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Introduction Effective November 1, 2012, the ability to share a customer with another organization became available within KAMIS. The previous process of referring a customer has been changed to transferring a customer.

Purpose of Sharing:

Periodically, a customer will receive services in more than one organization area. Most commonly, it will be a congregate meal service. In the past, the customer had to be referred (now transferred) back and forth between the different organizations and additional assessments completed. Now, with the sharing option, one assessment can be used (the one done by the primary organization) with the additional service(s) added to the Plan of Care by all shared organizations.

Another example is a customer that is on the I/DD waiver and whose primary services are provided by a CDDO. If the customer needs to have congregate meals added to their services, the ADRC providing those services can request a share from the CDDO. This allows the CDDO to retain primary access to the customer for I/DD services, while allowing the ADRC access to add other services.

Purpose of Transferring:

When a customer moves out of one organization area and into another organization's area, the customer may be transferred to the new primary organization. Due to security, the primary organization will be the only organization that will be able to access any forms for that customer, unless the customer has been shared.

When a customer ages out of a waiver, and becomes eligible under a different waiver, this may result in a different organization providing these primary services. A Transfer would be appropriate in this situation.

Process <u>Customer Shared:</u>

The customer share can be requested in the following way:

- 1. Share can be requested by another organization to the primary organization.
 - Primary organization accepts the request (offers) the share.
 - Secondary organization will accept the share.

Customer Transferred:

The customer transfer can be requested two different ways:

- 1. Transfer can be requested by another organization to the primary organization.
 - Primary organization accepts the request (offers) the transfer.
 - Secondary organization will accept the transfer.
- 2. Transfer can be offered from the primary organization to another organization.
 - Secondary organization will accept the transfer offer.

Any shares that were granted by the original organization will be to the requesting organization will be canceled upon the acceptance of the Transfer.

After a transfer has been accepted by an organization the customer's primary organization is changed.

Managed Care
Organizations
(MCO)The customer will automatically be shared with an MCO upon the receipt of
a nightly electronic file from the Medicaid Contractor (currently HP). This
will serve two purposes:

- As an indicator of what MCO the customer selected for their Medicaid case management.
- Allow the MCO's case manager assess to the customers records in a read only status.

Requesting a Share

Introduction The purpose of Sharing a customer is to allow a secondary organization access to the customer to add services that the primary organization does not provide.

Example 1: A CDDO is the primary organization for a customer on the I/DD waiver. An ADRC is the secondary (shared) organization for the customer so they can provide congregate meal services.

Example 2: A customer on the FE waiver has an assessment done by the ADRC whose region they reside in. The customer has a meal at a congregate meal site in a different ADRC region. That ADRC requests a share in order to add the congregate meal service for the customer.

How To Request Follow the steps in the table below to request a Share. **a Share**

Step	Action	Result
1.	Complete the Person Search.	Customer is displayed.
2.	Click on the View Forms icon in	List of all forms associated with
	the Search Results.	the customer displays.

F	Forms List Create New Form									
		Form Type		Form Date	Form Status	Organization	Unmet Needs	Plan of Care aaa		
	FUNC	TIONAL ASSESSMENT INSTRUMENT		10/30/2012	APPROVED	3		create CTRL		
	ADRO	OPTIONS COUNSELING		10/19/2012	APPROVED	3		create CTRL		
								Back		
R	leques Comme	t that Organization 3 Grant a Shai nt	e		Reque	est Share				
R	leques Comme	it that Organization 3 Grant a Tran nt	sfer		Reque	est Transfer				
	3.	Enter a Comment to	exp	Option	Optional, but recommended					
	why you are requesting the									
		Share								

Requesting a Share, Continued

How To Request continued a Share

Step	tep Action					Result					
4	•	Click on the Request	Sh	are	The pe	ending sh	are w	vill display	y in		
		button.			the fo	rms list.					
Fo	orms	List					(Create New Forn			
		Form Type		Form Date	Form Status	Organization	Unmet Needs	Plan of Care aaa			
S	SHAR Req	E - from 3 To 4 st 11/04/2012		11/04/2012	REQUESTED	3					
E	UNC	TIONAL ASSESSMENT INSTRUMENT	÷	10/30/2012	APPROVED	3		create CTRL			
E		OPTIONS COUNSELING		10/19/2012	APPROVED	3		create CTRL			
Request that Organization 3 Grant a Transfer											
Comment											
ote	: 5	ince vour organizatio	n h	as requ	ested a s	hare, that	opti	on is no			
nge	r a	wailable					- 10 01				

Requesting a Transfer

Introduction When a customer moves out of one organization area and into another organization's area, the customer may be transferred to the new primary organization.

