

Chapter 10 – Customer Share and Transfers

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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.

Sharing / Transferring a Customer, Continued

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.

Step	Action	Result
1.	Complete the Person Search .	Customer is displayed.
2.	Click on the View Forms icon in the Search Results.	List of all forms associated with the customer displays.
		
3.	Enter a Comment to explain why you are requesting the Share	Optional, but recommended

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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.																								
<div style="border: 1px solid black; padding: 10px;"> <p>Forms List Create New Form</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #d9ead3;">Form Type</th> <th style="background-color: #d9ead3;">Form Date</th> <th style="background-color: #d9ead3;">Form Status</th> <th style="background-color: #d9ead3;">Organization</th> <th style="background-color: #d9ead3;">Unmet Needs</th> <th style="background-color: #d9ead3;">Plan of Care</th> </tr> </thead> <tbody> <tr> <td>SHARE - from 3 To 4 Reqst 11/04/2012 </td> <td>11/04/2012</td> <td>REQUESTED</td> <td>3</td> <td></td> <td></td> </tr> <tr> <td>FUNCTIONAL ASSESSMENT INSTRUMENT </td> <td>10/30/2012</td> <td>APPROVED</td> <td>3</td> <td></td> <td>create CTRL</td> </tr> <tr> <td>ADRC OPTIONS COUNSELING </td> <td>10/19/2012</td> <td>APPROVED</td> <td>3</td> <td></td> <td>create CTRL</td> </tr> </tbody> </table> <p style="text-align: right;">Back</p> <p>Request that Organization 3 Grant a Transfer</p> <p>Comment <input type="text"/> Request Transfer</p> </div>			Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care	SHARE - from 3 To 4 Reqst 11/04/2012 	11/04/2012	REQUESTED	3			FUNCTIONAL ASSESSMENT INSTRUMENT 	10/30/2012	APPROVED	3		create CTRL	ADRC OPTIONS COUNSELING 	10/19/2012	APPROVED	3		create CTRL
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ADRC OPTIONS COUNSELING 	10/19/2012	APPROVED	3		create CTRL																					
<p>Note: Since your organization has requested a share, that option is no longer available.</p>																										

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.

Person Forms 30

[Create New Form](#)

Forms List

Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care aaa
FUNCTIONAL ASSESSMENT INSTRUMENT	10/01/2012	APPROVED	2		APP (1) CTRL
UNIFORM ASSESSMENT INSTRUMENT	09/25/2012	APPROVED	2	UMN	INC CTRL
MFP WORKSHEET	09/20/2012	APPROVED	2		INC CTRL

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Request that Organization 2 Grant a Share
 Comment [Request Share](#)

Request that Organization 2 Grant a Transfer
 Comment [Request Transfer](#)

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

Forms List

[Create New Form](#)

Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care aaa
TRANSFER - from 3 To 5 Reqst 11/04/2012	11/04/2012	REQUESTED	3		
SHARE - from 3 To 4 Reqst 11/04/2012 - Offer 11/04/2012 - Accept 11/04/2012	11/04/2012	ACCEPTED	3		
FUNCTIONAL ASSESSMENT INSTRUMENT	10/30/2012	APPROVED	3		create CTRL
ADRC OPTIONS COUNSELING	10/19/2012	APPROVED	3		create CTRL

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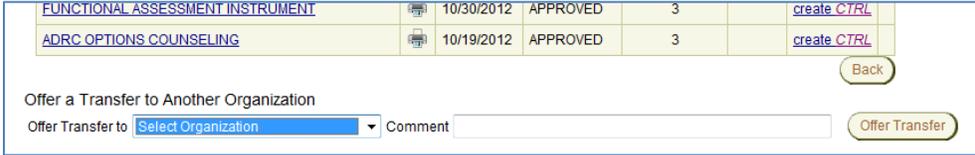
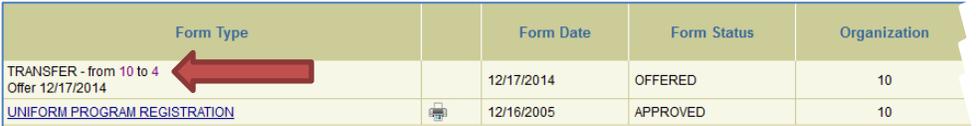
Request that Organization 3 Grant a Share
 Comment [Request Share](#)

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.
 <p>The screenshot shows a table of forms with columns for Form Name, Form Date, Form Status, and Organization. Below the table is a form titled 'Offer a Transfer to Another Organization' with a dropdown menu for 'Offer Transfer to' and a text field for 'Comment'. A red arrow in the screenshot points to the 'Offer Transfer' button.</p>		
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.
 <p>The screenshot shows the updated forms list with a new entry: 'TRANSFER - from 10 to 4 Offer 12/17/2014'. A red arrow points to this entry. The table has columns for Form Type, Form Date, Form Status, and Organization.</p>		
<p>Note: Since your organization has offered the transfer, that option is no longer available.</p>		

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

Shares and Transfers for CME 02

Select Type: SHARE TRANSFER
Select Status: REQUESTED OFFERED ACCEPTED RESCINDED REJECTED REQUEST DECLINED CANCELED

MCOs: Include Ignore

[Get Selected Transactions](#)

