

Appendix EE: CM Internal Case Transfer Checklist

The CM Internal Case Transfer Checklist is included on the following page as a pre-printed technical insert.

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Check list for Internal Case Transfers – CM to CM

Client:

Current CM:

Supervisor:

New CM:

Date of Intended Transfer Given by CS: Click or tap to enter a date.

Date of Checklist Completed by Current CM: Click or tap to enter a date.

Date of Transfer by CS: Click or tap to enter a date.

Date of Checklist Completed by New CM: Click or tap to enter a date.

***Current CM- If there is strong consumer opposition of transfer, then inform your Clinical Supervisor immediately.

***New CM- Notify your Clinical Supervisor immediately if you find any discrepancy upon receipt and review of the case.

Current CM

- ☐ Contact consumer/family/guardian/provider and advise of CM Transfer and your ongoing support
- ☐ Schedule or assure that you will formally face to face or conference call to introduce the new CM Click or tap to enter a date.
- ☐ Have conversation with new CM to provide background and pertinent case information
- ☐ Ensure accurate information in CM Portal (relationships, address, etc.)
- ☐ LOCSI Current Click or tap to enter a date.
- ☐ Service Plan (CCB) Current Click or tap to enter a date.
- ☐ PCISP Current Click or tap to enter a date.
- ☐ Monitoring Checklist Current Click or tap to enter a date.
- ☐ Ensure documentation is current and up to date (Risk Plans, BSPs, FBAs, Provider Reports, etc.)
- ☐ Case Note for all transfer activities Click or tap to enter a date.
- ☐ Email form to Clinical Supervisor Click or tap to enter a date.

Please include any special circumstances or case management support needs here:

Clinical Supervisor

- ☐ Case Review
- ☐ Enter Transfer Case Note Click or tap to enter a date.
- ☐ Email form to New CM Click or tap to enter a date.

New CM

- ☐ Review Documentation (familiarize yourself with your new consumer through document library)
- ☐ Call/Email consumer/family/guardian/provider as applicable to follow up, confirm next meeting date, offer support within one week of transfer
- ☐ Case Note activity from contacting consumer/family/guardian/provider Click or tap to enter a date.
- ☐ Email form to Clinical Supervisor Click or tap to enter a date.