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Introduction

- When a member is enrolled in one Health Home and would like to be enrolled in another Health Home, the MAPP HHTS transfer function can be used to request the member transfer and to facilitate the end of one enrollment segment and the creation of a new enrollment segment once that transfer request is approved.

- As part of Release 3.1, Health Homes can now initiate the **transfer in** of an enrolled member into their HH from another HH in addition to initiating the **transfer out** of an enrolled member out of their HH into another HH (or from one CMA to another CMA within their HH).

- The transfer function also tracts rejected transfers and transfer requests that go unanswered by a receiving Health Home.

- The following 3 slides introduces scenarios that will be referenced throughout the presentation.

Scenario 1: Jack

Jack is currently enrolled with HH A, but while at his PCP he meets with a HH representative from HH B and expresses that he would like to be served by HH B since his wife also receives services from this HH.

Scenario 2: Wonda

HH A has been working with Wonda for 1 year, but Wonda is moving outside of HH A's service area. HH A decides to transfer Wonda to HH B, which serves the location Wonda is moving to.

Scenario 3: Jessica

Jessica has been working with HH A and CMA C since 2018. CMA C has recently lost a number of staff and no longer has the ability to serve Jessica effectively. HH A determines it is most appropriate to transfer Jessica to CMA D, where she can be better served.

Initiating a Transfer

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Initiating a Transfer

- When a member is enrolled in one Health Home and would like to be enrolled in another Health Home, a HH worker can initiate a Transfer in the MAPP HHTS.

- HHs will now have the ability to initiate either a **transfer in** or a **transfer out**:
  - **Transfer in** – occurs if a HH would like to work with a member that is currently enrolled with another HH.
  - **Transfer out** – occurs if:
    - A HH would like to transfer a member currently enrolled in their HH to a different HH (and therefore stop serving the member).
    - A HH would like to transfer the member from one CMA to another, within their HH

- Transfers are initiated on the "*Member CIN Search*" Screen, instead of from the member's assignment tab.

Initiating a Transfer: Scenarios

How to Initiate a Transfer In Request:
Jack HH A to HH B,
HH B has to request that Jack be transferred in from HH A

Scenario: Jack requests that HH B begin to provide his HH services. A HH B worker should:

1. Navigate to the *"Member CIN Search"* Screen

2. Search for Jack by entering his CIN in the 'Search Criteria'

3. Click on the member hyperlink to open the 'Member Search Report'

4. From the 'Member Search Report' Click on 'Transfer-In Member'

How to Initiate a Transfer In Request:
Jack from HH A to HH B Continued

5. On the 'Transfer In Member' popup complete:

- Begin Date of the Transfer *(if accepted, this is the begin date of HH B's new segment with the member and the day after HH A's segment with the member will end).*

- CMA *(that the member will be enrolled with if the transfer is accepted)*

- Reason for Transfer *(this is a required field)*

- Comments, if you have any

6. Click Next

7. Enter any Consent and POC information

8. Click Create

9. The 'Member Search Report' will display, indicating that HH B created a *pending* Transfer

Jack's pending transfer record will now be available on HH A's **My Transfers** screen and Assignment Download File. It is now the responsibility of HH A to accept or reject the pending transfer.

How to Initiate a Transfer Out Request:
Wonda from HH A to HH B
HH A has to request that Wonda be transferred out to HH B

Scenario: HH A initiates a **transfer out** to HH B. A HH A worker should:

1. Navigate to the *"Member CIN Search"* Screen
2. Search for Wonda by entering her CIN in the 'Search Criteria'
3. Click on the member hyperlink to open the 'Member Search Report'
4. From the 'Member Search Report' click on 'Transfer-Out Member'

How to Initiate a Transfer Out Request: *Wonda from HH A to HH B Continued*

5. On the 'Transfer Out Member' popup complete:

- Effective Date of the Transfer *(if accepted, this is the begin date of HH B's new segment with the member and the day after HH A's segment with the member will end).*
- Health Home *(HH B in this scenario)*
- Reason for Transfer *(required field)*
- Comments, if you have any

6. Click Save

7. The 'Member Search Report' will display, indicating that HH A created a *pending* Transfer

Wonda's pending transfer record will now be available on HH B's **My Transfers** screen and Assignment Download File. It is now the responsibility of HH B to accept or reject the pending transfer.