- 1. Transfer can be requested by another organization to the primary organization.
 - Primary organization accepts the request (offers) the transfer.
 - Organization that the transfer is offered to will accept the transfer.
- 2. Transfer can be offered from the primary organization to another organization.
 - The other organization will accept the transfer offer.

Any shares that were granted by the original organization will be canceled.

Important Note After a referral has been accepted by an organization, the customers' primary organization is changed. Due to security, the primary organization will be the only organization that will be able to access any forms for that customer.

Therefore, any services line items on the Plan of Care will need to be adjusted as needed (i.e. changing end dates) prior to the transfer being processed. If this is not done, the services for the customer will continue to display on the Service Provided listings and reports of the transferring organization.

Requesting a Transfer, Continued

How To Request Follow the steps in the table below to request a Transfer. a Transfer

	Action	Result									
1.	Complete the Person	n Se	arc	h.	Customer is displayed.						
2.	Click on the View Fo	rms	icc	on.	List c	of all for	ms a	sso	ciated	to the	
					custo	omer di	splay	s.			
Pers	son Forms 30										
(Operate New Farm)											
Forms List											
	Form Type	F	orm	Date For	m Status	Organizatio	n Need	et ds (Plan of Care aaa		
FUN	ICTIONAL ASSESSMENT INSTRUMENT	1	0/01/2	2012 APP	ROVED	2		AP	PP (1) CTRL	-	
UNI	FORM ASSESSMENT INSTRUMENT	÷	9/25/	2012 APP	ROVED	2	<u>UMN</u>	<u>I</u> IN	<u>C CTRL</u>	÷	
MFP	WORKSHEET	0	9/20/2	2012 APP	ROVED	2		IN	<u>C CTRL</u>	·	
Comm	nent				Reque	est Transfer					
Comm 3. 4.	Enter any Comment Click on the Request	s t Tra	inst	fer	Reque Optio	onal, bu	t rec	omi sfer	mende r will d	ed isplay	
Comm 3. 4.	Enter any Comment Click on the Request button.	s t Tra	insf	fer	Reque Optio The p in the	onal, bu pending e forms	t rec tran list.	omi sfer	mende r will d	ed isplay	
Comm 3. 4.	Enter any Comment Click on the Request button.	s t Tra	nst	fer	Optio The p in the	onal, bu pending e forms	t rec tran list.	omı sfer	mende r will d	ed isplay	
Comm 3. 4.	Enter any Comment Click on the Request button.	s t Tra	inst	fer	Optio The p in the	onal, bu pending e forms	t rec tran list.	omi sfer	mende r will d	ed isplay Form	
Comm 3. 4.	Enter any Comments Click on the Request button.	s t Tra	inst	Fer Form Date	Reque Optio The p in the	onal, bu pending e forms	t rec tran list.	omi sfer (Unme Needs	mende r will d Create New t Plan of	ed isplay Form	
3. 4. Forms	Enter any Comments Click on the Request button.	s t Tra	insf	Fer Form Date	Reque Optio The p in the e Form S 2 REQUE	onal, bu oending e forms	t rec tran list.	omi sfer (Unme Needs	mende r will d Create New t Plan of s Care aa	ed isplay Form	
3. 4. Forms	Enter any Comments Click on the Request button. s List Form Type ISFER-from 3 To 5 st 11/04/2012 EE-from 3 To 4	s t Tra	inst	Fer Form Dat 11/04/2012 11/04/2012	Reque Optio The p in the e Form S 2 REQUE 2 ACCEPT	onal, bu pending e forms Status Organ STED	t rec tran list.	omi sfer ((mende r will d Create New t Plan ols Care aa	ed isplay	
Comm 3. 4. Forms TRAN Req SHAF Req EUNC	Enter any Comments Click on the Request button. s List SFER - from 3 To 5 st 11/04/2012 st 11/04/2012 - Accept 11/0 CTIONAL ASSESSMENT INSTRUMENT	s t Tra	inst	Form Dat 11/04/2012 10/30/2012	Reque Optio The p in the 2 REQUE 2 ACCEPT 2 APPROV	status Status TED VED	t reconstruction translation list.	omi sfer (Unme	mende r will d Create New t Plan of s Care aa	ed isplay	
Comm 3. 4. Forms TRAN Req SHAF Req EUNC	Enter any Comments Click on the Request button. List Form Type ISFER - from 3 To 5 st 11/04/2012 RE - from 3 To 4 st 11/04/2012 - Offer 11/04/2012 - Accept 11/0 ZTIONAL ASSESSMENT INSTRUMENT COPTIONS COUNSELING	s : Tra	inst e	Form Datt 11/04/2012 11/04/2012 10/30/2012 10/19/2012	Reque Optio The p in the 2 Reque 2 ACCEPT 2 APPROV 2	status organ Status organ Status organ EED I	t rec tran list.	omi sfer (Unme	mende r will d Create New t Plan of s Care aa Care aa care ac CTI	ed isplay	
3. 4. Forms TRAN Req SHAF Req EUNC	Enter any Comments Click on the Request button. s List SFER - from 3 To 5 st 11/04/2012 - Offer 11/04/2012 - Accpt 11/0 CTIONAL ASSESSMENT INSTRUMENT C OPTIONS COUNSELING	s : Tra	Inst G	Fer Form Dat 11/04/2012 11/04/2012 10/30/2012 10/19/2012	Reque Optio The p in the 2 REQUE 2 ACCEPT 2 APPROV	status Organ Status Organ Status Organ Stee	t reco tran list.	omi sfer (Unme	mende r will d Create New t Plan of care aa care aa care aa care aa	ed isplay	
Comm 3. 4. Forms TRAN Req SHAF Req EUNC ADRC	Enter any Comments Click on the Request button. List SFER - from 3 To 5 st 11/04/2012 E - from 3 To 4 st 11/04/2012 - Offer 11/04/2012 - Accept 11/0 CTIONAL ASSESSMENT INSTRUMENT C OPTIONS COUNSELING St that Organization 3 Grant a Share and	s t Tra	Inst G	Fer Form Date 11/04/2012 10/30/2012 10/19/2012	Reque Coption The p in the coption coptio	status Organ Status Organ Status Organ Status Organ Status Organ	t reconstruction translation list.	omi sfer (Unme Needs	r will d Create New t Plan of care aa care ac care ac cac care ac care ac cac care ac care ac care ac care ac care aca	ed isplay	
3. 4. Forms TRAN Req SHAF Req EUNC ADRC	Enter any Comments Click on the Request button. List Est Est Est Est Est Est Est E	s : Tra	inst e	Form Dat 11/04/2012 11/04/2012 10/19/2012	Reque Optio The p in the 2 REQUE 2 ACCEPT 2 APPROV 2 APPROV	status Organ Status Organ Status Organ VED VED A	t reco tran list.	omi sfer (Unme Needs	mende r will d Create New t Plan of s Care aa create CTI greate CTI greate CTI	ed isplay Form) fa	

