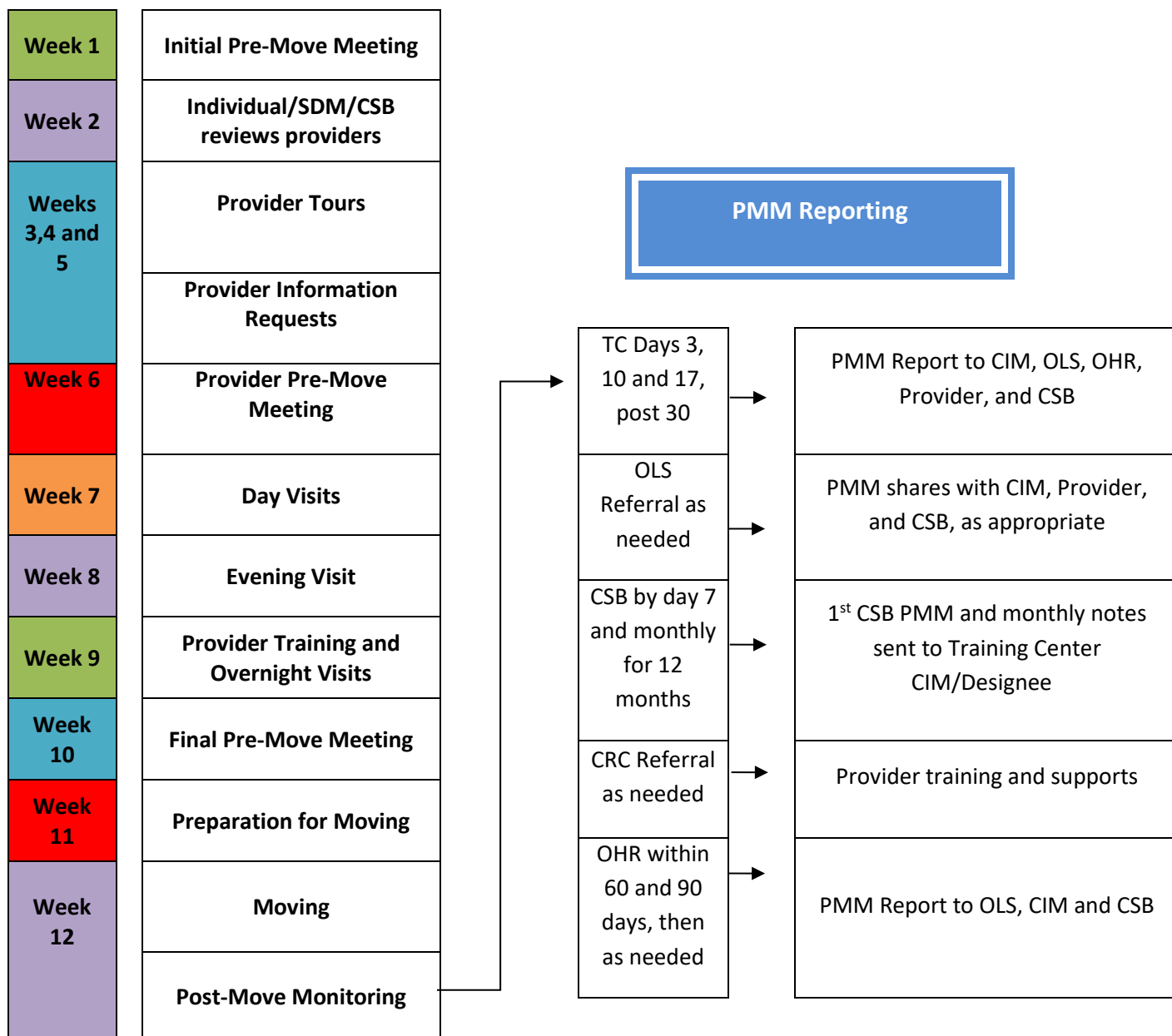


**Virginia's Training  
Center to Community  
Move Process**

**Active Move Status**

**PMM Reporting**



	Individual/SDM	Training Center	CSB	Provider	CIM	OL	CRC	OHR
Week 1	Initial Pre-Move Meeting*	Initial Pre-Move Meeting*	Initial Pre-Move Meeting*		Monitors active move list and oversees discharge planning process.			
	<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) Completed within 48 hours following the meeting and sent to the CSB, Provider (if identified) and SDM within 72 hours.  <b><u>First Draft of Equipment Worksheet Completed</u></b>	<b><u>Discharge Plan/ Discussion Record</u></b>		<b><u>Discharge Plan/ Discussion Record</u></b> (primary reviewer for all to ensure accuracy)			
			CSB SC participates in initial meeting, provides 3 potential provider options and works with TC to coordinate referrals for DARS, REACH, and other entities as applicable.		Ensures posting for CO access			
Week 2	Choose providers to tour	Coordinates TC and Individual attendance at provider tours	Participates in tours as needed/ available				Assists with identifying residential options, and other services as needed.	