How to Initiate a Transfer Out Request: *Jessica from CMA C to CMA D*

Scenario: HH A transfers Jessica from CMA C to CMA D. A HH A worker should:

1. Navigate to the "*Member CIN Search*" Screen
2. Search for Jessica by entering her CIN in the 'Search Criteria'
3. Click on the member hyperlink to open the 'Member Search Report'
4. From the 'Member Search Report' Click on 'Transfer-Out Member'

How to Initiate a Transfer Out Request: *Jessica from CMA C to CMA D Continued*

5. On the 'Transfer Out Member' pop up complete:
- Effective Date of the Transfer *(if accepted, this is the begin date of CMA D's new segment with the member and the day after CMA C's segment with the member will end).*
- CMA *(CMA D in this scenario)*
- Reason for Transfer *(required field)*
- Comments, if you have any

6. Click Save

7. The 'Member Search Report' will display, indicating that HH A created a *pending* transfer

Jessica's pending transfer record will now be available on HH A & CMA D's **My Transfers** screen and Assignment Download Files. It is now the responsibility of either HH A or CMA D to accept or reject the pending transfer.

Viewing Transfers: My Transfers Screen

My Transfers Screen

- The 'My Transfers' Screen is accessible to HHs from the quicklinks menu and CMAs from the Shortcuts Menu

- The 'My Transfers' Screen shows a history of all the pending, accepted, rejected or canceled transfers

- From the My Transfers Screen providers can:
  - CANCEL
  - ACCEPT
  - REJECT

- These actions can be performed on the 'My Transfers' screen utilizing the action button to the right of the record

