evening Visit		Evening Visit				
Week 9	Overnight/ Weekend Visit	Arranges for Provider Training prior to overnight visit		Receive Training Overnight/ Weekend Visit  Submit <b><u>Plan for Supports and Customized Rate App</u></b> to CSB				
Week 10	Final Pre-Move Meeting*/**	Final Pre- Move Meeting*	Final Pre-Move Meeting*  Review Provider <b><u>Plan for Supports, Waiver ISARs</u></b> submitted via WaMS	Final Pre- Move Meeting* [confirm PFS meets essential supports]				Participates, as needed
Week 11	Preparation for Moving	Preparation for Moving  Additional Provider Site	Additional Provider Site Review if needed*	Preparation for Moving				

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	Individual/SDM	Training Center	CSB	Provider	CIM/DCM	OL	CRC	OHR
		Review if needed*						
Week 12	Moving	Moving	CSB gives TC final copy of CSB and provider <b><u>PCP/ISPs</u></b>	Moving				
Month 1		PMM Visit on Day 3*	PMM Visit by Day 7*					
		PMM Visit on Day 10*						
		PMM Visit on Day 17*						
Month 2			Monthly PMM Visits*			PMM Visit by referral	PMM Visit by referral	PMM Visit
Month 3			Monthly PMM Visits*			PMM Visit by referral	PMM Visit by referral	PMM Visit

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Primary Tasks and Core Responsibilities

Task	Purpose	Roles	Core Responsibilities
Initial Pre-Move Meeting	<ul style="list-style-type: none"> <li>The meeting held that signifies the beginning of the “active move” process.</li> </ul>	<ul style="list-style-type: none"> <li>Individual/SDM</li> </ul>	<ul style="list-style-type: none"> <li>Attends and helps facilitate meeting</li> </ul>
		<ul style="list-style-type: none"> <li>PST</li> </ul>	<ul style="list-style-type: none"> <li>Develops or updates the <b><u>Discharge Plan/Discussion Record</u></b>;</li> <li>Discusses individual specific training that will need to be provided;</li> <li>Discusses discharge specific tasks and identification of the responsible parties.</li> </ul>
		<ul style="list-style-type: none"> <li>CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>Begins gathering documents needed for CSB intake process (Receives packet of Information from TC).</li> <li>Obtain <b><u>PCP/ISP and Supports Intensity Scale long report</u></b> from Training Center.</li> <li>Before or at the meeting, provides at least 3 provider options to individual/SDM for review when desired.</li> <li>Before or at the meeting, obtains written agreement for <b><u>disclosure of information</u></b> and schedules tours at individual and family request.</li> </ul>
		<ul style="list-style-type: none"> <li>DCM/CIM</li> </ul>	<ul style="list-style-type: none"> <li>Attends Meetings as possible to provide oversight and guidance</li> <li>Complete QA of meeting process and reviews DPDR</li> </ul>
Tours	<ul style="list-style-type: none"> <li>To provide individual/SDM opportunity to visit providers, meet individuals</li> </ul>	<ul style="list-style-type: none"> <li>Individual/SDM</li> </ul>	<ul style="list-style-type: none"> <li>May choose to tour on own or with the CSB SC or TC staff.</li> <li>Decides on tour sites by contacting CSB and/or TC or in the initial pre-move meeting (following preliminary in-person screening).</li> </ul>

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Primary Tasks and Core Responsibilities

