



Current Status: Active

PolicyStat ID: 10031942



Date Issued: 9/1/1998
 Effective: 7/1/2021
 Last Approved Date: 7/6/2021
 Last Revised Date: 7/6/2021
 Next Review: 6/30/2023

Owner: Dana James: Integrated Services Manager- Quality Assurance
 Policy Area: Wraparound (Wrap, REACH, youth CCS)-Care Cord.

References:

#006 Care Coordinator Changes

I. POLICY

In keeping with Children's Community Mental Health Services and Wraparound Milwaukee philosophy of partnering with youth and families, listening to their needs and providing the best possible match, it is the policy of Children's Community Mental Health Services and Wraparound Milwaukee to initiate the following procedure when a change of a Care Coordinator and/or Care Coordination Agency is requested by a youth/family or an Agency.

The youth and family have a right to request a change of their Care Coordinator and/or the Care Coordination Agency at any time for any reason. There will not be a negative consequence or reproach towards the youth and family.

NOTE: This policy utilizes the term "Care Coordinator", which applies to Wraparound, REACH, CORE, and CCS Care Coordinators. The term "Youth" is used in this policy and applies to the enrollee in the program, whether a child, adolescent, or young adult.

II. PROCEDURE

A. Transfers – The transfer process is individualized based on the specific needs of the youth, family and the team.

1. Intra-Agency Transfer: a change within the current Care Coordination Agency

- If the youth/family request a transfer in the Care Coordinator, it is the responsibility of the Agency to facilitate a Team Meeting to determine the unmet needs of the Child and Family Team, and assist in problem solving of how to best address these needs.
- If a change in a Care Coordinator is determined to be necessary and appropriate, the youth/family and the Care Coordinator Supervisor, will determine a new Care Coordinator and an appropriate transfer date. The Supervisor must document in a Note the conversation they had with the family and who will be the new CC and the agreed upon transfer date.
- If a change in a Care Coordinator is determined to be necessary and appropriate, the Supervisor and/or existing Care Coordinator must schedule and attend a **face-to-face meeting** with the family to introduce the new, potential Care Coordinator. It is the responsibility of the Supervisor to actively seek feedback from the family about the change. If the family does not

want the existing Care Coordinator to attend, the Supervisor must schedule and facilitate the transfer.

2. Inter-Agency Transfer: a change to a different Care Coordination Agency

- a. If the youth/family request a transfer in the Care Coordinator **and** Care Coordination Agency, the Agency is responsible to notify Children's Community Mental Health Services and Wraparound Milwaukee.
- b. Following this notification, a member of the Children's Community Mental Health Services and Wraparound Milwaukee Management Team will determine whether a Child and Family Team Meeting is needed and appropriate to discuss the request. If deemed appropriate, the existing Care Coordination Agency will be responsible to facilitate the Child & Family Team Meeting to determine the unmet needs of the Team and assist in problem solving of how to best address these needs.
- c. If a change in a Care Coordinator Agency is determined to be necessary and appropriate, Children's Community Mental Health Services and Wraparound Milwaukee, the youth/family and the new Care Coordinator Supervisor, will determine a new Care Coordinator and an appropriate transfer date.
- d. The existing Care Coordination Agency is responsible for ensuring that all paperwork is current and up-to-date prior to the transfer date. The existing Care Coordination Agency is responsible for providing/delivering the youth's hard-copy file to the new Care Coordination Agency within 2 business days from the transfer date.

B. Once a transfer (Intra-agency or Inter-agency) is determined to be necessary, the following actions are required:

1. The current (Intra-agency transfer) or existing (Inter-agency transfer) Care Coordination Agency is responsible for:

- a. Notifying **all team members** of the transfer information
 - i. Transfer date
 - ii. Name of the new Care Coordinator
 - iii. Contact Information of the new Care Coordinator

Note: Notifications to team members must be reflected in Synthesis.

- b. Completing and providing/mailling a copy of the Transfer Notification Letter (Attachment #1) to the youth and family and upload a copy into Synthesis under File Store.
- c. Enter the transfer information into the transfer tab in Synthesis.

Note: Children's Community Mental Health and Wraparound Milwaukee staff will run a report in Synthesis once the Agency completes documentation in Synthesis. Staff will confirm that the newly assigned Care Coordinator request is an active Care Coordinator. All youth must be assigned to an active and eligible Care Coordinator.

2. The new Care Coordinator is responsible to facilitate a Plan of Care Meeting within **30 days** of the transfer. The Plan of Care and Crisis Plan are to be updated at this meeting.
3. Children's Community Mental Health Services and Wraparound Milwaukee strongly encourages that with either type of transfer, the new and existing Care Coordinators collaborate throughout the transfer process. This collaboration may include, but is not limited to, the new and existing Care

Coordinators attending the next Child & Family Team Meeting if appropriate.

C. Change in Care Coordinator's Status or Information

1. In the event of a change in the Care Coordinator's status or information, the Supervisor is to notify Children's Community Mental Health Services and Wraparound Milwaukee by contacting the Synthesis Help Desk if change in name, number, email, etc.
2. If a change in employment status, the Agency shall follow Policy 035- Provide Add/Drop. If the change in status is short-term (for example, out on medical leave), the Supervisor shall notify the Program Manager.
3. If the change in status is due to a leave of absence longer than 2 weeks or a resignation, the above procedure for a transfer to a new care coordinator must be followed.

Reminder: Follow expectations outlined in *Policy #001- Care Coordination Supervisor Responsibilities* in regards to coverage if a Care Coordinator status has changed.

Attachments

1: [Transfer Notification Letter](#)

Approval Signatures

Step Description	Approver	Date
	Michael Lappen: BHD Administrator	7/6/2021
	Brian McBride: ExDir2 – Program Administrator	7/6/2021
	Dana James: Integrated Services Manager- Quality Assurance	6/28/2021
	Dana James: Integrated Services Manager- Quality Assurance	6/28/2021

Agency Letterhead

(Date letter written)

(Name of family or team member)
(Mailing address)

RE: *(Name of enrolled youth)*

DOB: *(Date of birth)*

Enrolled: *(Date)*

Dear Ms./Mr. *(Name)*:

The purpose of this letter is to inform you that *(Name of old Care Coordinator)* will no longer be your assigned Wraparound Milwaukee Care Coordinator. We hope that this will not cause any significant inconvenience for you. Your new and former Care Coordinators will work together to make the change a smooth transition for you.

Effective *(Date)*, your new Care Coordinator will be *(Name of new Care Coordinator)* at *(Care Coordinator's Agency)*. Your new Care Coordinator may be reached at *(Phone number)* or by cell phone at *(Cell number)*. Your Care Coordinator's Supervisor is *(Name of Supervisor)*, who can be reached at *(Supervisor's phone number)*.

The individuals directly involved with *(Youth's name)* have also received a letter notifying them of this change. We hope that you will be pleased with your newly assigned Care Coordinator.

Sincerely,

(Signature of Sender)

cc: All team members