My Transfers Screen

HH view
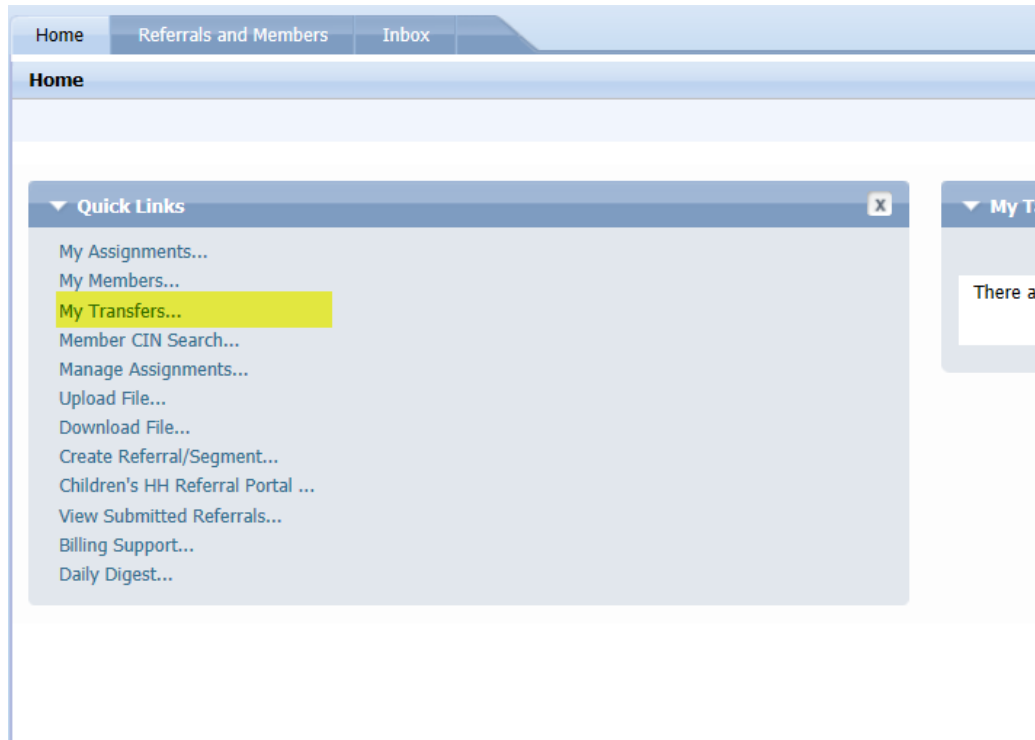
CMA view
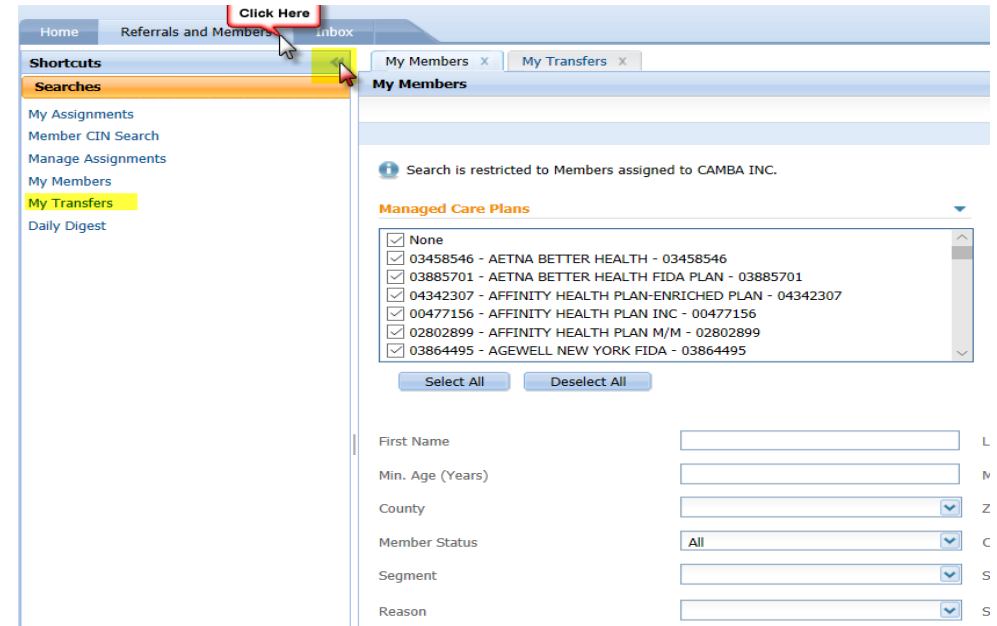
Viewing Transfers on 'My Transfers'

- The 'My Transfers' screen has a history of all Transfers associated with an organization. This includes transfers the organization has initiated, transfers the organization needs to act on and transfers that the organization has already acted on

'My Transfers' Screen: Type and Provider Name

- The 'My Transfers' screen includes the Type and MMIS ID. These fields help the user determine the direction of the transfer and the Provider who initiated the transfer or would receive the transfer.
  - An 'Incoming Transfer From' another HH means that the HH provider looking at the screen would receive the member to provide services to if the transfer is accepted.
    - The HH provider on the screen or the provider that the member is currently with could have initiated the transfer
  - An 'Outgoing Transfer To' means that if the HH provider looking at the screen accepts or accepted the transfer that the member would have a segment with the new Provider listed and no longer be with the HH provider who is logged in.
    - The HH provider on the screen could have initiated this or the provider that will receive the member could have requested the member.

