MONTANA DPHHS
Healthy Communities

Department of Public Health and Human Services

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Steve Bullock, Governor

Richard H. Opper, Director

July 13, 2016

CFC/PAS Providers
HCBS Big Sky Waiver Case Manager Leads
Regional Program Officers (RPO)

RE: Plan Facilitator Change: Intake to Waiver/Case Management

The Community Services Bureau (CSB) has reviewed the Community First Choice policy manual section CSB 1109 and added information to clarify expectations in this policy memo for the completion of the Person Centered Plan (PCP) Form (SLTC-200) when a case manager becomes the Plan Facilitator. Clarification has been provided as it relates to the timing of the Plan Facilitator transition based on completion of the MA-55.

Please place this policy memo at the beginning of section CSB 1109 of your Community First Choice and Home and Community Based Waiver policy manual. This policy is effective immediately:

PROCEDURE

Scenario 1: Member Admit to Waiver-Case Manager becomes the new Plan Facilitator

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a. The case manager becomes the Plan Facilitator when the case manager receives the completed MA-55 and the case manager completes an in-person visit with the member to complete a new PCP form. Until this occurs the Plan Facilitator is the CFC/PAS provider agency.

Regardless if the waiver team has completed the waiver intake paperwork prior to receiving the MA-55, the Case Manager Plan Facilitator <u>must</u> complete the PCP form within 10 working days of receiving the MA-55 and officially enrolling the member on waiver. If the waiver team has not completed the waiver intake, the Case Manger Plan Facilitator must complete the PCP form in conjunction with completion of the waiver intake paperwork.

g.

i. Option 1: The member, provider, and Case Manager Plan Facilitator have the option of completing the member's new

CFC/PAS PCP form and coordinating the PCP transition in a joint visit.

The coordinated visit will occur at the location determined appropriate by the case manager and member. The case manager is responsible to contact the appropriate individuals for the meeting.

ii. Option 2: The member, provider, and Case Manager Plan Facilitator have the option of coordinating the CFC/PAS PCP form and PCP transition over the phone. Prior to coordinating the transition the Case Manager Plan Facilitator must complete the PCP Form in-person with the member.

The Case Manager Plan Facilitator must obtain the appropriate signatures and distribute the plan within 30 days of completion of the PCP form. A coordinated CFC/PAS PCP visit must occur within six months of the member official enrollment in waiver services. This can be done at the member's next case management visit.

4. The new Plan Facilitator (case manager) must review the current PCP form with the member during the visit and complete an updated PCP form with the new Plan Facilitator's signature.

Sincerely,

Abby Holm, CFC/PAS Program Manager

cc: Jill Sark, Bureau Chief
Kieran Roberts, Program Manager
LaDawn Whiteside, Program Manager