

FI Transition Questions
July 10, 2019, FI Workgroup Meeting #3

What exactly happens during document transfer to ensure services are not interrupted? Consumers should not have their personal care services disrupted by transitioning. It should be a seamless process of using a time sheet from FI ABC one day to a time sheet from FI XYZ the next.

- 1) Which documents will be transferred (i.e. Consumer Agreement, PA Health Assessment, I-9)?
- 2) How long will they be valid with new FI?
- 3) Will Consumers have to sign a release for information to be sent to new FI?
- 4) Will the PAs need to sign a release for health assessment documents to be transferred?
- 5) Who will be responsible for obtaining this signed release – Consumer or FI?
- 6) Will these transition rights only be valid when an FI closes or decides not to contract? Consumers deserve information and protection if they want to transition at any time – not just when an FI is closing.
- 7) When Consumers transition, what if the paperwork is incorrect/has inaccuracies? Who is responsible? Is the new FI responsible for honoring a Consumer Agreement which might include clauses their own Consumer Agreement does not include?
- 8) What happens if Consumer transitions out of CDPA? Do transition rights still apply if they transition to different level of care?