Task	Purpose	Roles	Core Responsibilities
	currently being served, meet staff, and for both parties to ask questions related to what is important to/for the individual.	<ul style="list-style-type: none"> <li>CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>Attends tours with individual/SDM as needed/available</li> </ul>
		<ul style="list-style-type: none"> <li>Training Center</li> </ul>	<ul style="list-style-type: none"> <li>Attends tours with individual/SDM</li> <li>Provides transportation and support to the individual during the tour</li> <li>Ensures essential supports are being met during tours</li> </ul>
Provider Information Request	<ul style="list-style-type: none"> <li>Once provider has been selected to visit, used to gain additional information regarding provider's readiness for providing support to individuals</li> </ul>	<ul style="list-style-type: none"> <li>DCM/CIM or designee</li> </ul>	<ul style="list-style-type: none"> <li>Send out <b><u>Provider Information Request</u></b> to the contact person at OLS and OHR.</li> <li>If warranted, CIM shares results with TC and with CSB. CSB will share information with individual/SDM.</li> <li>If Individual/SDM chooses a less integrated setting as defined by SA, CIM will ensure information; referrals and choices have been provided.</li> </ul>
		<ul style="list-style-type: none"> <li>OL</li> </ul>	<ul style="list-style-type: none"> <li>If OL deems necessary, reviews homes and comments will be completed within 3-5 days of request.</li> </ul>
		<ul style="list-style-type: none"> <li>OHR</li> </ul>	<ul style="list-style-type: none"> <li>Review of homes and comments will be completed within 3-5 days of request.</li> </ul>

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Primary Tasks and Core Responsibilities

Task	Purpose	Roles	Core Responsibilities
Provider Pre-Move Meeting	<ul style="list-style-type: none"> <li>To plan for the move to a chosen provider.</li> </ul>	<ul style="list-style-type: none"> <li>Individual/SDM</li> </ul>	<ul style="list-style-type: none"> <li>Attends and helps facilitate meeting</li> </ul>
		<ul style="list-style-type: none"> <li>PST</li> </ul>	<ul style="list-style-type: none"> <li>Reviews <b><u>Discharge Plan and Discussion Record</u></b> and updates as appropriate</li> <li>Identifies specific tasks and responsible parties</li> <li>Discusses and schedules training provider will need</li> <li>Determines and arranges environmental modifications</li> <li>Arranges shadowing for the provider</li> <li>Schedules a series of trial visits to evaluate the individual's response to the new environment and how well his or her needs are met</li> <li>Distributes current <b><u>discharge packet</u></b> including assessments, plans and physician's orders, to CSB SC and to provider.</li> </ul>
		<ul style="list-style-type: none"> <li>CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>Schedules intake/PCP meeting with provider, individual/SDM to occur by the final pre-move meeting. (Completes the <b><u>essential information</u></b> [EI], edits the <b><u>Personal Profile</u></b>; develops the <b><u>Shared Plan</u></b> and signs <b><u>Agreements</u></b>. Share <b><u>EI</u></b>, <b><u>Personal Profile</u></b>, <b><u>Shared Plan</u></b> and <b><u>Agreements</u></b> with chosen providers for their use in <b><u>Plan for Supports</u></b> development, which might be a <b><u>60-Day Assessment PFS</u></b>).</li> <li>Helps to identify providers and ensures scheduling with individual/SDM: Community Psychiatric, Medical, Behavioral Providers and Pharmacy</li> </ul>

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Primary Tasks and Core Responsibilities