Rows 15

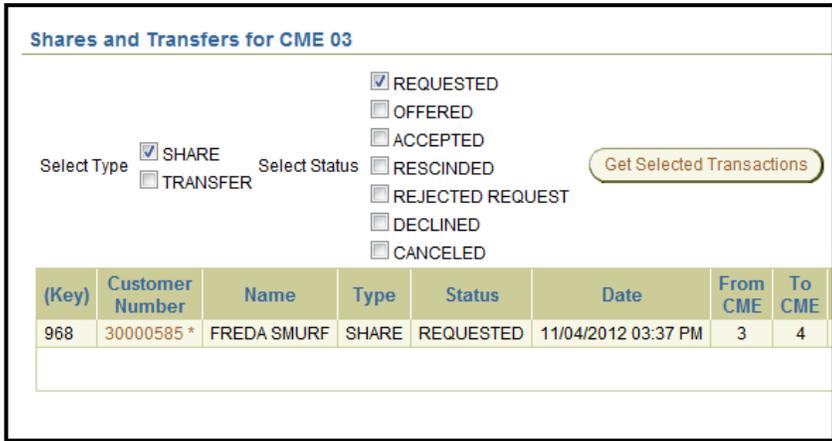
Customer Number	Action Date	Full Name	Type	Status	From CME	To CME
646449 *	12/17/2014	ETHAN FORAKER	TRANSFER	REQUESTED	2	2936
31344 *	12/17/2014	KENNETH JOHNSON	TRANSFER	REQUESTED	2	8084

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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.
		
		
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

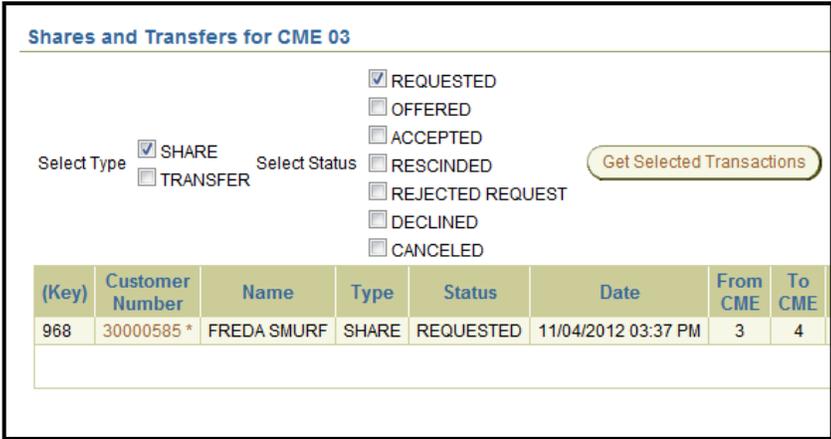
Share-Transfer Workload – Make Offer Continued

Step	Action	Result
4.	Click on the Customer Number link .	The Share-Transfer History region displays on the right side of the window.
5.	Click on the appropriate button, either to offer the Share/ Transfer, or to reject the Share/ Transfer request	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.
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.

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.
		
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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Share-Transfer Workload – Accept, Continued

How To Accept a Share or Transfer Continued

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.
 <p>The screenshot shows the 'Shares and Transfers for CME 03' window. On the left, there are filters for 'Select Type' (SHARE, TRANSFER) and 'Select Status' (REQUESTED, OFFERED, ACCEPTED, RESCINDED, REJECTED REQUEST, DECLINED, CANCELED). A 'Get Selected Transactions' button is present. Below the filters is a table with columns: (Key), Customer Number, Name, Type, Status, Date, From CME, To CME. The table contains one row: 968, 30000585, FRED A SMURF, SHARE, REQUESTED, 11/04/2012 03:37 PM, 3, 4. On the right, the 'Share-Transfer History' section shows 'KAMIS # 30000585 Name FRED A SMURF AAA/CME Primary 3'. Below this is a table with columns: Key, ISN, Type, Status, By, On, Comments. The table contains one row: 968, 968, SHARE, REQUESTED, USERNAME, 11/04/2012 03:37:16 PM, UPR to be added. At the bottom, there are 'Make Offer' and 'Reject Request' buttons, and a note: 'Please note that when a Transfer is accepted existing Shares are rescinded and outstanding Shares and Transfers are canceled.'</p>		
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
		
5.	Click on the Get Selected Transactions button.	List of the organization's shared customers will display.
		

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Rescinding a Customer Share, Continued

How To Rescind a Share Continued

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.

Share-Transfer History

KAMIS # **30000585** Name **FREDA SMURF** AAA/CME **Primary 3**

This SHARE is from CME 3 to CME 4. Status is RESCINDED

Key	ISN	Type	Status	By	On	Comments
160	160	SHARE	REQUESTED	-	04/25/2012 02:19:41 PM	-
160	161	SHARE	OFFERED	-	04/25/2012 02:21:23 PM	-
160	162	SHARE	ACCEPTED	-	04/25/2012 02:21:43 PM	-

7.	Enter a Comment (optional), then click on the 'Rescind Share' button.	The share will be rescinded.
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Forms List [Create New Form](#)

Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care aaa
TRANSFER - from 3 To 5 Reqst 11/04/2012 - Offer 11/04/2012 - Acpt 11/04/2012	11/04/2012	ACCEPTED	3		
SHARE - from 3 To 4 Reqst 11/04/2012 - Offer 11/04/2012 - Acpt 11/04/2012 - Rscnd 11/04/2012	11/04/2012	RESCINDED	3		
FUNCTIONAL ASSESSMENT INSTRUMENT	10/30/2012	APPROVED	3		create CTRL
ADRC OPTIONS COUNSELING	10/19/2012	APPROVED	3		create CTRL

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Comments

[Rescind Share](#)

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.