

# ATTACHMENT F TRANSITION PLAN

# PARTICIPANT INFORMATION

LAST NAME, FIRST NAME		DATE OF BIRTH		
	EMAIL			
MFP APPROVAL DATE		DATE TRANSITION PLAN STARTED		
VIDUAL THAT MAY BE PE	RTINENT			
,		EMAIL		

### SME CONTRACTOR INFORMATION

CONTRACTOR NAME	TRANSITION COORDINATOR NAME
TRANSITION COORDINATOR PHONE	TRANSITION COORDINATOR EMAIL
MFP REGIONAL COORDINATOR	REGION
ADDITIONAL COMMENTS REGARDING THE SME CONTRACTOR THAT MA	AY BE PERTINENT

#### NURSING HOME INFORMATION

FACILITY F	HONE	DATE OF ADMISSION
		COUNTY
CONTACT PERSON PHONE	CONTACT	PERSON EMAIL
SING HOME THAT MAY BE PERTINEN	IT	
	CONTACT PERSON PHONE	FACILITY PHONE         CONTACT PERSON PHONE       CONTACT         SING HOME THAT MAY BE PERTINENT

### COMMUNITY HOME ADDRESS

COMPLETE AFTER CHOICE OF COMMUNITY HOUSING HAS BEEN DETERMINED		
ADDRESS	COUNTY	PHONE

## PERMISSION STATEMENT

I affirm I have met with the Transition Coordinator lis	sted below and I have given my permission to my			
Transition Coordinator and their employing organization to assist me with transitioning from the above				
facility. We will develop a plan that shows my suppo	orts and goals to live in the community. I			
understand that changes can be made, and this Pla	n serves as a guide to help me with my transition. I			
also understand the Transition Coordinator and/or the	heir employing organization is to provide me with			
information, supports, and resources that will help n	ne make a successful transition to the community.			
TRANSITION COORDINATOR NAME	TRANSITION ORGANIZATION NAME			
PARTICIPANT SIGNATURE	DATE			

# **CONTRACTOR ACTIONS**

Provide participant with MFP brochures/Pamphlets				
Complete this Transition Plan in its entirety with the Transition Team (participant, nursing home, family, doctor, legal representative, DSDS SME Regional Coordinator)				
Tour housing unit to identify any issues				
Complete the Emergency Plan in its entirety				
Send Transition Plan to the Regional Coordina	ator once comp	lete		
MEDICAL INFORMATION				
Will your doctor continue to see you once you move	e into the comm	unity?	□ Yes	🗌 No
If no, have you identified a doctor in the community who will accept you?			🗌 Yes	🗌 No
• If you have identified a doctor able to accept you once you move into the community, do you have an appointment within 2 weeks of transition?			□ Yes	🗌 No
Will your doctor prescribe a 30-day supply of medication?			🗌 Yes	🗌 No
Have you selected a pharmacy?		🛛 Yes	🗌 No	
Does your pharmacy deliver medications to your ho	me?	□ No Medications	🗌 Yes	🗌 No
DOCTOR NAME	PHARMACY NAME			
DOCTOR TELEPHONE	PHARMACY TELEPHONE			
DOCTOR ADDRESS PHARMACY ADDRESS				
Has a referral ever been made due to concerns about your health, safety, or well-being?			□ Yes	🗌 No

# MENTAL HEALTH NEEDS

Have you received mental health services or counseling in the past?			🗌 Yes	🗌 No	
Would you like a referral to a mental hea	Ith provider?			□ Yes	🗌 No
Are you taking medication/treatment rec	uiring regular mental health follow-u	up visits	s?	🗌 Yes	🗌 No
Do you have a preference for a mental h	ealth provider	N/	/A	🗌 Yes	🗌 No
IF YES, PROVIDER NAME	PROVIDER ADDRESS	F	PROVID	ER PHONE	
IF YES, DESCRIBE THE MENTAL HEALTH PLAN INCLUDING ELIGIBLE PROGRAMS, RESOURCES, AND SUPERVISION PHYSICIAN:					
Do you have a history or alcoholism or drug abuse?			🗌 Yes	🗌 No	
IF YES, EXPLAIN CIRCUMSTANCES					
IF YES, EXPLAIN THE SUBSTANCE ABUSE PROGRAM INCLUDING COUNSELING/TREATMENT DATE AND TIMES					