Initiating a Transfer (Offered by the Primary Organization)

Introduction If a customer's primary organization knows that the customer is moving to a different area and will no longer be receiving services from them, they can initiate a transfer so the new organization does not need to request the transfer.

How To InitiateFollow the steps in the table below to initiate a transfer to another
organization.

Step	Action				Result					
1.	Complete the Person Se	ear	ch.	Customer is displayed.						
2.	Click on the View Form	s ic	con.	List of	all forms ass	sociated to the				
				custor	mer is display	/ed.				
	· · ·									
FUNCT	IONAL ASSESSMENT INSTRUMENT	.	10/30/2012	APPROVED	3	create CTRL				
ADRC	DPTIONS COUNSELING		10/19/2012	APPROVED	3	create CTRL				
Offer a T	ransfer to Another Organization					Back				
Offer Tran	sfer to Select Organization	mmer	nt			Offer Transfer				
3.	Select the Organization	be	eing	Since	you already a	are the primary				
	offered the transfer.			organization for the customer,						
				your only option is to Offer.						
4.	Enter any Comments			Optional, but recommended						
5.	Click on the Offer Trans	fei	r	The pending transfer will display						
	button.			in the forms list.						
				•						
	Form Type		F	orm Date	Form Status	Organization				
TRANSFER - from 10 to 4 12/17/20 Offer 12/17/2014 12/17/20			2014	OFFERED	10					
UNIFORM PROGRAM REGISTRATION 🖨 12/16/20				2005 APPROVED 10						
Note: S	Since your organization h	as	offere	d the tr	ansfer, that o	option is no				
longer a	available.									

