

## PORTING PROCESS – August 2, 2017

At least annually or when the member indicates, the Waiver 5 Freedom of Choice is completed. If, while completing the Waiver 5 Freedom of Choice, the member chooses to receive some or all of their 0208 Comprehensive Waiver services from a different qualified provider, the following steps are followed:

- 1) The Case Manager obtains a signed release of information from the member and the court-appointed legal guardian (if applicable) allowing information to be shared with potential provider(s).
- 2) The CM notifies all team members (including the Quality Improvement Specialist) of the member's choice of a different qualified provider
- 3) If the member is changing service settings, i.e. group home to supported living, the MONA must be updated by the CM to reflect the change.
- 4) If the member has not selected a qualified provider, the CM places the person's name on the Porting List (via the designated Administrative Assistant at a DDP Regional Office);
- 5) The CM contacts the potential qualified provider(s).
- 6) If a provider expressed an interest in providing services to the member, the CM provides a copy of:
  - Plan of Care
  - ICP Annual Maximum amount (or dollars available for the portion of the ICP the person desires to port). The ICP Maximum amount cannot exceed the person's MONA allocation for the new service type.
  - Current assessment information regarding medical, behavior, mental health needs
- 7) After receipt of the above information, if the provider is interested in providing services to the member, the qualified provider must submit a written proposal to the Case Manager. The proposal must include:
  - Service Type and frequency
  - How the services will meet the member's assessed needs with the approved ICP Maximum amount.
  - The date the member would begin receiving services.
  - The provider contact person for the CM and member.
- 8) If, after a review of the information, the provider declines to submit a proposal, the provider notifies the case manager of the decision in writing.
- 9) The CM notifies the member's current planning team of the service proposal from the qualified provider(s) and schedules a team meeting (with representation from the provider(s) who submitted proposal(s) and QIS) to review the proposal.
- 10) If the team agrees the service proposal will meet the member's assessed needs, a start date is negotiated between the current provider and new provider.
- 11) If necessary, the CM completed a Waiver 5 freedom of choice to update the provider.
- 12) The CM notifies the Regional Manager of the outcome of the team meeting, and the proposed start date.
- 13) The CM provides the QIS with a copy of the Waiver 5 Freedom of Choice form.
- 14) Once the member has selected a provider and completed the Waiver 5 Freedom of Choice, the CM removes the person from the Porting List.
- 15) The Regional Manager and CM work to update the ICP