# PERSONAL HEALTH NEEDS (Please attach Plan of Care)

Do you have your physician's appr	roval for nursing home transition?	🗆 Yes 🔲 N
Do you need assistance with bathi	ng?	🗆 Yes 🔲 N
IF YES: Bathing in the bathtub	Bathing in the Bed	ebath
Do you need assistance with dress	sing?	🗆 Yes 🔲 N
IF YES: Lower extremities	Upper extremities	
Do you need assistance with toilet	ing?	🗆 Yes 🔲 N
IF YES: Getting on/off commode	With pads	
Do you need assistance with blade	der care?	🗆 Yes 🔲 N
IF YES: Catheter Urinal	Other	
Do you need assistance with bowe	el care?	🗆 Yes 🔲 N
IF YES: Suppositories Laxati	ves Other	· · ·
Do you need assistance with eatin	g?	🗆 Yes 🔲 N
IF YES: Feeding Setup	Cutting Food Clear	n up Meal preparation
Do you need assistance with hous	ekeeping?	🗆 Yes 🔲 N
IF YES: Dusting Moppin	ng 🗌 Vacuuming 🗌 Gene	eral Cleaning Other
Do you need assistance transferrir	ng from one place to another?	🗆 Yes 🔲 N
IF YES: Hoyer Lift Pivot L		
IF YES: ☐ Hoyer Lift ☐ Pivot L PROVIDE THE NAMES OF THREE (3) S	Lift Staff to assist with equi	pment Other
IF YES: Hoyer Lift Pivot L	ift Staff to assist with equi	pment Other
IF YES: ☐ Hoyer Lift ☐ Pivot L PROVIDE THE NAMES OF THREE (3) S	Lift Staff to assist with equi	pment Other
IF YES: Hoyer Lift Pivot L PROVIDE THE NAMES OF THREE (3) S NAME	Lift Staff to assist with equi SUPPORTIVE FAMILY MEMBERS, FRIE PHONE	pment Other
IF YES: Hoyer Lift Pivot L PROVIDE THE NAMES OF THREE (3) S NAME NAME NAME	Lift       Staff to assist with equi         SUPPORTIVE FAMILY MEMBERS, FRIE         PHONE         PHONE         PHONE	pment Other  NDS, OR COMMUNITY ADVOCATES  RELATIONSHIP  RELATIONSHIP  RELATIONSHIP
IF YES: Hoyer Lift Pivot L PROVIDE THE NAMES OF THREE (3) S NAME NAME NAME ASSISTIVE TECHNOLOGY/DEVICE Do you currently use any assistive	Lift       Staff to assist with equi         SUPPORTIVE FAMILY MEMBERS, FRIE         PHONE         PHONE         PHONE	pment Other  NDS, OR COMMUNITY ADVOCATES  RELATIONSHIP  RELATIONSHIP  RELATIONSHIP  MOAT (800) 647-8557*
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### FURNISHINGS

	I	
TRANSPORTATION		
Do you need assistance setting up your new home?	🗌 Yes	🗌 No
Do you need assistance moving?	🗌 Yes	🗌 No
Have you coordinated your move?	🗌 Yes	🗌 No
Are you aware of places which may donate furnishings?	🗌 Yes	🗌 No
Do you have money to buy additional wants and needs?	🗌 Yes	🗌 No
Have you completed the attached transition checklist detailing what possessions you have and what possessions you will need to purchase before transition takes place?	🗆 Yes	🗌 No

Are you able to take care of your transportation needs?	🗌 Yes	🗌 No
Do you need specialized transportation?	🗌 Yes	🗌 No
Do you know how to schedule appointments to use specialized transportation?	🗌 Yes	🗌 No