Finishing the Share / Transfer Process

Introduction	Once a share or transfer is requested, the two organizations will need to undergo an offer – accept process to complete the request.
Process	There are three process steps to sharing or transferring a customer when another Organization requests a share or transfer:
	 Initiate with a Request Requested – An organization requests the share/transfer from the primary organization. Offered – The primary organization offers the share/transfer to the requesting organization. Accepted – The requesting organization officially accepts the share/transfer. There are two process steps to sharing or transferring a customer when the
	 primary organization offers a customer to another organization: Initiate with an Offer Offered – The primary organization offers the share/transfer to another organization. Accepted – The organization that the customer was offered to officially accepts the share/transfer.
	Any shares that were granted by the original organization will be rescinded. Continued on next page

Share-Transfer Workload

Share-TransferWhile the first step of a Share/Transfer is done from the customer's FormsWorkloadList, the rest of the process is completed from the Share-Transfer Workload.

The Share-Transfer Workload is accessed from the navigation menu bar. It will always open in a separate window. Anytime your organization has a Share or Transfer that needs attention, the button text will be red.

Share-Transfer Workload Window

Area	Purpose
Select Type filter	Check the box to display the Shares,
	Transfers, or both, that are involved
	in a Share/Transfer request.
Select Status filter	Check the Share/Transfer status
	that you want to display
MCOs filter	Defaults to Ignore so the list that
	displays does not include the
	thousands of Shares that are
	automatically granted via the
	nightly electronic file from the
	Medicaid Contractor (currently HP
	Medicaid.
Get Selected Transactions button	To get the customers that meet the
	criteria of the selected filters
Customer List	The results that meet the previously
	selected filters

Shares and T	ransfers for (CME 02				
Select Type: Share Transfer	Select Status:	QUESTED	ICOs: Include Ignore	Get Selected	I Transactions)
P		Rows 15	5 🔻 Go	- 🔅		
<u>Customer</u> <u>Number</u>	Action Date	<u>Full Name</u>	<u>Түре</u>	<u>Status</u>	From CME	<u>To CME</u>
646449 *	12/17/2014	ETHAN FORAKER	TRANSFER	REQUESTED	2	2936
31344 *	12/17/2014	KENNETH JOHNSON	TRANSFER	REQUESTED	2	8084
						1 - 2 of 2

Share-Transfer Workload – Make Offer

Share-TransferFollow the steps in the table below to Offer a requested Share/Transfer.Workload –(You are the current Primary Organization of the customer.)Make Offer

Action	Result								
Click on the Share-Transfe	The Share-Transfer Workload								
Workload button on the		opens in a separate window.							
navigation menu bar									
		By default, the Requested Shares							
		for the Organization will display.							
Organizations Org. Members MMIS Workload EDR Workload Share-Transfer Workload									
Shares and Transfers for CME 03									
Select Type V SHARE Select Status	REQUEST OFFERED ACCEPTEI RESCINDE REJECTEI DECLINEE CANCELE	STED SD TED DED ED REQUEST ED LED							
(Key) Customer Name Ty	ype Sta	tatus Date From To CME CME							
968 30000585 * FREDA SMURF SH	IARE REQUE	UESTED 11/04/2012 03:37 PM 3 4							
Select either the Share or		Filters the resulting list so the							
Transfer checkbox		Selected Type will display							
The Requested status show	uld be	Filters the resulting list so only							
selected already		will display							
	Action Click on the Share-Transfer Workload button on the navigation menu bar Organizations Org EDR Workload S Shares and Transfers for CME 03 Select Type SHARE TRANSFER Select Status (Key) Customer Number 968 30000585* FREDA SMURF SH Select either the Share or Transfer checkbox The Requested status sho selected already	Action Click on the Share-Transfer Workload button on the navigation menu bar Organizations Org. Membres EDR Workload Shares Shares and Transfers for CME 03 Select Type SHARE TRANSFER Select Status QCustomer Name Q68 30000585* FREDA SMURF SHARE Select either the Share or Transfer checkbox The Requested status should be selected already							

