

AE-209

Referral Checklist

A one-page working checklist for discharge planners and case managers.

Use this as a working list. Nothing here needs to be complete before you call us — start the conversation early and fill the gaps as you go.

Before you call

- ☐ Confirm the individual is an adult (18+) and open to a residential home setting
- ☐ Review Admission Criteria for likely fit
- ☐ Identify the anticipated discharge or move date
- ☐ Identify the funding source
- ☐ Identify the guardian or legal decision-maker, if any

Initial contact

- ☐ Call (781) 309-8976 or email myaeternumcare@gmail.com
- ☐ Describe the individual, the timeline, and the funding source
- ☐ Ask about current bed availability
- ☐ Confirm who at Aeternum will be your point of contact

Documents to send

- ☐ Completed referral form
- ☐ Signed release of information covering Aeternum and all involved providers
- ☐ Current medication list with prescriber and pharmacy
- ☐ Recent history and physical
- ☐ Psychiatric evaluation or most recent behavioral health assessment

- ☐ Discharge summary from the current setting
- ☐ Functional or daily living assessment
- ☐ Safety information, including anything relevant to housemate safety
- ☐ Guardianship, conservatorship, or court documents
- ☐ Advance directive or declaration for mental health treatment
- ☐ Insurance, OHP, or CCO card copy and any prior authorization

Assessment and tour

- ☐ Assessment scheduled with the individual
- ☐ Family or guardian invited, with consent
- ☐ Current providers available for a coordination call
- ☐ Tour of the home scheduled
- ☐ Individual's own questions gathered ahead of the visit

Before move-in

- ☐ Fit determination received in writing
- ☐ Funding authorization confirmed
- ☐ Service agreement signed
- ☐ Medications transferred to the home's pharmacy or arranged for delivery
- ☐ Move-in date and arrival time confirmed
- ☐ Belongings packed per the What to Pack guide
- ☐ First-week appointments identified and scheduled
- ☐ Warm handoff call between you and the Aeternum team completed

After move-in

- ☐ Provide any records that arrived after admission