### MEAL PLANNING

Do you need independent living skills training in this area?		🗌 Yes	🗌 No
Have you coordinated a plan so you can purchase, cook, and eat meals?		🗌 Yes	🗌 No
Do you have a special or complex diet regimen you must follow?		🗌 Yes	🗌 No
Who will do the initial shopping for groceries and supplies?	NAME/RELATIONSHIP		

### SOCIAL AND LEISURE ACTIVITIES

Are you able to familiarize yourself with your new neighborhood?	🗌 Yes	🗌 No
Do you need assistance in meeting your new landlord and neighbors?	🗌 Yes	🗌 No
Do you need assistance in planning daily or weekly social activities?	🗌 Yes	🗌 No
Do you want skills training to assist you with any of these activities	🗌 Yes	🗌 No
What activities do you plan on doing to keep yourself busy once you return home?		

# EMPLOYMENT/VOLUNTEERING

Are you interested in joining or re-joining the workforce?	🗌 Yes	🗌 No
IF YES, DESCRIBE		
		<u> </u>
Is there any history that would prevent you from a particular job or volunteering?	∐ Yes	🗌 No
Would you like to learn a new trade or go back to school?	🗌 Yes	🗌 No
Would you like to volunteer somewhere?	🗌 Yes	🗌 No
Would you like to meet with a Benefits Specialist?	🗌 Yes	🗌 No
Has a referral been made to Missouri Division of Vocational Rehabilitation?	🗌 Yes	🗌 No
Would you like to contact Missouri Division of Vocational Rehabilitation?	🗌 Yes	🗌 No

## GENERAL NEEDS PLAN ACKNOWLEDGEMENT

I hereby affirm I have completed the General Needs Transition Plan with my Transition Coordinator on the following date:

Participant Signature

Transition Coordinator Signature

# **BUDGETING AND FINANCE**

	Review the following questions with the participant and document their response as well as any						
concerns or other it							
INCOME TYPE(S) – BANK A	CCOUNTS, ASS	SETS, SS/SSI/S	SDI, FAMILY MEMB	ERS, PENSIONS, AND EMI	PLOYMENT		
Are there benefits y	ou need as	ssistance	applying for?			🗌 Yes	□No
IF YES, DESCRIBE							
Who currently mana	ages your t	inances?		Guardian	Power of At	-	<b>1</b>
			□Payee		Durable Po		
If you manage your	own financ	ces, do yo	u use a budge	et?		∐ Yes	∐No
Does the nursing he	ome receiv	e your inc	ome checks a	and give you an all	owance?	🗌 Yes	🗆 No
Do you receive you	r check an	d pay the	nursing home	yourself?		🗌 Yes	🗆 No
FUNDING RESOUR	CES						
Due date for							
Medicaid Review							
Person who							
assists you with							
Medicaid Reviews						· · · · · ·	
Is your Medicaid transferable to another Medicaid program?				□Yes	□No		
			□No				
IF YES, LIST THE NAME AND	) PHONE NUME	BER OF THE PE	ERSON ASSISTING	WITH THE TRANSFER			
Did you have a Spe	nddown pr	rior to ente	ering the nursi	ng home?		□Yes	□No
IF YES AMOUNT				□No			
Was spenddown discussed with you during your options counseling session?				□ No			
Do you need assistance with spenddown paperwork?					🗆 No		
Were you or your sp	Were you or your spouse a Veteran in the United States Armed Forces?				□No		
Have you started transferring your SSI/SSDI from the nursing home to the community?							
IF YES, WHEN WAS THE PRO	OCESS STARTE	ED:					
INCOME WORKSHE	ET						
INCOME SOURCE		MONTHL	Y AMOUNT	COMMENT			
SSI		\$					
SSDI		\$					
201		¢					