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

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

	Individual/SDM	Training Center	CSB	Provider	CIM	OL	CRC	OHR
		Schedule tours with Individual/SDM/TC/Providers						
Week 3	Provider Tours	Provider Tours and identify additional options as needed	Provider Tours and identify additional options as needed.	Host Tours				
Week 4	Provider Tours	Provider Tours and identify additional options as needed	Provider Tours and identify additional options as needed.	Host Tours				
Week 5	Provider Tours	Provider Tours and identify additional options as needed	Provider Tours and identify additional options as needed.	Host Tours	If barriers to discharge are identified, steps to overcome the barriers will be developed and implemented.			
	Choose Provider	Communicate with CSB regarding chosen provider	Communicate with TC regarding chosen provider	Confirm Attendance at scheduled Pre-Move Meeting with CSB and TC				
Week 6	Provider Pre-Move Meeting*/** <b><u>Discharge Plan/ Discussion Record</u></b>	Provider Pre-Move Meeting*/** Update and review <b><u>Discharge Plan/</u></b>	Provider Pre-Move Meeting*/** <b><u>Discharge Plan/ Discussion Record</u></b>	Onsite observation/ Shadowing	Pre-Move Meeting*/** [review for 5+beds/NF/ICF and make RST	Receives and responds to <b><u>Provider Information Request</u></b> if there are		Attends Provider Pre-Move Meeting* Receives and responds to

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	Individual/SDM	Training Center	CSB	Provider	CIM	OL	CRC	OHR
		<u><b>Discussion Record and Equipment Worksheet</b></u> Confirm procurement method for DME	[Confirm provider choice – 5 beds, etc.]  CSB SC to schedule intake/PCP with provider, SDM, and individual to occur by final pre-move meeting.	Provider Pre-Move Meeting*/**	referral if needed] After Provider is chosen Submits <u><b>Provider Information Request</b></u>	potential concerns.  Provider site visit if OL determines necessary		<u><b>Provider Information Request</b></u>  Possible OHR Provider site visit
Week 7	Day Visits	Day Visits Responsible for coordination, supervision, and documentation	Day Visits (May join if available)	Day Visits	Review visit documentation and assist as needed to address any concerns			
Week 8	Evening Visit	Evening Visit Responsible for coordination, supervision, and documentation	Evening Visits (May join if available)	Evening Visit	Review visit documentation and assist as needed to address any concerns			
Week 9	Overnight/Weekend Visit	Arranges for Provider Training prior to overnight visit  Providers oversight and remains on call to respond as needed.		Receive Training Overnight/Weekend Visit  Submit <u><b>Plan for Supports</b></u> and other applications, documents required to	Review visit documentation and assist as needed to address any concerns			

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	Individual/SDM	Training Center	CSB	Provider	CIM	OL	CRC	OHR
				provide support				
Week 10	Final Pre-Move Meeting** Review <b><u>Discharge Plan/ Discussion Record</u></b>	Final Pre-Move Meeting* Review <b><u>Discharge Plan/ Discussion Record</u></b> and identify any outstanding action items needed to ensure essential supports are in place for discharge.	Final Pre-Move Meeting* <b><u>Discharge Plan/ Discussion Record</u></b>  Review Provider <b><u>Plan for Supports (PFS)</u></b> completes tasks for securing Waiver Slot	Final Pre-Move Meeting* <b><u>Discharge Plan/ Discussion Record</u></b> and confirm ability to provide essential supports.  [confirm PFS meets essential supports]	Final Pre-Move Meeting* <b><u>Discharge Plan/ Discussion Record</u></b> _Address any barriers or concerns related to proceeding with discharge		Provide technical assistance to CSB and Provider as needed for completion of discharge tasks.	Final Pre-Move Meeting* Participates, as needed
Week 11	Preparation for Moving	Preparation for Moving  Additional Provider Site Review if needed*	Additional Provider Site Review if needed*	Preparation for admission	Monitor progress and completion of tasks by all support partners			
Week 12	Moving	Moving Provides transportation and ensures deliver of all belongings, supplies, and equipment.	CSB gives TC final copy of CSB and provider <b><u>PCP/ISPs</u></b>	Moving	Provides guidance and oversight as needed			

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	Individual/SDM	Training Center	CSB	Provider	CIM	OL	CRC	OHR
Month 1		PMM Visit on Day 3*	PMM Visit by Day 7*					
		PMM Visit on Day 10*						
		PMM Visit on Day 17*						
Month 2		PMM Visit 45-60 days	Monthly PMM Visits*			PMM Visit by referral	PMM Visit by referral	PMM Visit on or about 60 <sup>th</sup> day
Month 3			Monthly PMM Visits*			PMM Visit by referral	PMM Visit by referral	PMM Visit on or about 90 <sup>th</sup> day

