Chapter 10 – Customer Share and Transfers

Table of Contents

Sharing / Transferring a Customer

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

Customer Shared:

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 a Share

Follow the steps in the table below to request a Share.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>Complete the Person Search.</td><td>Customer is displayed.</td></tr>
<tr><td>2.</td><td>Click on the View Forms icon in the Search Results.</td><td>List of all forms associated with the customer displays.</td></tr>
<tr><td colspan="3">


</td></tr>
<tr><td>3.</td><td>Enter a Comment to explain why you are requesting the Share</td><td>Optional, but recommended</td></tr>
</table>

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Requesting a Share, Continued

How To Request a Share continued

Step	Action	Result
4.	Click on the **Request Share** button.	The pending share will display in the forms list.

Note: Since your organization has requested a share, that option is no longer available.

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.

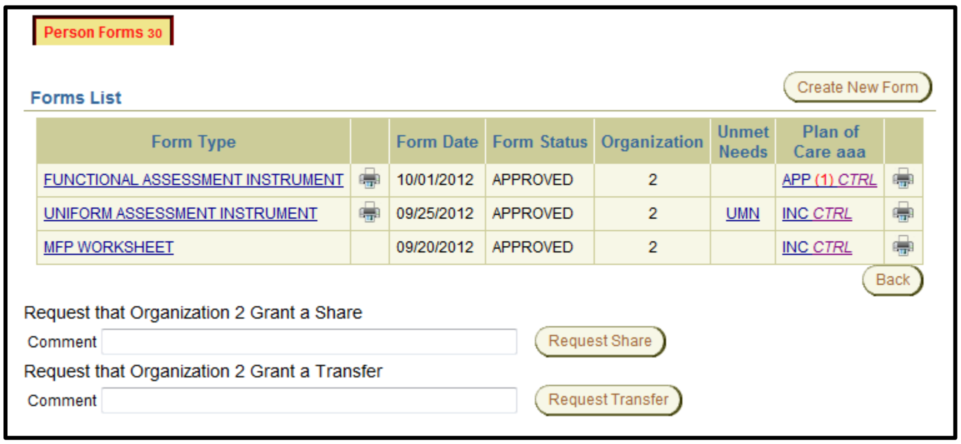
Therefore, any services line items on the Plan of Care will need to be adjusted as needed (i.e. changing end dates) prior to the transfer being processed. If this is not done, the services for the customer will continue to display on the Service Provided listings and reports of the transferring organization.

Requesting a Transfer, Continued

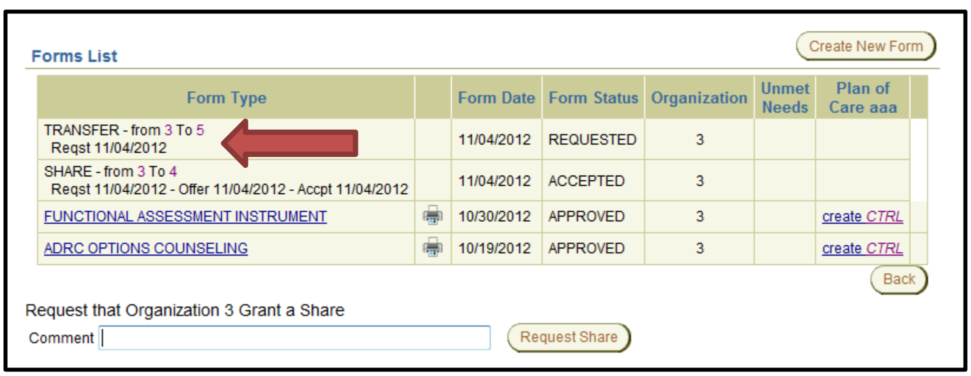
How To Request a Transfer

Follow the steps in the table below to request a Transfer.

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



Step	Action	Result
3.	Enter any **Comments**	Optional, but recommended
4.	Click on the **Request Transfer** button.	The pending transfer will display in the forms list.



Note: Since your organization has requested a transfer, that option is no longer available.