Share-Transfer Workload – Make Offer, Continued

Share-Transfer Continued Workload – Make Offer

Step	Action	Result
4.	Click on the Customer Number	The Share-Transfer History
	link.	region displays on the right side
		of the window.
Shares and T	ransfers for CME 03	Share-Transfer History
	REQUESTED OFFERED	KAMIS # 30000585 Name FREDA SMURF AAA/CME Primary 3 This SHARE is from CME 3 to CMF 4 VAMIS A Status is REQUESTED V
Select Type	SHARE Select Status RESCINDED Get Selected Transactions	Key ISN Type Status By On Comments 11/04/2012 UPR to be
	CANCELED	968 968 SHARE REQUESTED USERNAME 03.37:16 PM added 1 - 1
(Key) Custor Numb	ner Name Type Status Date From To CME CME	Comments
968 .	SMURF SHARE REQUESTED 03:37 PM 1 - 1	
		Make Offer Reject Request
	Pa	Please note that when a Transfer is accepted existing Shares are rescinded and outstanding Shares and Transfers are canceled.
	Click on the appropriate button	Make Offer conduithe process
5.	click off the appropriate button,	back to the requesting
	Transfor or to roject the Share/	/ organization to accort the offer
	Transfer request	Bejoct Request rejects the
	Transfer request	Share/Transfer request and the
		process is complete. The
		customer remains with the
		original Primary organization
6		The Offer (or Rejection) action
0.		will be added to the Share-
		Transfer History table and the
		Forms List page.
7.	Close the Share-Transfer	The window closes and the
	Workload window.	current KAMIS window displays.

Share-Transfer Workload - Accept

Introduction Once a Share or Transfer has been offered to an organization, the final step is to Accept the offer. Once this step is done the Share/Transfer process is complete.

How To AcceptFollow the steps in the table below to accept a Share or Transfer that has
been offered to your organization.Transfer

Step	Action					Result					
1.	Click on the Share-Transfer					The Share-Transfer Workload					
	Workload b	utton on th	е		ope	ns in a separa	te wi	indov	Ν.		
	navigation n	nenu bar									
	Organizations 0	rg. Members Mi	MIS Work	kload	Ву с	lefault, the Re	ques	sted S	Shares		
	Controlation	Siluto-Transit	a trointe		for	the Organizati	on w	ill di	splay.		
[Shares and Tran	sfers for CME	03								
	Select Type SHARE Select Status RESCINDED Get Selected Transactions REJECTED REJUESTED Get Selected Transactions REJECTED REQUEST DECLINED										
	(Key) Customer	Name	Туре	Stat	tus	Date	From CME	To CME			
	968 30000585	* FREDA SMURF	SHARE	REQUE	STED	11/04/2012 03:37 PM	3	4			
2.	Select either the Share or					Filters the resulting list so the					
	Transfer checkbox					ected Type wil	l disp	olay			
3.	Select the Offered status					Filters the resulting list so only			only		
					Offered Shares or Transfers will display						
	•										

Share-Transfer Workload – Accept, Continued

How To Accept Continued a Share or Transfer

Step	Action	Result
4.	Click on the Customer Number	The Share-Transfer History
	link of the customer you are	region displays on the right side
	accepting the Share or Transfer	of the window.
	for.	
		1
Shares and T	ransfers for CME 03 Shar	e-Transfer History
	REQUESTED KAI	IIS # 30000585 Name FREDA SMURF AAA/CME Primary 3
Select Type	SHARE Select Status RESCINDED Get Selected Transactions Key	E4. Status is REQUESTED
L.	REJECTED REQUEST 968	968 SHARE REQUESTED USERNAME 11/04/2012 UPR to be added
(Key) Custo	mer Name Type Status Date From To CME CME Comm	1 - 1
968 30000	FREDA SMURF SHARE REQUESTED 11/04/2012 03:37 PM 3 4	^
	1-1	Hales Offer
	Pleas	e note that when a Transfer is accepted existing Shares are rescinded
	and o	utstanding Shares and Transfers are canceled.
5.	Click on the appropriate button,	Accept Offer – Accepts the
	either to accept the Share/	Transfer of the customer. You
	Transfer, or to reject the Share/	are now the primary
	Transfer offer	organization for the customer.
		Reject Offer – Rejects the
		Share/Transfer offer and the
		process is complete. The
		customer remains with the
		original Primary organization.
6.		The Offer (or Rejection) action
		will be added to the Share-
		Transfer History table and the
		Forms List page.
7.	Close the Share-Transfer	The window closes and the
	Workload window.	current KAMIS window displays.

Rescinding a Customer Share

Introduction If there is a reason to stop a share with an organization, the primary organization can rescind the share.