SSDI	<b>Þ</b>	
SSA	\$	
Railroad Retirement	\$	
Pension	\$	
Employment	\$	
Other	\$	
Other	\$	
TOTAL MONTHLY INCOME	\$	

#### EXPENSE WORKSHEET

INCOME SOURCE	MONTHLY AMOUNT	COMMENT
Rent/Mortgage	\$	
Homeowner/Renter Insurance	\$	
Property Taxes	\$	
Home Repairs/Maintenance/Dues	\$	
Home Improvements	\$	
Electric	\$	
Water/Sewer	\$	
Natural Gas	\$	
Propane	\$	
Telephone – Landline	\$	
Telephone – Cell Phone	\$	
Groceries	\$	
Restaurant Meals	\$	
Cleaning Supplies	\$	
Laundry Supplies	\$	
Personal Care Supplies	\$	
Clothing	\$	
Child Care	\$	
Alimony	\$	
Child Support	\$	
Medical Insurance/Spenddown	\$	
Medical Co-Pays	\$	
Medical Supplies	\$	
Fitness	\$	
Car Payment	\$	
Auto Insurance	\$	
Auto Fuel	\$	
Auto Repairs/Maintenance/Fees	\$	
Personal Property Taxes	\$	
Taxis and Other Transportation	\$	
Credit Cards	\$	
Student Loans	\$	
Other Loans	\$	
Cable/Satellite TV	\$	
Internet	\$	
Hobbies	\$	
Subscriptions/Dues	\$	
Vacations	\$	
Pet Food/Grooming/Vet Care	\$	
Other	\$	
Other	\$	
TOTAL MONTHLY EXPENSES	\$	
TOTAL MONTHLY INCOME	LESS TOTAL	MONTHLY EXPENSES \$

# FINANCE AND BUDGET PLAN ACKNOWLEDGEMENT

I hereby affirm I have completed the Finance and Budget Transition Plan with my Transition Coordinator on the following date: Participant Signature

Transition Coordinator Signature

### HOUSING

Review the following questions with the participant and document their response as well as any concerns or other items on otherwise listed.						
WHERE ARE YOU PLANNING TO LIVE/MOVE?						
Have you obtained a	Have you obtained a housing life from the Transition staff? $\Box$ Yes $\Box$ No					
What is the realistic	TARGET move date? (at least 3	3 months is recomme	nded)			
What city would you	I like to live in?					
0	able, are you interested in living	in another city?		Yes No		
IF YES, WHERE?						
Are you receiving ar	ny help with paying for your hou	sing?		Yes No		
Review housing opti	ions with the participant. Please	indicate their first and	d second choi	ces.		
FII	RST CHOICE	SEC	COND CHOIC	E		
Home/Apartment		Home/Apartment				
Address		Address				
Contact		Contact				
Housing Phone		Housing Phone				
Rent	\$	Rent	\$			
Avg. Utilities	\$	Avg. Utilities	\$			
Deposit Amount	\$					
Is it Accessible	Yes No	□ No				
Pet Allowed	□ Yes □ No □ N/A Pet Allowed □ Yes □			□No □N/A		
Pet Cost	\$D N/APet Cost\$			🗆 N/A		
Waiting List	☐ Yes ☐ No Waiting List ☐ Yes		No			
Length of Wait	Length of Wait					
Are you on Waitlist				□ No		
LIVING ARRANGEMENTS						
IF ALONE, WHO WOULD YO	U CALL IF YOU NEEDED ASSISTANCE?					
Name:	Phone:		Relationship:			
Do you have any type of criminal history which could prohibit you from living in some						
housing complexes?						
Do you have past evictions, unpaid rent or poor credit history which might impact you						
living in subsidized housing?						
IF YES, EXPLAIN						
Do you want internet? If yes, pricing: \$						
OTHER CONCERNS/ITEMS OF INTEREST						

#### HOUSING INSPECTION

Upon inspection of the property(s), please indicate any issues or concerns that must be addressed prior to transitioning the participant into this housing.