Initiating a Transfer (Offered by the Primary Organization)

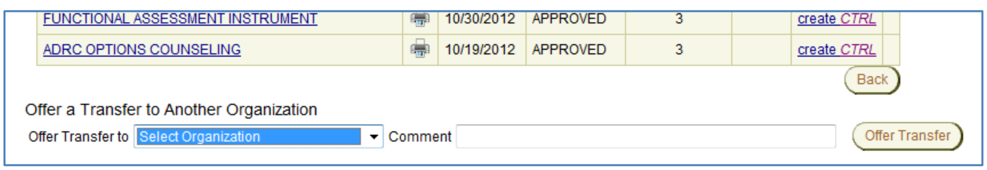
Introduction

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.

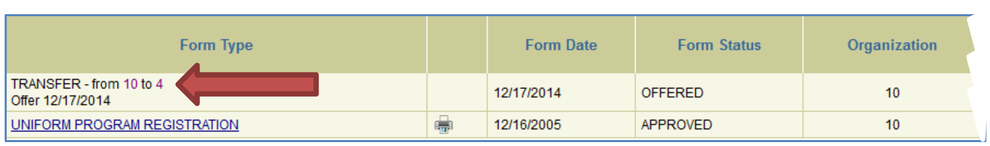
How To Initiate a Transfer

Follow the steps in the table below to initiate a transfer to another organization.

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



Step	Action	Result
3.	Select the **Organization** being offered the transfer.	Since you already are the primary organization for the customer, your only option is to Offer.
4.	Enter any **Comments**	Optional, but recommended
5.	Click on the **Offer Transfer** button.	The pending transfer will display in the forms list.



Note: Since your organization has offered the transfer, that option is no longer 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

1. **Requested** – An organization requests the share/transfer from the primary organization.
2. **Offered** – The primary organization offers the share/transfer to the requesting organization.
3. **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

1. **Offered** – The primary organization offers the share/transfer to another organization.
2. **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.

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Share-Transfer Workload

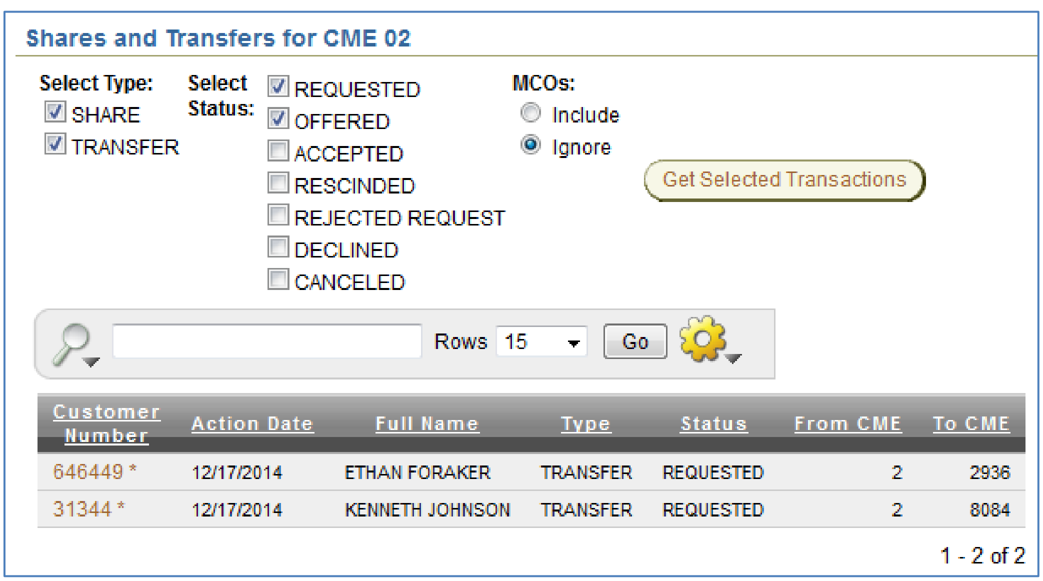
Share-Transfer Workload

While the first step of a Share/Transfer is done from the customer's Forms List, 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