Task	Purpose	Roles	Core Responsibilities
		<ul style="list-style-type: none"> <li>• DCM/CIM</li> </ul>	<ul style="list-style-type: none"> <li>• Reviews based on criteria established in SA</li> <li>• Monitors timelines</li> <li>• Provides technical assistance as needed</li> </ul>
		<ul style="list-style-type: none"> <li>• Provider</li> </ul>	<ul style="list-style-type: none"> <li>• As appropriate, provides alternative ideas for meeting individual's needs.</li> <li>• Determines within own agency and shares who will be the best people to attend trainings</li> <li>• Shares training plan to ensure training received at TC is shared with all staff supporting the individual</li> </ul>
		<ul style="list-style-type: none"> <li>• OHR</li> </ul>	<ul style="list-style-type: none"> <li>• Serves as a resource for meetings to provide information related to informed consent, and responsibilities of Substitute Decision Makers (SDM)</li> </ul>
		<ul style="list-style-type: none"> <li>• Training Center Discharge Coordinator or designee</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures trainings are scheduled</li> <li>• Ensures <b>discharge packet</b> is given to CSB and provider</li> <li>• Coordinates visits with provider</li> <li>• Coordinates all necessary equipment, medication, etc. is available for visits, as needed</li> <li>• Notifies all internal departments about visit schedule</li> <li>• Ensures all training has been completed prior to unsupervised visits</li> </ul>
Visits to Provider location	<ul style="list-style-type: none"> <li>• Day, evening and weekend/ overnight visits to chosen provider location to confirm good fit</li> </ul>	<ul style="list-style-type: none"> <li>• Individual/SDM</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in activities at the home. Is given a chance to get to know supports and support partners.</li> </ul>
		<ul style="list-style-type: none"> <li>• CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>• Receives information from TC and provider regarding outcome of visits.</li> </ul>
		<ul style="list-style-type: none"> <li>• Provider</li> </ul>	<ul style="list-style-type: none"> <li>• Provides feedback to TC to complete <b>Community Home Visit form</b></li> </ul>
		<ul style="list-style-type: none"> <li>• Training Center</li> </ul>	<ul style="list-style-type: none"> <li>• Completes <b>Community Home Visit form</b></li> </ul>

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Primary Tasks and Core Responsibilities

Task	Purpose	Roles	Core Responsibilities
	and ability to support.		
Final Pre-Move Meeting	<ul style="list-style-type: none"> <li>Final PST meeting to review visits and plan/confirm final preparations prior to move to new home.</li> </ul>	<ul style="list-style-type: none"> <li>Individual/SDM</li> <li>PST</li> </ul>	<ul style="list-style-type: none"> <li>Shares information regarding visits.</li> <li>Reviews <b><u>Discharge Plan and Discussion Record</u></b> and updates as appropriate</li> <li>Reviews the <b><u>Community Home Visit forms</u></b>,</li> <li>Decides if the potential provider appears to meet the individual's needs,</li> <li>Addresses any problems that were identified on the visits,</li> <li>Finalizes projected move date, and</li> <li>Begins making any final arrangements to ensure that they are completed prior to the move.</li> </ul>
		<ul style="list-style-type: none"> <li>Provider</li> </ul>	<ul style="list-style-type: none"> <li>Shares <b><u>Waiver Plan for Supports</u></b> with CSB that includes all essential supports (might be a <b><u>60-day Assessment Plan for Supports</u></b>).</li> </ul>
		<ul style="list-style-type: none"> <li>CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>Before or at the meeting, obtains and reviews <b><u>Waiver Plan for Supports</u></b> from provider to confirm discharge plan is incorporated in PFS.</li> <li>Before or at the meeting, CSB submits <b><u>Individual Service Authorization Requests</u></b> in WaMS.</li> <li>If needed, schedules site review with TC Discharge Coordinator/Designee.</li> </ul>
		<ul style="list-style-type: none"> <li>Training Center Discharge Coordinator or designee</li> </ul>	<ul style="list-style-type: none"> <li>If needed, schedules site review with CSB.</li> <li>Confirms needed medical equipment is in place</li> </ul>

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**Primary Tasks and Core Responsibilities**