EXPLAIN

**Property Address** 

#### HOUSING INSPECTION

Date of Lease	Participant Reviewed Lease?		□No
Date Housing Secured	Date to Receive Keys		
Date Rent/Deposit Paid	Scheduled Move Date		
Utilities Hook-Up	Telephone Hook-Up		
Cable/Satellite Hook-Up	Duplicate Keys Made	Yes	□No
Internet Hook-Up	Duplicate Keys Given To		

#### UTILITIES

Have you scheduled an appointment for telephone service to be installed?			□ No
If yes, date service will be turned on			
Have you scheduled an appointment for electricity to be turned on?			□No
If yes, date service will be turned on Do you owe back payments?			□No
Have you scheduled an appointment for gas	□Yes	□No	
If yes, date service will be turned on Do you owe back payments?			□ No
Have you requested the Post Office change your address?			No

#### HOUSING PLAN ACKNOWLEDGEMENT

I hereby affirm I have completed the Housing Transition Plan with my Transition Coordinator on the following date:
Participant Signature
Transition Coordinator Signature

#### 24- HOUR EMERGENCY BACKUP PLAN ACKNOWLEDGEMENT

I hereby affirm I have completed the 24-Hour Emergency Backup Plan with my Transition Coordinator				
on the following date: . A copy of the plan has been provided to me.				
Participant Signature	Transition Coordinator Signature			

### NURSING HOME CONTACT DATES/DISCHARGE NOTES

Document any communication/information regarding the assistance in this transition:

### 24-HOUR EMERGENCY BACKUP

This plan is for the safety and well-being of the participant. It identifies how to respond to and address any lapse in essential services and other circumstances that could have a negative effect on participant health, safety, or welfare. In case of an				
emergency intervention, the contractor has permission to contact local authorities.				
			NOTE	
Do you have a Lifeline?	∐ Yes	L No	NOTE	
Do you have an Emergency Dialer?	∐ Yes	L No		
Do you have support from a provider?	🛛 Yes	🗆 No	PROVIDER NAME	
IF THERE ARE OTHER AGREED UPON RESOURCES INC	CLUDING FORMA	L & INFORMAL S	SUPPORTS, PLEASE DESCRIBE	
PRIMARY 24-HOUR CONTAG	СТ	OTHER EMERGENCY CONTACT		
Contact Name		Contact N	lame	
Address		Address		
Phone		Phone		
OTHER EMERGENCY CONTA	\CT	C	OTHER EMERGENCY CONTACT	
Contact Name		Contact N	lame	
Address		Address		
Phone		Phone		
Do you use any adaptive equipment?	□Yes	□No	IF YES, DESCRIBE	
Do you use oxygen?	□Yes	ΠNο		
Do you use a wheelchair?	□Yes	□No	IF YES     EXTRA BATTERIES?       Manual     Electric     Yes	
Is home owned or rented?			Owned Rented	
LANDLORD NAME		LANDLORD PH	HONE	
Home has smoke detectors?	□Yes	□No	LOCATION	
Home has fire extinguisher?	□Yes	□No	LOCATION	
Flashlights?	Yes	□No	LOCATION	
Travel/Emergency Radio	□Yes	□No	LOCATION	
Emergency Supplies?	Yes	□No	LOCATION	
Community's Warning Signal	Siren	Whistle	☐ Flashing Device ☐ Unknown	
How do you heat your home?	Electric	Gas	Other:	
How do you heat your water?	Electric	Gas	Other:	
What type of stove do you have?	Electric	Gas	Other:	
Microwave?	□Yes	🗌 No		
Pets?	🗖 Dog	□Cat	Bird Other:	
Prescribed Medications & Frequency	ATTACH LIST	FROM PHARMAG		
Treatments	□ Yes	□No	TYPE	
If yes, describe location and frequency				
What is your likelihood of receiving transportation in case of an emergency?		□Very Good □ Good □ Maybe □Unlikely		
Have you received Ready-in-3 Emergency Info?		□Yes	No	