Policy and Procedures for MFP Shared Division Participants

While MFP participants may be enrolled with the Department on Aging (DOA), the Department of Human Services' Division of Mental Health (DMH), Division of Rehabilitation Services (DRS) or the Division of Developmental Disabilities (DDD); each participant in MFP may present with an array of physical and mental health conditions, functional limitations and/or psychosocial needs. Frequently, responding to this array of needs requires consultation with agencies outside the Division/Department with which the participant is identified. In those situations and in order to facilitate coordinated care and best practice, the transition coordinator (TC) from the Division/Department with which the participant is identified remains the lead. That TC remains fully responsible for the holistic care management for the participant, including all of the activities of a TC within MFP, such as the risk assessment and mitigation plan. Staff from the agency consulting on the transition will use their knowledge base to assist in the identification and the procurement of the services available to address needs in those areas with which they are most familiar. **MFP participants who have been diagnosed with a serious mental illness will always have a lead transition coordinator from the Division of Mental Health.**

MFP-DMH Services are currently available in the following counties: DuPage, Kane, Lake, Madison, McHenry, Peoria, Sangamon, St. Claire, and Will

Procedures

1. **TES/TC Conducts Initial Contact and Assessment:** The TC schedules and conducts the initial contact/assessment and determines possible need for MFP cross-division consultation. If an Aging and Disability Resource Center (ADRC) is active in the county, the Transition Engagement Specialist (TES) includes the recommendation for MFP cross-division consultation in the mini-assessment that is uploaded to the case in the CRM Dashboard prior to referring the case to a TC. The TES might make note of specific services that would be beneficial. The TES shall not refer the case to other community agencies at this time.

2. **TC determines MCO enrollment**: The TC determines whether the individual has a health plan operated by a Managed Care Organization (MCO) that will authorize and fund health, home, and community-based services. If the participant is enrolled in an MCO, then the TC contacts the MCO to inform them of the MFP referral and to include the MCO Care Coordinator in the care planning process. The TC shall make this documentation in the CRM Dashboard participant's case notes.
    - In the case of an individual with a serious mental illness who also requires DRS or IDOA waiver services, a DON is required to access DRS or DOA services. The local CIL or CCU will

be involved as a consulting agency, even in the case of an MCO enrollee, in order to complete the DON and facilitate service approvals specific to the Division/Department.

3. **<u>TC Requests Case Overview Mini-Conference with UIC/MCO</u>:** The TC who has made the initial contact/assessment shall contact the appropriate UIC conference call scheduler and copy MCO staff to arrange an initial case overview call to discuss the possible need for consultation across MFP Divisions/Departments. The timing of this mini-conference would be after initial TC contact with the participant and during the initial engagement (informed consent) process. This is a new type of case review call that is not as comprehensive as the pre-transition case review which will still take place when the participant is closer to transition. The mini-conference could be a scheduled meeting or a more informal call, depending on the circumstances. MCO collaborating staff and Division/Department lead staff should be included in discussions.

4. **<u>Mini-Conference Occurs</u>**: During the mini-conference call or email, the lead TC provides an overview of the needs of the participant and provides a rationale for cross-Division/Department consultation. If this conference determines that there is no need for consultation, the TC documents this in the CRM Dashboard participant case notes, and these procedures do not continue. If the determination is made that consultation is necessary, these procedures continue.

5. **<u>TC Initiates Case Collaboration</u>:** The TC, along with UIC, determines which Division/Department and community agency shall become involved with the case as a consultant. The TC contacts the appropriate Division/Department and community agency staff by email to initiate/request the consultation process and copies all other collaborating staff on this request including UIC, MCO and Division/Department leads. The TC uses the CRM Dashboard MFP case number (e.g., MFP-001200) to identify the participant to the consulting agency. Participant name, RIN, address or other identifying information should not be listed in emails. UIC staff shall establish read-only CRM Dashboard access for the consulting Division/Department staff. Consulting staff will have the ability to upload documents to the Attachments section of the participant's case in the WebApp, such as service approvals, assessments, case/visit notes and other Division/Department-specific documentation.

6. **<u>Pre-Transition Planning</u>**: Once the case collaboration has been established, the TC may engage the collaborating agency at any time during the pre-transition planning and assessment process in order to be informed of the resources available, discuss service options, and identify timeframes required to complete assessments and to implement the services which may be included in the participant's service plan. The service plan itself will not be implemented until the TCs comprehensive assessment is completed. The TCs will document their activities on behalf of the participant and their contacts with the participant in the CRM Dashboard in a timely way, ideally,

within one to two weeks, so that the TES and others involved in the case may be aware of the participant's current status.

7. **<u>Ongoing Collaboration and Staffings</u>:** UIC shall include the appropriate Division/Department and community agency staff on the pre-transition conference call, the 30-day post-transition call and on other calls depending upon the participant's needs and the delineation of roles and responsibilities in individual cases.
    - The consulting agency will be able to provide relevant information and identify potential risks during the pre-transition conference call. The TC shall use information from the consulting agency to ensure the risk assessment and mitigation plan is comprehensive and it shall be the TCs responsibility to complete these and all other pre and post transition forms in the CRM Dashboard.

MFP Shared Case Policy Process

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