

SECTION VII. Moderate Needs Group Forms

The following forms may be obtained online at: <http://www.dail.vermont.gov/> or by contacting the Moderate Needs Coordinator at (802) 241-1228.

1. **Moderate Needs Group Application for Services (CFC MOD 900)** Completed by the Case Manager (CM) when an individual is applying for their Moderate Needs service. The CM submits the application to the Moderate Needs Coordinator with the assessment, clinical worksheet, financial worksheet, and complete package checklist. This is to be submitted after funding is verified with potential providers.
2. **Moderate Needs Group - Clinical Eligibility Worksheet (CFC MOD 901)** Completed by the CM when an individual is applying for their Moderate Needs service and at annual reassessment. The CM submits the clinical worksheet to the Moderate Needs Coordinator with the application, assessment, financial worksheet, and complete package checklist.
3. **Moderate Needs Group - Financial Eligibility Worksheet (CFC MOD 902)** Completed by the CM when an individual is applying for their Moderate Needs service and at annual reassessment. The CM submits the financial worksheet to the Moderate Needs Coordinator with the application, assessment and clinical worksheet.
4. **Moderate Needs Group Wait List (CFC MOD 903)** Completed by the Home Health Agency and Adult Day (HHA/AD) when an individual is applying for their Moderate Needs service and funding or capacity is not available. HHA/AD submits to Moderate Needs Coordinator by the 5th of each month.
5. **Moderate Needs Group Service Authorization (CFC MOD 904)** Completed by Moderate Needs Coordinator when an applicant is determined eligible for Moderate Needs services or for continued Moderate Needs services. Moderate Needs Coordinator send copies to applicant, DCF, CM, and Moderate Needs providers.
6. **Denial/Termination Notice from DAIL** Completed by DAIL regional staff when denying or terminating Moderate Needs Group eligibility. DAIL regional staff submits notice to individual, Moderate Needs providers and DCF (when applicable).
7. **Moderate Needs Group Withdrawal/Termination Form (CFC MOD 905)** Completed by CM when an individual withdraws or terminates from the Moderate Needs Group. CM submits copy to Moderate Needs Coordinator and other Moderate Needs providers. Moderate Needs Coordinator will forward copy to DCF (when applicable).
8. **Moderate Needs Group Annual Reassessment (CFC MOD 906A)** Completed by CM when an individual's current authorization expires. It should be submitted to DAIL so that it is received at least 15 days prior to expiration of current authorization.
9. **Moderate Needs Group Change Form (CFC MOD 906B)** Completed by CM when a client has a significant change (change of address or change of services). It will be completed by CM and submitted to Moderate Needs Coordinator for approval. The Moderate Needs Coordinator will forward copies to all providers affected by the change.
10. **Moderate Needs Group Complete Package Checklist (CFC MOD 907)** Completed by CM and included with new applications and reassessments.
11. **Independent Living Assessment (ILA) Intake form** - Completed by the case manager as part of the initial assessment and reassessment process in the home-based setting. The ILA leads to the creation of a Service Plan for the individual. It is submitted with the Service Plan to the DAIL regional office.
12. **Permission to Release Information** – Used to obtain permission to release information each time an assessment is completed. Must be renewed at least once a year