Type	MMISID - Provider Name
Outgoing Transfer To	04277941 - CHHUNY LLC
Outgoing Transfer To	04277941 - CHHUNY LLC
Outgoing Transfer To	04277941 - CHHUNY LLC
Outgoing Transfer To	03559515 - COORDINATED BEHAVIORAL CARE INC
Outgoing Transfer To	03559515 - COORDINATED BEHAVIORAL CARE INC
Incoming Transfer From	03449974 - ADIRONDACK HEALTH INSTITUTE INC
Incoming Transfer From	03449974 - ADIRONDACK HEALTH INSTITUTE INC
Incoming Transfer From	00243178 - NEW YORK PRESBYTERIAN HOSPITAL INC

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'My Transfers' Screen: Status

- Records remain on the 'My Transfers' Screen for perpetuity.

- Providers can use the Status Column to determine if the record has been acted on:
  - Pending – The transfer has been requested, but not acted on
    - This includes both transfers you need to act on and transfers that you are waiting for another HH to act on. If you initiated a transfer you must wait for another HH to act on it.
  - Rejected - A pending transfer was rejected. The member stays with the original HH and CMA
  - Accepted – The pending transfer was accepted. The effective date is used to determine when the initial segment should be ended and a new one started
  - Canceled – A pending transfer was canceled before it was acted on.

Status
Accepted
Accepted
Rejected
Rejected
Accepted
Pending
Canceled
Accepted
Rejected

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'My Transfers' Screen: Additional Fields

- The screen also shows the effective date (date the member will be transferred if accepted), the create date of the pending transfer, and the reason the transfer was initiated.

- By expanding the toggle providers can see the initiator, receiver, and updates

Viewing Transfers: My Transfers Screen Scenarios

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My Transfers Screen: HH A

- HH A has the ability to:
  - **CANCEL** Wonda's pending transfer
  - **ACCEPT** or **REJECT** Jack's pending transfer
  - **ACCEPT** or **REJECT** Jessica's pending transfer on behalf of CMA D. And **CANCEL** as the initiator

My Transfers Screen: HH B

- HH B has the ability to:
  - **ACCEPT** or **REJECT** Wonda's pending transfer
  - **CANCEL** Jack's pending transfer

My Transfers Screen: CMA D

- CMA D has the ability to:
  - **ACCEPT** or **REJECT** Jessica's pending transfer

Viewing Transfers: Files

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Viewing Transfers: HH Assignment File

- The HH Assignment File displays any pending transfers that your organization must act on

- The HH Assignment File also displays any transfer that have been rejected for 30 days after the rejection date

<u>New Fields</u>
- Field 74: 'Health Home Assignment Status' Shows if the transfer record is pending or rejected
- Field 93: 'HH Assignment Record Type' will display transfer for transfer records
- Fields 119/120: 'Transfer Initiator MMIS ID/Organization Name' Display the name of the HH that made the initial transfer request
- Fields 121/122: ' Transfer Receiver MMIS ID/Organization Name' Display the name of the HH that will serve the member if the HH is accepted
- Field 123: 'Transfer Create Date' Displays the date the transfer was created
- Field 124: 'Transfer Effective Date' Displays the start date of the segment if the transfer was accepted
- Fields 125/126: 'Transfer Reason/Comment' Display the reason the transfer was created *or* the reason the transfer was rejected

Viewing Transfers: Enrollment Download File

- Pending Transfer information will display on Enrollment Download files for any members the downloading provider has an active enrollment segment with at the time of the download

34	Child HCBS Flag	706	1	706	Alpha (Y/N)
35	Transfer Initiator MMIS ID	707	8	714	Numeric
36	Transfer Initiator Organization Name	715	40	754	Alpha
37	Transfer Receiver MMIS ID	755	8	762	Numeric
38	Transfer Receiver Organization Name	763	40	802	Alpha
39	Transfer Create Date	803	8	810	Date
40	Transfer Effective Date	811	8	818	Date
41	Transfer Reason	819	75	893	Alpha
42	Transfer Comment	894	300	1193	Alphanumeric

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Assignment and Enrollment Files: *Transfers*

