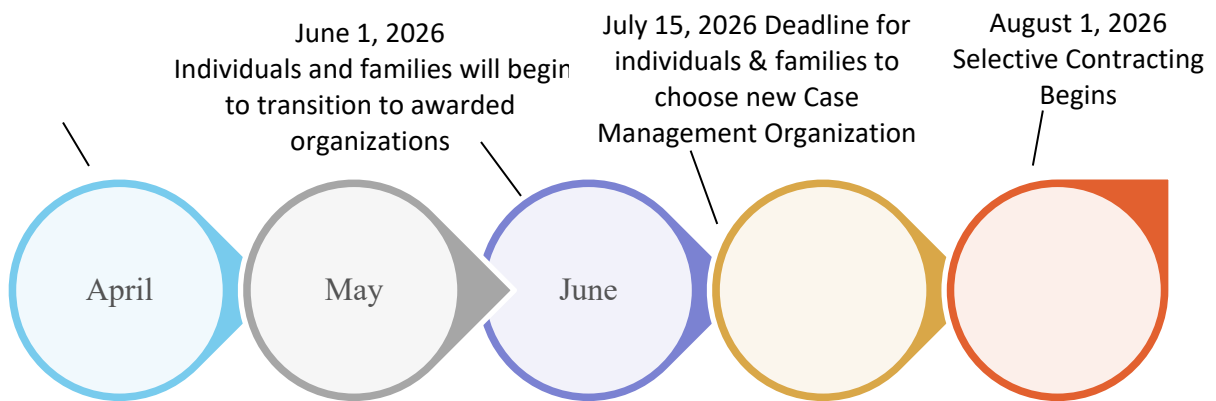


# TRANSITION TOOLKIT – CASE MANAGEMENT ORGANIZATIONS LEAVING BDS WAIVER SERVICES

The Bureau of Disabilities Services would like to thank you for your partnership in providing case management services. As a company who was not awarded a contract through the selective contracting process, we are providing you this transition toolkit to ensure you have the information necessary to ensure a smooth transition for those individuals and families on your caseloads.

**IMPORTANT:** As part of the required monthly contact with individuals and families **all case managers** MUST discuss and share the information and resources provided by BDS to ensure understanding of the transition and freedom of choice. This must be documented in case notes and is a requirement to bill for the monthly contact. More detailed information is included later in this toolkit.

## GENERAL TIMELINE



**Individuals should begin transitioning to awarded organizations beginning June 1<sup>st</sup>, 2026.**

## INDIVIDUAL CASE FILES

Having up to date and correct information for each individual receiving BDS HCBS waivers is critical for the individual's health, safety and delivery of quality home and community-based services. This transition presents an opportune time to ensure that every individual's information and documentation is accurate.

## Demographics

By June 30, 2026, Case Management Organizations must generate, review, and ensure case managers take necessary actions to verify, update, or correct demographics for all individuals served.

- [Client Demographic Report](#)
- [Guardian Report](#)

While ongoing monitoring is expected, Case Management Organizations will repeat these activities as they transition individuals case files to ensure the accuracy of files and information as the individual transitions to their new Case Management Organization.

Case managers should follow up with individuals and/or guardians who have expressed intent or interest in guardianship changes or relocating prior to June 30, 2026. Issues related to potential changes to setting, geographic location, guardianship or emancipation should be case noted with clarity on the potential changes and known timeframes.

As applicable, outstanding or pending issues related to relocation or guardianship changes that have not occurred by or at time of the individual is transitioned to their new Case Management Organization, must be case noted in the Portal.

## Monitoring

By June 30, 2026, Case Management Organizations must generate, review, and take necessary actions to rectify discrepancies, deficiencies, and any incomplete or untimely monitoring activities required by BDS.

- [Monitoring Checklist/PCMT Expiring/Expired Checklist Report](#)

While ongoing monitoring is expected, Case Management Organizations will repeat these activities as they transition individuals case files to ensure the accuracy of files and information as the individual transitions to their new Case Management Organization.

As applicable, outstanding issues that could not be rectified by (or at) the time of the individual is transitioned to their new Case Management Organization, must be case noted in the Portal.

## Medicaid Issues

Case Management Organizations should be taking necessary actions to support individuals and families to rectify any issues or barriers that are preventing them from accessing or being approved for the Medicaid state health plan. These can be identified by the following report:

- [Medicaid Issues Report](#)

As applicable, outstanding issues that could not be rectified by (or at) the time of the individual is transitioned to their new Case Management Organization, must be case noted in the Portal.

## Incident Reporting

By June 30, 2026, Case Management Organizations must generate, review, and ensure case managers take necessary actions toward timely follow-up and closure of all incident reports appearing on the following report:

- [Open IR Report](#)

While ongoing monitoring is expected, Case Management Organizations will repeat these activities as they transition individuals case files to ensure the accuracy of files and information as the individual transitions to their new Case Management Organization.

As applicable, outstanding issues related to IRs that cannot be closed or resolved by (or at) the time of the individual is transitioned to their new Case Management Organization will be case noted in the Portal.

## Timely Completion

Case managers must ensure that all timelines and submissions of all required activities are being met. Outstanding or pending issues that have not been resolved at or by the time individuals' transition to new Case Management Organization, must be case noted in the Portal.

## Case Management Billing

As noted above, as part of the required monthly contact with individuals and families **all case managers** MUST discuss and share the information and resources provided by BDS to ensure understanding of the transition and choice. This must be documented in case notes and is a requirement to bill for the monthly contact. This must occur the months of May, June, and July unless a new choice list has been signed. If a choice list has been obtained, case notes for the following months should provide an update on the transfer to an awarded Case Management Organization. In addition, case managers should be providing these updates to the individuals and families.