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
Initial Pre-Move Meeting	The meeting held that signifies the beginning of the “active move” process.	Individual/SDM	<ul style="list-style-type: none"> <li>Attends and helps facilitate meeting</li> </ul>
		PST	<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> <li>Assists with providing residential and day service options to the SDM and arranging tours</li> </ul>
		CSB SC	<ul style="list-style-type: none"> <li>Begins gathering documents needed for CSB intake process (Receives packet of Information from TC).</li> <li>Obtains <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>
		CIM	<ul style="list-style-type: none"> <li>Attends Meetings as possible to provide oversight and guidance</li> <li>Completes QA of meeting process and reviews DPDR</li> </ul>
Tours	To provide individual/SDM opportunity to visit providers, meet individuals currently being served, meet staff, and for	Individual/SDM	<ul style="list-style-type: none"> <li>May choose to tour on his/her 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
	all parties to ask questions related to what is important to/for the individual.	CSB SC	<ul style="list-style-type: none"> <li>Attends tours with individual/SDM as needed/available</li> </ul>
		Training Center	<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> <li>Completes documentation regarding tour outcomes</li> </ul>
Provider Information Request	Once provider has been selected to visit, used to gain additional information regarding provider's readiness for providing support to individuals	DCM/CIM or designee	<ul style="list-style-type: none"> <li>Sends out <b><u>Provider Information Request</u></b> and documentation regarding essential support needs to 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 informed choice and submit and RST referral.</li> </ul>
		OL	<ul style="list-style-type: none"> <li>If OL deems necessary, reviews home and sends response to CIM.</li> </ul>
		OHR	<ul style="list-style-type: none"> <li>Reviews home and sends response/finding to CIM.</li> </ul>
Provider Pre-Move Meeting	To review essential supports and develop a	Individual/SDM	<ul style="list-style-type: none"> <li>Attends and helps facilitate meeting</li> </ul>

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
	plan for the move to the chosen provider home.	PST	<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>
		CSB SC	<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 other community support providers and ensures scheduling with individual/SDM: Community Psychiatric, Medical, Behavioral Providers and Pharmacy</li> </ul>
		CIM	<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>

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
		Provider	<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>
		OHR	<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>
		Training Center Discharge Coordinator or designee	<ul style="list-style-type: none"> <li>Ensures trainings are scheduled.</li> <li>Ensures <b><u>discharge packet</u></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 and tentative discharge date.</li> <li>Ensures all training has been completed prior to unsupervised visits.</li> </ul>
Visits to Provider location	Day, evening and weekend/ overnight visits to chosen provider location to confirm good fit and ability to support.	Individual/SDM	<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>
		CSB SC	<ul style="list-style-type: none"> <li>Receives information from TC and provider regarding outcome of visits.</li> </ul>
		Provider	<ul style="list-style-type: none"> <li>Provides feedback to TC to complete <b><u>Community Home Visit form</u></b></li> </ul>
		Training Center	<ul style="list-style-type: none"> <li>Completes <b><u>Community Home Visit form</u></b></li> </ul>

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
Final Pre-Move Meeting	Final meeting to review visits and plan/confirm final preparations prior to move to new home.	Individual/SDM	<ul style="list-style-type: none"> <li>• Shares information regarding visits.</li> </ul>
		Training Center	<ul style="list-style-type: none"> <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>
		Provider	<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>
		CSB SC	<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>
		Training Center Discharge Coordinator or designee	<ul style="list-style-type: none"> <li>• If needed, schedules site review with CSB.</li> <li>• Confirms needed medical equipment is in place</li> <li>• Arranges for transportation and ensures medications, prescriptions and discharge documentation is prepared for the move</li> </ul>
		CIM	<ul style="list-style-type: none"> <li>• Completes final review and ensures all steps of the moving process have been completed.</li> </ul>

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
Provider Site Review if needed		CSB SC	<ul style="list-style-type: none"> <li>Confirms needed medical equipment in place and all environmental modifications have been completed</li> </ul>
		Training Center Discharge Coordinator	<ul style="list-style-type: none"> <li>Confirms needed medical equipment in place and all environmental modifications have been completed</li> </ul>
Day of Move		Training Center	<ul style="list-style-type: none"> <li>Supplies and reviews medications/prescriptions.</li> <li>Provides any additional information to provider</li> <li>Completes internal tasks related to 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 Record are being provided.</li> <li>Monitor the individual's adjustment to his/her</li> </ul>	Training Center	<ul style="list-style-type: none"> <li>Completes 3, 10 and 17- and 45–60-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 CIM, provider and CSB SC</li> </ul>
		OL	<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>
		OHR	<ul style="list-style-type: none"> <li>Visits within 60 and 90 days of move, and then as needed.</li> <li>Complete <b><u>PMM Report</u></b></li> <li>Share <b><u>PMM Report</u></b> with CIM</li> </ul>
		CSB SC	<ul style="list-style-type: none"> <li>Visits by day 7 and monthly for 12 months, then follows case management guidelines</li> </ul>

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Primary Tasks and Core Responsibilities			
Task	Purpose	Roles	Core Responsibilities
	new home and supportive employment or day program.		<ul style="list-style-type: none"> <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 Discharge Coordinator and or CIM for first year.</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 Integrated Health (OIH).</li> </ul>	CRC	<ul style="list-style-type: none"> <li>By Referral</li> <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>

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