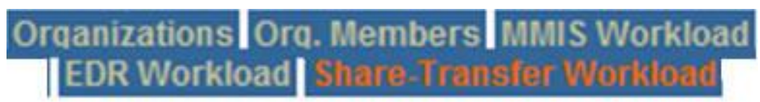


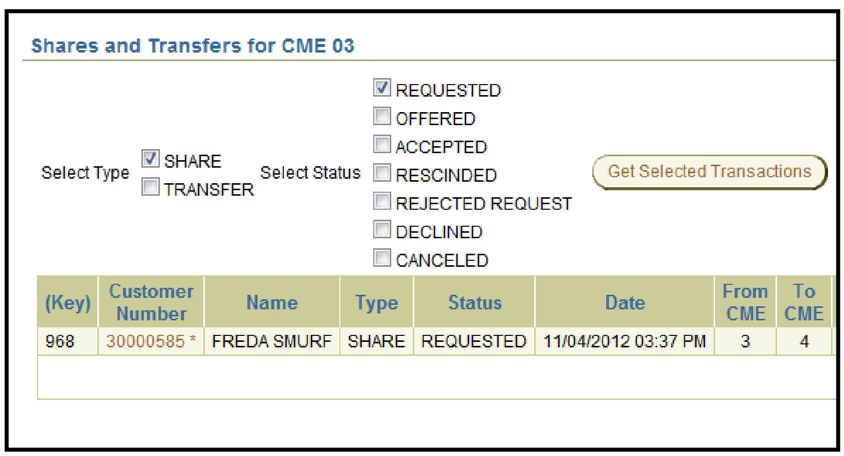
Share-Transfer Workload – Make Offer

Share-Transfer Workload – Make Offer

Follow the steps in the table below to Offer a requested Share/Transfer. (You are the current Primary Organization of the customer.)

Step	Action	Result
1.	Click on the **Share-Transfer Workload** button on the navigation menu bar	The Share-Transfer Workload opens in a separate window. By default, the Requested Shares for the Organization will display.





Step	Action	Result
2.	Select either the **Share** or **Transfer** checkbox	Filters the resulting list so the Selected Type will display
3.	The **Requested** status should be selected already	Filters the resulting list so only Requested Shares or Transfers will display

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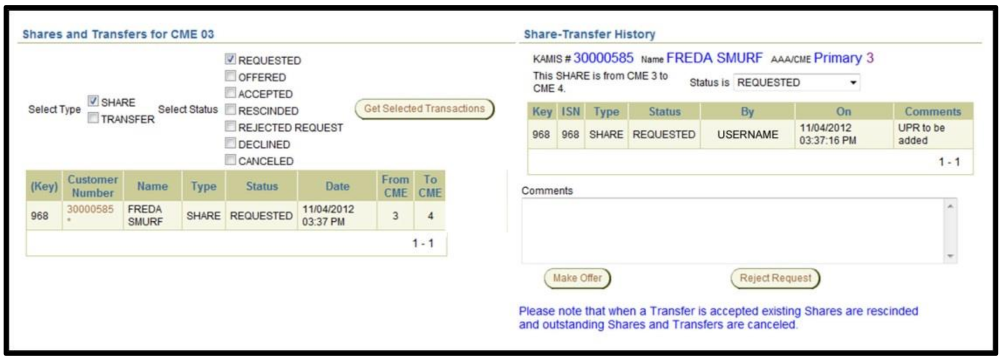
Share-Transfer Workload – Make Offer

Continued

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>4.</td><td>Click on the Customer Number link.</td><td>The Share-Transfer History region displays on the right side of the window.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>5.</td><td>Click on the appropriate button, either to offer the Share/ Transfer, or to reject the Share/ Transfer request</td><td>Make Offer – sends the process back to the requesting organization to accept the offer.
Reject Request – rejects the Share/Transfer request and the process is complete. The customer remains with the original Primary organization.</td></tr>
<tr><td>6.</td><td></td><td>The Offer (or Rejection) action will be added to the Share-Transfer History table and the Forms List page.</td></tr>
<tr><td>7.</td><td>Close the Share-Transfer Workload window.</td><td>The window closes and the current KAMIS window displays.</td></tr>
</table>

