



Shawnee County  
Community Developmental Disabilities Organization  
"Your resource for connecting our community"

## TARC POLICY MANUAL – CDDO SECTION

<b>Subject: Changing Targeted Case Management Services</b> <b>Effective Date: 12-15-97</b>	<b>Reviewed: 08-24-09</b>	<b>Policy No: 06-014</b>
<b>Revised:</b> 11-05-01, 09-16-02, 04-22-03, 10-20-03, 04-01-04, 05-15-06, 08-30-07, 08-24-09, 05.24.10	<b>Forms:</b> 06-038.001 Plan of Care; 06-009.001 Service Provider Transition Meeting	

**POLICY: All eligible persons and/or their guardian will have the opportunity to choose an affiliated Targeted Case Management (TCM) provider.**

### GUIDELINES:

1. An individual currently receiving TCM or their guardian may change their TCM provider at any time. The current Targeted Case Manager will facilitate the change to the new Targeted Case Management provider.
2. The CDDO Representative or Case Manager will make available to the individual and/or guardian the Case Management Affiliate list to identify the case management providers open for referrals.
  - a. Upon identification of a new TCM provider the former TCM provider will be informed in writing of the request for change.
  - b. The current TCM provider will cooperate in exchanging all necessary documentation to assure a smooth transition of services. Transition meetings are required as specified in CDDO policy 06-009.
  - c. All requested documentation as approved by HIPAA standards will be forwarded to the new TCM provider within five (5) business days upon receipt of notification of change in TCM Services.
  - d. The new TCM provider will forward a revised Plan of Care (POC) form 06-038.001 and BASIS III to the CDDO Funding Coordinator.
  - e. The current TCM is required to submit transition meeting minutes on form 06-009.001 in the web based system (BCI).
3. An individual seeking new or different TCM services may contact the CDDO for assistance at any time.
  - a. The CDDO will encourage and advise the person to notify the current TCM provider prior to contacting a new TCM provider, but will not require they do so.
  - b. The CDDO will provide the person with all their options for TCM services including working with the current TCM provider to resolve any unmet needs or obtaining TCM services from a different provider.
4. Individuals will notify the CDDO Quality Management Coordinator (QMC) of any concerns, issues or complaints surrounding the decision to change TCM providers or violation of CDDO policy 06-014.
5. Changes in TCM providers will be tracked by the Shawnee County CDDO.