How To Rescind Follow the steps in the table below to rescind a customer share. **a Share**

tep	Action				Result				
1.									
2.	Click on the	Share-Tr	ansfer		The Share-Transfer Workload]	
	Workload button on the				displa	ays in a sepa	rate windov	v.	
	navigation menu bar.								
3.	Select Share	are for the Select Type			Check appears in selection box				
4.	Select Accepted for the Select				Check appears in selection box			X	
	Status								
<u>sh</u>	elect Type SHAF	RE Select	Status R D Cted	EQUEST FFERED CCEPTEI ESCINDE EJECTEI ECLINEI ANCELEI	ED D D REQUE	ST From f the organiz	To To ation's shar	red	
				CAN	CELED				
(Ke	y) Customer Number	Name	Туре	Sta	tus	Date	From To CME CME		
968	30000585	FREDA SMURF	SHARE	ACCE	PTED	11/04/2012 03:37 PM	3 4		
							1 - 1		

Rescinding a Customer Share, Continued

How To Rescind Continued a Share

6. Click on the Customer Number link of the customer you want to rescind the share for. Share / Tra will display Share-Transfer History KAMIS # 30000585 Name FREDA SMURF AAA/CME Primar This SHARE is from CME 3 to CME 4. Status is RESCINDED • Key ISN Type Status By On 160 160 SHARE REQUESTED - 160 161 SHARE OFFERED - 04/25/2012 02:19:41 PM 04/25/2012	y 3 Comments
Initial of the sourcement you want to provide the share for. Share-Transfer History KAMIS # 30000585 Name FREDA SMURF AAA/CME Primar This SHARE is from CME 3 to CME 4. Key ISN Type Status is RESCINDED • 04/25/2012 160 160 SHARE AAA/CME Primar This SHARE is from CME 3 to CME 4. You of the status o	y 3 Comments
Share-Transfer History KAMIS # 30000585 Name FREDA SMURF AAA/CME Primary This SHARE is from CME 3 to CME 4. Status is RESCINDED Key ISN Type Status By On 160 160 SHARE REQUESTED - 04/25/2012 160 161 SHARE OFFERED - 04/25/2012 160 161 SHARE OFFERED - 04/25/2012	y 3 Comments
Share-Transfer History KAMIS # 30000585 Name FREDA SMURF AAA/CME Primar This SHARE is from CME 3 to CME 4. Key ISN Type Status is RESCINDED 160 160 SHARE REQUESTED 04/25/2012 160 161 SHARE REQUESTED 04/25/2012 160 161 SHARE OFFERED 04/25/2012 02:11:23 PM 04/25/2012 02:21:23 PM	y 3 Comments
KAMIS # 30000585 Name FREDA SMURF AAA/CME Primar This SHARE is from CME 3 to CME 4. Status is RESCINDED Key ISN Type Status By On 160 160 SHARE REQUESTED - 04/25/2012 02:19:41 PM 160 161 SHARE OFFERED - 04/25/2012 02:12:31 PM	y 3 Comments
Key ISN Type Status By On 160 160 SHARE REQUESTED - 04/25/2012 02:19:41 PM 160 161 SHARE OFFERED - 04/25/2012 02:19:21 PM	Comments
160 160 SHARE REQUESTED - 04/25/2012 02:19:41 PM 160 161 SHARE OFFERED - 04/25/2012 02:21:23 PM	
160 161 SHARE OFFERED - 04/25/2012 02:21:23 PM	
160 162 SHARE ACCEPTED - 04/25/2012 02:21:43 PM	
then click on the 'Rescind Share' button.	Create New Form
Forms List	Organization Unmet Plan of
TRANSFER - from 3 To 5 11/04/2012 ACCEPTED	Needs Care aaa
Regst 11/04/2012 - Offer 11/04/2012 - Accpt 11/04/2012 SHARE - from 3 To 4 Devel 44/04/2012 - Accpt 11/04/2012 RESCINDED	3
FUNCTIONAL ASSESSMENT INSTRUMENT III 10/02/012 - RSchild Filoda/2012 - RSchild Filoda/20	3 <u>create CTRL</u>
ADRC OPTIONS COUNSELING 🖶 10/19/2012 APPROVED	3 <u>create CTRL</u>
Comments	Back
Rescind Share	ii.

The Share-Transfer History region and the Forms List will reflect the action taken.

The organization will no longer appear as a Secondary Organization in the Customer Information header, and the organization will no longer have access to the customer.