Resources should be available and offered to individuals and families in electronic and paper formats using whatever tools necessary to effectively and efficiently communicate with each individual by whatever means is preferred by the individual. The required discussion points and resources are as follows:

## May 2026

Discussion Points	Related Resources
<p>What selective contracting waiver for case management means</p> <p>Which Case Management Organizations were awarded</p> <p>The impact that requires them to choose new Case Management Organization</p>	<p>Copy of letter that was mailed by BDS</p>
<p>Overview of the transition timeline</p>	<p>Individual and Family Toolkit</p>
<p>Freedom of Choice ensuring they understand their right to change Case Management Organizations at any time, for any reason</p>	<p>Updated Choice List</p> <p>Considerations when choosing a new Case Management Organization</p>
<p>How to find and obtain information and updates on case management</p>	<p>Webinar Opportunities for Individuals &amp; Families Flyer</p>
<p>How to contact BDS district offices and how they can help to answer questions</p>	<p>BDS District Map with contact information</p>

## June 2026

Discussion Points	Related Resources
<p>What selective contracting waiver for case management means and the impact that requires them to choose new Case Management Organization</p>	<p>Copy of letter that was mailed by BDS</p>
<p>Identify awarded Case Management Organizations and assist in choosing a new company.</p>	<p>Updated Choice List</p> <p>Considerations when choosing a new Case Management Organization</p>
<p>Overview of the transition timeline</p>	<p>Individual and Family Toolkit</p>
<p>How to contact BDS district offices and how they can help to answer questions</p>	<p>BDS District Map with contact information</p>

## July 2026 \* Must occur prior to the July 15, 2026, deadline\*

Discussion Points	Related Resources
<p>What selective contracting waiver for case management means and the impact that requires them to choose new Case Management Organization no later than July 1, 2026</p> <p>Ensure understanding of the requirement to have case management services and explain that they will be auto assigned a case management if they don't choose one.</p> <p>Ensure understanding of their right to choose and that at any time they can change to different approved Case Management Organization for any reason.</p>	<p>Copy of letter that was mailed by BDS</p>
<p>Identify awarded Case Management Organizations and assist in choosing a new company.</p>	<p>Updated Choice List</p> <p>Considerations when choosing a new Case Management Organization</p>
<p>Overview of the transition timeline</p>	<p>Individual and Family Toolkit</p>
<p>How to contact BDS district offices and how they can help to answer questions</p>	<p>BDS District Map with contact information</p>

### Individuals moving to awarded Case Management Organization

Current processes related to the transfer of case management services from one Case Management Organization to another apply to any transitions of individuals to one of the newly awarded Case Management Organizations.

*As a reminder, providers shall not engage in uninvited solicitation of potential clients, who are vulnerable to undue influence, manipulation, or coercion. If case managers share that they are leaving their current employer and are asked by an individual (uninvited) where they are going to work, this would not be viewed as solicitation in violation of 460 IAC 6-36-2. In addition, case managers are encouraged to follow up with their employers regarding any company policies on this issue.*

## Choice List

The choice list will be updated in June to reflect which Case Management Organizations have been awarded a contract and which will no longer be available to provide case management effective August 1, 2026. An update will occur again in July 2026 to reflect only the awarded and contracted Case Management Organizations.

Individuals new to waiver services will have the freedom to choose from the choice list provided during the time they begin waiver services. If the individual or guardian choose a Case Management Organization that was not awarded a contract, they will be advised that they will need to pick an awarded Case Management Organization by July 15, 2026. If individuals new to waiver services pick a not awarded Case Management Organization during this time, the case manager is still responsible for completing the required monthly activities listed above.

## RESPONSIBILITIES OF CASE MANAGEMENT ORGANIZATION

Case Management Organizations who are not awarded contracts remain obligated to perform the functions outlined in the provider agreement and 460 IAC through July 31, 2026.

You must provide at least sixty (60) days written notice to the individual and guardian using the provided template. The written notice must be sent to all individuals and guardians on or before 5/31/2026. This notice should include information on the transition timeline, the Case Management Organization's commitment to assist through transition and how to choose a new Case Management Organization.

You must coordinate the transfer of case management services to the new chosen Case Management Organization in a timely manner that is consistent with current standards, policies and regulations.

You must continue serving the individual until the new Case Management Organization is in place.

## Access to Systems

For case managers and staff who leave your employment, the Case Management Organization must follow the normal process for removing access to state systems in a timely manner. If multiple users are leaving at the same time, one termination notice for all departing users may be submitted. Upon notification, BDS will deactivate the IOT accounts, accounts, Training accounts, SAP accounts, and PSIDs (if applicable).

This policy must be followed even if a case manager is leaving your Case Management Organization for employment at another Case Management Organization.

## Transfer of Case Files

All transfers of files will take place as outlined in the transition process. No files or personal information should be taken with case managers or Case Management Organization staff.

## SUPPORT THROUGH TRANSITION

The BDS teams are here to support you through the transition. Through collaboration and partnership, we can work together to support individuals and families through a smooth transition. The following avenues remain available for specific questions or needs that arise:

- BDS Helpline ([BDS.Help@fssa.IN.gov](mailto:BDS.Help@fssa.IN.gov)): BDS helpline is to provide general information regarding BDS programs and services. All inquiries are assigned to the appropriate staff to be address, including suggestions and concerns.
- JIRA Helpdesk Web Portal (<https://dmha.fssa.in.gov/helpdesk/?div=ddrs>): For system issues related to general log in and navigation; monitoring checklist/PCMT; PCISP; transition; provider web tool; Citrix; claims and billing; document library; IFUR;
- Lisa Davis ([Lisa.Davis@fssa.in.gov](mailto:Lisa.Davis@fssa.in.gov)): The case management liaison is available to provide guidance and direction when other means have not been successful or available.