Individual's Name		Completed for SL, GH, GTH only
ADSA ID Number	Move Date	Completed for Youth
Individual's Stated Transition Goal		Completed for AFH / ALF / ARC / EARC

Developmental Disabilities Administration (DDA)

Transitional Care Planning Tracking
Part A: Transition Preparation

Purpose: This document is required to be used as a facilitation guide and task tracker for DDA staff coordinating a move from one setting to another. Case Managers will use this document to track progress and highlight individual needs and readiness to transition safely to their identified setting.

A. Transition Preparation: Individual requests to move to a new setting

Transition preparation consists of the tasks that are needed to identify the individual's goals and support needs, identify preferred setting to live, and review eligibility for applicable programs.

Activity	Notes or Update	Completed
Discussion with the individual, family, or guardian regarding their desire to transition.		☐
Review CARE: Complete DDA Transition Tracking in CARE – add a Preparation event		☐
Review CARE: Assist to complete and/or update client profile. TCU: Complete MyPage or Person- Centered Plan		☐
Review CARE: Review assessment		☐
Discuss living options and identify preferred living arrangements.		☐
Determine financial eligibility for applicable programs		☐
Discuss obstacles or unmet needs to be addressed for successful transition		☐
Have conversation with guardian about providing needed legal documents (refer to form DSHS 10-635, Residential Transition Exchange of Information): • Washington State ID, • Current legal decision-making paperwork, • Social Security Card, • Insurance cards, and • Any other legal documents.		☐
Complete One Referral using form DSHS 10-232, Provider Referral Letter for Residential Services, as a cover sheet and submit the full referral packet through One Referral Portal		☐
Youth: If seeking OHS or RHDY options, staff with your regional OHS coordinator for next steps.		☐
Ensure visit to the home, virtual visit, photos, or a video are coordinated between individuals and providers.		☐

Review the need for any home modifications needed prior to moving.		☐
Best Practice: Confirm that the individuals have met and agree to live together.		☐
AFH: Work with AFH PQIS staff, review provided list, provide options to individuals / guardians. Monitor and support as needed.		☐
AFH: Confirm with AFH PQIS that AFH is contracted and has DD specialty training.		☐
AFH: Confirm provider has reviewed assessment and accepts current rate.		☐
AFH: Process ETR if requested.		☐ Submitted ☐ Approved
SL Referral: Monitor and work with providers and individuals / guardians to explore options.		☐
SL Referral: Monitor referrals. Work with providers, individual / guardian to explore options. Check in RRTS for updates on referral progress.		☐
Youth: If seeking OHS or RHDY options, staff with your regional OHS coordinator for next steps.		☐
Confirm mutual agreement. When the individual has chosen a provider to meet their care needs and the provider agrees to provide care.		☐

DDA Internal Handoff: After mutual agreement is confirmed an internal DDA handoff meeting should be scheduled within one week if transferring to a new DDA CRM. DDA staff collaborate to review the individual's goals, understand their support needs and create the transition team. This should include a conversation on how the individual and their guardian/representative would like to participate in the meetings and receive updates about the transition. The initial transition meeting marks the beginning of the Active Coordinator of Transition (ACT) stage.

Review Policy 3.02 for instructions on case transfer and interoffice / interregional moves.

Sending CRM Name	Receiving CRM Name	Date
Meet with current and new provider and case manager(s) and ensure new residential provider has copies of all relevant documents on the form DSHS 17-345, Transitional Care Management Provider Exchange of Information, checklist. Document any missing items.	Notes	Date: ☐ Provider Declined to meet ☐ Completed and form uploaded to RMT