Share-Transfer Workload - Accept

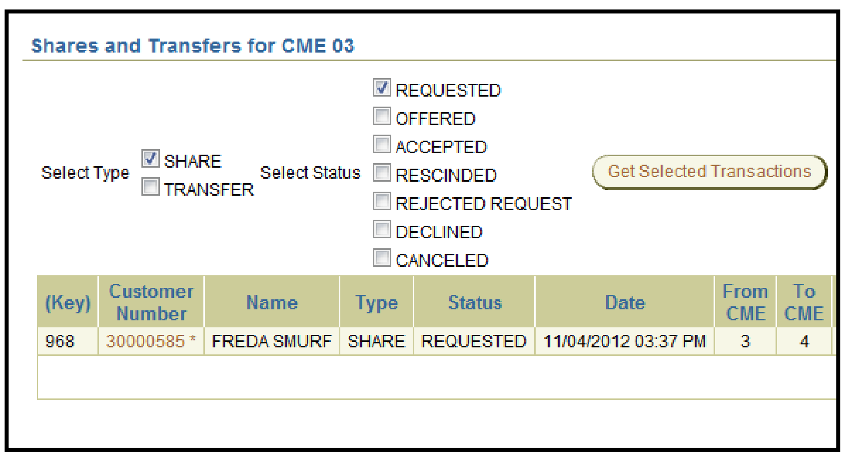
Introduction

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 Accept a Share or Transfer

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

Step	Action	Result
1.	Click on the **Share-Transfer Workload** button on the navigation menu bar 	The Share-Transfer Workload opens in a separate window. By default, the Requested Shares for the Organization will display.



Step	Action	Result
2.	Select either the **Share** or **Transfer** checkbox	Filters the resulting list so the Selected Type will display
3.	Select the **Offered** status	Filters the resulting list so only Offered Shares or Transfers will display

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How To Accept a Share or Transfer

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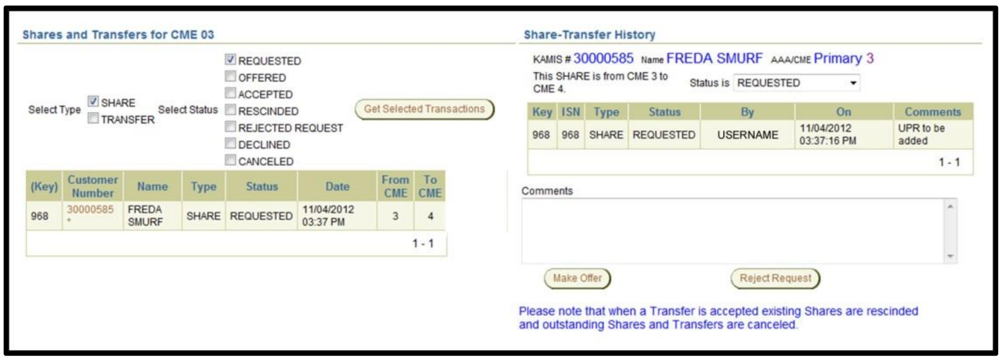
Step	Action	Result
4.	Click on the **Customer Number** link of the customer you are accepting the Share or Transfer for.	The **Share-Transfer History** region displays on the right side of the window.



Step	Action	Result
5.	Click on the appropriate button, either to accept the Share/ Transfer, or to reject the Share/ Transfer offer	**Accept Offer** – Accepts the Transfer of the customer. You are now the primary 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 Workload** window.	The window closes and the current KAMIS window displays.

Rescinding a Customer Share

Introduction

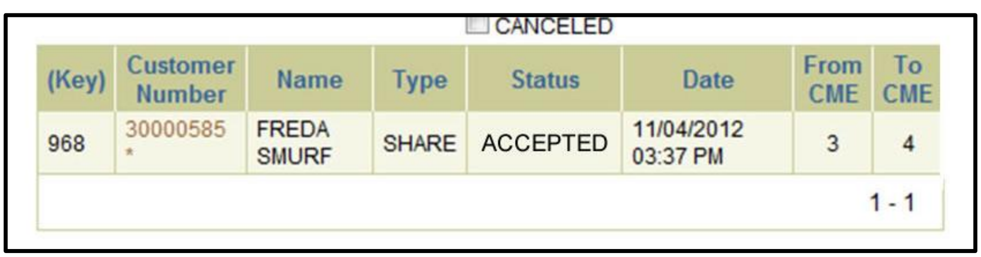
If there is a reason to stop a share with an organization, the primary organization can rescind the share.

