

**List of Suggested Documentation for County to County Transfers**  
(To be sent to the receiving county **when applicable and/or available.**)

1. Personal identification data including a copy of the individual's birth certificate, social security card, Medicaid card;
2. Guardianship, trusteeship or protectorship status. Name, address, phone numbers and e-mail address of the guardian and an indication of the type of guardianship in effect;
3. The name and contact information for any noted personal advocate, including family members of the individual;
4. Assessments, including medical and psychological evaluations and progress reports, therapy evaluations and current treatments, dental records, optometry records;
5. Names and contact information for physicians, medical specialists, dentist, psychologist and other medical professionals providing current treatment;
6. Medical treatment records including current medications;
7. Current ISP's, including any Behavior Support Plans for both the individual's residential and day activity programs;
8. Quality assurance review reports that would be of significance to the 'receiving' county;
9. Relevant incident reports and/or major unusual incident reports;
10. Pertinent case notes, particularly the individual's response to his/her ISP;
11. Personal financial information;
12. Current ODDP assessment and score;
13. Current Adult Acuity Instrument assessment and score;
14. Prior Authorization documentation for any approved or pending requests;
15. Most recent waiver re-determination packet data sent to ODMRDD;
16. C/OEDI, if one was completed to verify eligibility for the county mr/dd board services;
17. Copy of the PAWS that will be in effect up until the time of the transfer;
18. When the individual is not enrolled on a MRDD waiver, the SSA's from the sending and the receiving county boards are to collaborate in determining which county will complete the ODDP assessment that is submitted to the Department;
19. When the individual is not enrolled on an MRDD waiver, the SSA's from the sending and the receiving county boards are to collaborate in determining which county will complete the Adult Acuity Instrument assessment that is submitted to the Department;
20. A copy of the 2399.