Dane County Comprehensive Community Services

Transfer of Service Facilitation Summary

CCS Participant Name:________________________________ Date of Transfer Request: _______________________

DOB: _____________________________ Is this the first transfer of this CCS Participant? Yes No

Tranfer Initiated By:

- ☐ CCS Participant/Guardian
- ☐ CCS Service Faciliation Agency
- ☐ Other: ____

Reason For Transfer:

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Status of CCS Paperwork:

- Next Recovery Plan Due: ____
- Most Recent Assessment Update: _______________________________________
- Physician's Prescription Due: ____

Verified DCDHS

_____ Initials

Important Providers/Supports (include contact information):

- Psychiatrist: ____
- Primary Care Provider: ____
- Natural Support/Guardian: ____

Upcoming Appointments (psychiatrist, PCP, therapist, etc.):

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Clinical Recommendations/Important Things to Know:

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Current (pre-transfer) Service Facilitator Contact Information:

Service Facilitator Name: ______________________________

Agency: ______________________________

Phone Number: ______________________________

Email Address: ______________________________

______________________________ ______________________________
CCS Participant/Guardian Signature Date

______________________________ ______________________________
Current Service Facilitator Signature Date

______________________________ ______________________________
Current Mental Health Professional Signature Date

STOP here and send to CCS Intake. Remainder of form to be completed by New SF Agency.

Case Transfer Consultation Between Old and New SF Agency **Date**: ____________________

Notes:

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______________________________ ______________________________
New SF Agency MHP/SD Signature Date

Tasks for new SF Agency to complete upon completion of transfer:

- ☐ Assign Service Facilitator
- ☐ End-date Recovery Plan service authorizations for former SF agency
- ☐ Authorize services for new SF agency (Assessment, Planning, Facilitation)
- ☐ Review Assessment for need to update
- ☐ Review Recovery Plan for need to update