How To Rescind a Share

Follow the steps in the table below to rescind a customer share.

Step	Action	Result
1.		
2.	Click on the **Share-Transfer Workload** button on the navigation menu bar.	The Share-Transfer Workload displays in a separate window.
3.	Select **Share** for the Select Type	Check appears in selection box
4.	Select **Accepted** for the Select Status	Check appears in selection box

Step	Action	Result
5.	Click on **the Get Selected Transactions** button.	List of the organization's shared customers will display.



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How To Rescind a Share

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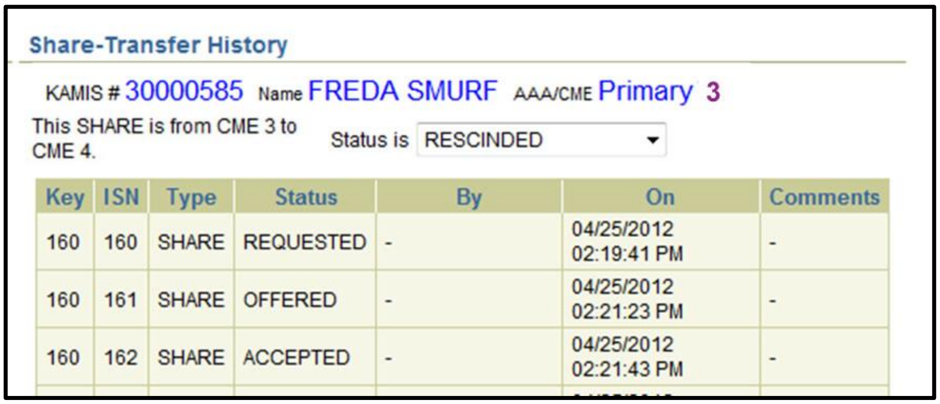
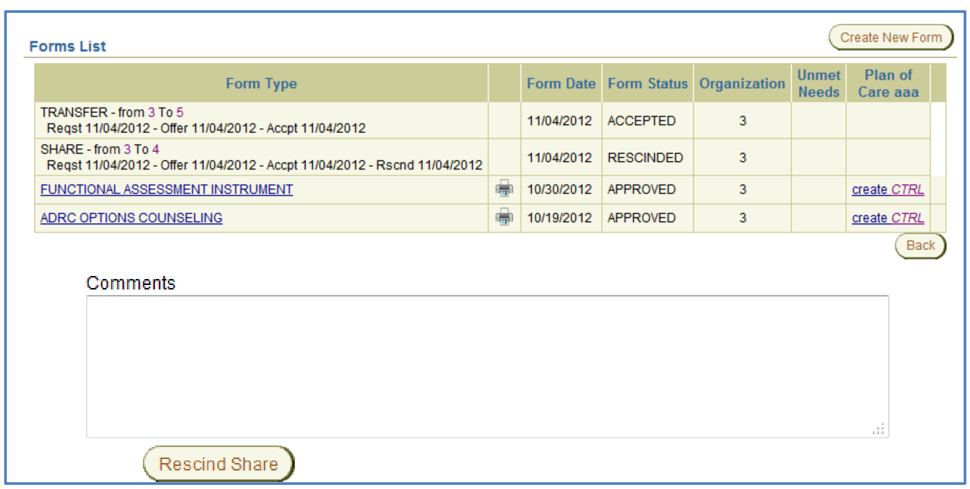
Step	Action	Result
6.	Click on the **Customer Number link** of the customer you want to rescind the share for.	**Share / Transfer History** region will display.



Step	Action	Result
7.	Enter a Comment (optional), then click on the 'Rescind Share' button.	The share will be rescinded.



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.