Print Form

NC Division of Medical Assistance
Community Alternatives Program
For Disabled Adults and Choice Option

CAP/DA Transfer Checklist

Responsibilities of Transferring County (A)

_____Telephone/email correspondence to receiving County to coordinate**: Date** ___/___/___

_____ Name of person in receiving County transfer is being coordinated
_____ **Transfer Date:** _____/_____/_____ (proposed)

_____Issues of Health, Safety and Well-being were discussed

_____ Copy of most recent CAP Approval Letter & most recent FL-2 sent to receiving County

_____Copy of signature pages from current Assessment & POC sent to receiving County

_____Three months of case notes & other pertinent information sent to receiving County

_____Transfer beneficiary's record Date: ____/____/____

_____Case management hours available at transfer for receiving County: ____

_____Beneficiary's CNR Month: _____

Case Manager's Signature: _____ Date: _____

Responsibilities of Receiving County (B)

_____Verify slot availability and request a "reserved" slot, if necessary.

_____CAP approval letter & most recent FL-2 received.

_____ Current assessment & POC signature pages received

_____ Three months of case notes & other pertinent information received

_____Review the assessment and Make Revision to POC

_____ Packet sent to Medicaid Unit/DSS including: 1) a copy of the newly revised & approved POC and, 2) a copy of the forwarded Approval Letter (Medicaid Eligibility Worker) & FL-2 sent by the referring county.

_____Participant notified of successful transfer

_____Authorization and Participation Notices sent to the providers

_____ "Medicaid Eligibility and CAP indicator verified" The CAP indicator code remains in EIS during the transfer process. County Code will not change immediately, but will not impact billing.

_____Participant added to Lead Agency CNR Schedule (based on CNR month)

Case Manager's Signature: _____ Date: _____
Special note: If SSI recipient, participant/family instructed to contact SSA
(11/2011, revised 5/9/12; 1/2014)