

CLIENT TRANSFER/MOVE FROM ONE AAA TO ANOTHER AAA

Clients requesting transfer from one area to another will be given priority status to access service dollars in the receiving AAA, regardless of funding source.

RATIONALE

AAAs are committed to client rights to relocate within the State without loss of services that are managed by Area Agencies. To assure uniformity in implementation, IAAAA and its members have adopted this policy.

APPLICABLE FUNDING SOURCES:

- ❑ Social Service Block Grant, Older Americans Title III, CHOICE
- ❑ Waivers with area “Targeted” process will also coordinate this policy with assistance of BAIHS Medicaid Unit
- ❑ Waivers that are managed statewide, i.e., Aged and Disabled are not affected by this policy
- ❑ Other funding that is managed by AAAs and allow the flexibility of “client choice” in location

IMPLEMENTATION DATE

Effective immediately

PROCEDURE

A. Active clients currently on services

Originating agency will contact receiving agency regarding transfer of client

1. If there ARE service dollars available at the receiving agency

- a. Originating agency will forward appropriate information to the receiving agency. Information that will be sent (if available) is:
 - Assessment and e-screen
 - Notation or copy of original application date and relevant notes
 - 30 days of documentation notes
 - Other appropriate information
- b. The receiving agency will visit client and follow their agencies policies regarding authorization of services and care plan management

2. If there are NOT service dollars available

- a. The client’s name will be placed on the receiving agency waiting list and will receive services based on the receiving agency’s procedures.
- b. Before implementing a new or revised care plan, the receiving agency will submit a new Plan of Care for approval.
- c. Until the client’s services are paid by the receiving agency, the originating agency will pay for the client’s services.
- d. The receiving agency will bill the originating agency monthly for services. The paying agency will report required demographics, fiscal information, etc., until the client and their service expenditures are the responsibility of the receiving agency.

Note: Only service dollars will be reimbursed between agencies. It is not cost effective to include administrative and case management cost in the billing based on the potential brief period these individuals will be associated with two agencies.

- e. When the client is transferred to the receiving agency fiscal budget, the agreement between the agencies will be terminated.

B. Clients on Grandfather CHOICE

1. The Grandfather CHOICE agency will use the above procedure process, "If there are NOT service dollars available." Case Management billing will be negotiated between the two agencies based on potential time client is associated with two agencies.