Task	Purpose	Roles	Core Responsibilities
			<ul style="list-style-type: none"> <li>• Arranges for transportation and ensures medications, prescriptions and discharge documentation is prepared for the move</li> </ul>
		<ul style="list-style-type: none"> <li>• DCM/CIM</li> </ul>	<ul style="list-style-type: none"> <li>• Completes final review and ensures all steps of the moving process have been followed.</li> </ul>
Provider Site Review if needed		<ul style="list-style-type: none"> <li>• CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>• Confirms needed medical equipment in place and all environmental modifications have been completed</li> </ul>
		<ul style="list-style-type: none"> <li>• Training Center Discharge Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>• Confirm needed medical equipment in place and all environmental modifications have been completed</li> </ul>
Day of Move		<ul style="list-style-type: none"> <li>• Training Center</li> </ul>	<ul style="list-style-type: none"> <li>• Supplies and reviews medications/prescriptions</li> <li>• Provides any additional information to provider</li> <li>• Completes internal TC discharge process</li> </ul>
		CSB SC	<ul style="list-style-type: none"> <li>• Follows up with individual and provider</li> </ul>
		Individual	<ul style="list-style-type: none"> <li>• Moves to his/her new home</li> </ul>
		Provider	<ul style="list-style-type: none"> <li>• Ensures home is ready for individual to move in</li> <li>• Begins 60 day assessment period</li> </ul>
Post-Move Monitoring (PMM)	For training center staff to work collaboratively with the CSB, provider, and CIM to: <ul style="list-style-type: none"> <li>• Ensure essential and non-essential supports agreed upon in the Discharge Plan/Discussion</li> </ul>	<ul style="list-style-type: none"> <li>• Training Center</li> </ul>	<ul style="list-style-type: none"> <li>• 3, 10 and 17 and post 30 day visits</li> <li>• Contact SDM to assess satisfaction</li> <li>• Complete at least two visits in the home and at least one at day services</li> <li>• Complete <b><u>PMM Report</u></b></li> <li>• Share <b><u>PMM Report</u></b> with PMMC or designee, provider and CSB SC</li> </ul>
		<ul style="list-style-type: none"> <li>• OL</li> </ul>	<ul style="list-style-type: none"> <li>• PMM Visit by referral Complete <b><u>Report in OLIS</u></b></li> <li>• Share <b><u>PMM Report</u></b> with CIM and posts in OLIS</li> </ul>
		<ul style="list-style-type: none"> <li>• OHR</li> </ul>	<ul style="list-style-type: none"> <li>• Visits within 60 and 90 days of move, and then as needed</li> </ul>

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Primary Tasks and Core Responsibilities

Task	Purpose	Roles	Core Responsibilities
	Record are being provided.		<ul style="list-style-type: none"> <li>• Complete <b><u>PMM Report</u></b></li> <li>• Share <b><u>PMM Report</u></b> with CIM</li> </ul>
	<ul style="list-style-type: none"> <li>• Monitor the individual's adjustment to his/her new home and supportive employment or day program.</li> </ul>	<ul style="list-style-type: none"> <li>• CSB SC</li> </ul>	<ul style="list-style-type: none"> <li>• Visits by day 7 and monthly for 12 months, Then follows case management guidelines</li> <li>• Share visit and case management notes (or optional <b><u>PMM report</u></b> or <b><u>On-site Visit Tool</u></b>) with CIM for first year.</li> <li>• Optional <b><u>PMM Report</u></b> available from CIM</li> <li>• Optional <b><u>On-site Visit Tool</u></b> available online at: <a href="http://www.dbhds.virginia.gov/library/document-library/ods-pcp-20091001-opt-on-sitevisittool.doc">http://www.dbhds.virginia.gov/library/document-library/ods-pcp-20091001-opt-on-sitevisittool.doc</a></li> </ul>
	<ul style="list-style-type: none"> <li>• Offer additional support services to the individual, SDM (where applicable), provider, and/or CSB.</li> <li>• Provide necessary recommendations to the community provider and CSB to resolve identified concerns, and document steps on the post-move monitoring action plan. Recruit others who may assist; such as, CRC and Office of</li> </ul>	<ul style="list-style-type: none"> <li>• CRC</li> </ul>	<ul style="list-style-type: none"> <li>• By Referral                             <ul style="list-style-type: none"> <li>• Meet with individual in home setting</li> <li>• Review provider <b><u>ISP/PFS</u></b></li> <li>• Provide technical assistance as needed</li> <li>• Complete <b><u>PMM report</u></b></li> <li>• Share <b><u>PMM report</u></b> with CSB Support Coordinator (SC) via WaMS and CIM</li> </ul> </li> </ul>

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
	Integrated Health (OIH).		

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