Examples of how transfers will be displayed on files can be found on the MAPP HHTS portion of the HH website:

https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/mapp/index.htm

- Expand the 'Health Home Tracking system' Section
- Click on 'Transfer System Logic

Viewing Transfers: Files Scenarios

Assignment and Enrollment Files Pending Transfers

HH Assignment file

Date File Downloaded	HH Downloading file	Member Name	74	93	119	120	121	122	123	124	125	126
			Health Home Assignment Status	HH Assignment Record Type	Transfer Initiator MMIS ID	Transfer Initiator Organization Name	Transfer Receiver MMIS ID	Transfer Receiver Organization Name	Transfer Create Date	Transfer Effective Date	Transfer Reason	Transfer Comment
7/23/2019	HH A	Wonda	*Wonda Is not included on HH A's assignment file*									
		Jessica	Pending	Transfer	111111111	HH A	11111111	HH A	7/23/2019	8/1/2019	At capacity	
		Jack	Pending	Transfer	22222222	HH B	22222222	HH B	7/23/2019	8/1/2019	Member Requested Transfer	
7/23/2019	HH B	Wonda	Pending	Transfer	11111111	HH A	22222222	HH B	7/23/2019	8/1/2019	Member moved out of service county	Member moved to Wayne County
		Jack	*Jack is not included on HH B's assignment file*									

Enrollment Download

Date File Downloaded	HH Downloading file	Member Name	1 - 34	35	36	37	38	39	40	41	42
			Segment Data	Transfer Initiator MMIS ID	Transfer Initiator Organization Name	Transfer Receiver MMIS ID	Transfer Receiver Organization Name	Transfer Create Date	Transfer Effective Date	Transfer Reason	Transfer Comment
7/23/2019	HH A	Wonda	Complete	11111111	HH A	22222222	HH B	7/23/2019	8/1/2019	Member moved	member moved
		Jessica	Complete	11111111	HH A	11111111	HH A	7/23/2019	8/1/2019	at capacity	
		Jack	Complete	22222222	HH B	22222222	HH B	7/23/2019	8/1/2019	Member requested transfer	
7/23/2019		Wonda	*Wonda is not included on HH B's enrollment file*								
	HH B	Jack	*Jack is not included on HH B's enrollment file*								

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Acting on a Transfer: My Transfers Screen

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My Transfers Screen

- The 'My Transfers' Screen is accessible to HHs from the quicklinks menu and CMAs from the Shortcuts Menu

- The 'My Transfers' Screen shows a history of all the pending, accepted, rejected or canceled transfers

- From the My Transfers Screen providers can:
  - CANCEL
  - ACCEPT
  - REJECT

- These actions can be performed on the 'My Transfers' screen utilizing the action button to the right of the record

