

Topic:	Terminating Case Management Services
Date Issued/Updated:	09/30/2016

Overview

Description: Responsibilities of a Service Coordinator and Personal Agent when an individual enrolled in Case Management is exited from Case Management (CM) services and Developmental Disabilities Services are terminated.

Purpose/Rationale: A Case Management Entity (CME) is required to exit an individual from CM services when (Oregon Administrative Rule 411-415-0030):

- An individual requests to terminate CM Services (orally or in writing)
- An individual is no longer eligible for CM services
- 30 days after an individual either cannot be located or fails to respond to repeated attempts (more than one attempt and more than one type of contact such as call, letter, and preferably, an attempt at an in person visit) by CME staff to complete ISP development or monitoring activity
- When the individual is no longer a resident of the state of Oregon (Per OAR 461-120-0010, there is no minimum amount of time an individual must live in Oregon to be considered a resident; additionally, an individual continues to be a resident of Oregon during a temporary period of absence if they intend to return when the absence is completed)

Applicability: When an individual enrolled in CM services is having their CM Services terminated by a CME due to one of the bullets above, and the CME is terminating all other Developmental Disabilities (DD) services, the CME must provide a Notice of Planned Action that includes all DD services that will be terminated, not only case management. The Notification of Planned Action (NOPA) should be mailed to the individual's last known address.

Procedure(s) that apply:

For all Case Management Entities

If an individual meets the criteria for exit from Case Management due to one of the bullets identified above, a case manager must provide the individual with a NOPA. More information on issuing a NOPA can be found [here](#).

When the individual is exited from all DD services they will need to reapply for DD services if they want to restart services (per OAR 411-320-0080, a new application is not needed if the individual has been closed for less than 12 months). Contact information for the appropriate CDDP (should the individual wish to reapply for services) should be listed on the NOPA. This NOPA will serve as notice to the individual that the CME intends to exit the individual from all Developmental Disabilities Services, and is the only notice required.

If the individual contacts the CME before the effective date of action identified on the NOPA, the individual can request for case management services to remain open, which may include a request to transfer to another CME. CMEs are encouraged to provide contact information so that the individual may make contact and request a change in CM if desired. The CME must rescind the NOPA if the individual requests to continue receiving case management services.

If the individual takes no action in response to the notice, CPAs and POCs, as applicable, must be ended in eXPRS effective the identified Effective Date of Planned Action (identified on the NOPA). This work must be done not later than 30 days from the effective date of the NOPA.

For Brokerages and CIIS Only:

If the individual does not respond to the NOPA before the effective date identified on the NOPA, the Personal Agent or Services Coordinator must forward a copy of the NOPA to the CDDP. It must be accompanied by an explanation that the individual is being exited from Developmental Disabilities Services. The copy of the NOPA must be sent to the CDDP within 5 business days following the effective date on the NOPA. The CDDP must close the SE48 case management CPA (using the effective date of action identified on the NOPA). This action does not require an additional NOPA be sent to the individual, the NOPA issued by the brokerage/CIIS has already met the requirement to notify the individual.

Form(s) that apply:

[Notification of Planned Action, SDS 0947](#)

Definition(s):

Reference(s):

[OAR 411-340-0110 \(4\)](#)

[OAR Chapter 411, division 318](#)

[OAR 411-415-0030](#)

[OAR 411-300-0120](#)

[NOPA Worker Guide](#)

Frequently Asked Questions:

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