

### Transfer meeting

Name of individual:

Name of current Support Coordinator (SC) :

Name of SC being added to the team:

Current SC met with new SC to review case(s) date:

Anticipated transfer date:

Date of ISP end date	
Last Face- to-Face Visit Date	

Done	Task	Comments
	Email sent to planning team to advise of addition of SC on team? <small>Remember, the SC is being added to the team- stay away from saying the "new SC".</small>	
	Planning team updated in PCPT?	
	Current SC- review the roles of the contacts with new sc.	
	Reviewed current: PCPT and NJISP	
	Specific concerns/behaviors for SC to be aware of during visits?	
	Discussion of guardianship, if applicable (guardianship doc in i-record)?	
	Tier reviewed? Discussion if the person has an acuity and what it is for.	
	Current services reviewed?	
	Transferred/assigned to new SC in i-record?	
	For supervisors: transferred to new SC in supervisor spreadsheet?	

Who do you typically contact for MMTs and what is their role?	
Is there a set date/time that you do your MMTs monthly?	
Any time constraints that the family has for MMTs (for example, parents work until 5 every day so calls and visits are done after 5:30, etc.)?	
Individual/guardian preferred method of receiving documents for signature (email, Docusign, through irecord, in-person, mailed)?	
List any pending ISP revisions, services being explored, or unmet needs.	
List any important information that the new SC/SCS needs to know to best support this individual/family.	

Signatures:

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Current support coordinator

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Support coordinator being added to planning team

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Supervisor being added to the planning team

\*AFTER SUPERVISOR SIGNS THIS, PLEASE SAVE THIS IN INDIVIDUAL'S SERVER FOLDER