My Transfers Screen

HH view
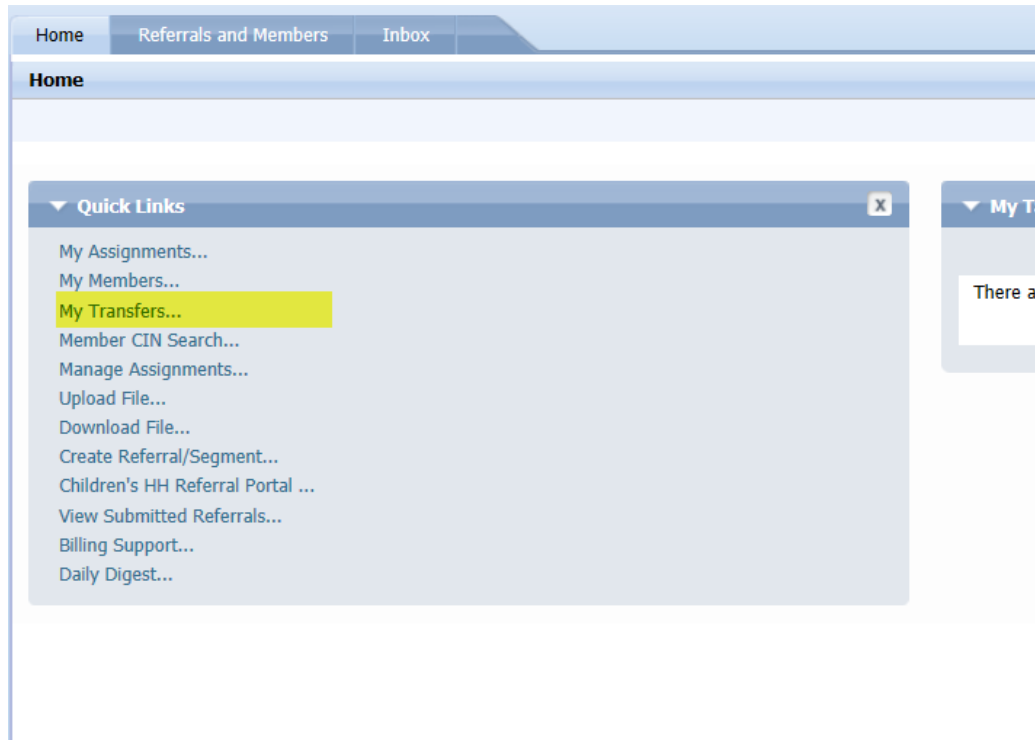
CMA view
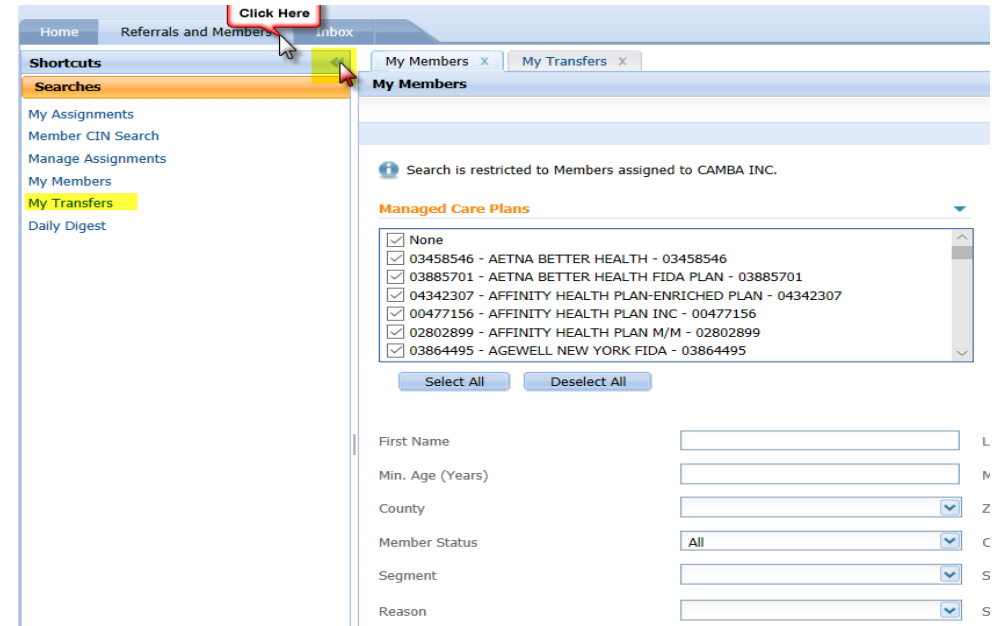
My Transfers Screen: Accepting an outgoing transfer

- When **ACCEPTING** an outgoing HH to HH transfer the HH utilizes the action button on the member record to select 'Accept'
- The 'Enter Segment Details' popup box displays the segment information that was entered by the initiating provider
- By clicking 'Save' the pending transfer is **ACCEPTED**

Status	
Pending	
	Accept...
Pending	Reject...
Pending	

Enter Segment Details

Begin Date   8/1/2019

Provider Details

Health Home   22222222 - HH B
    Care Management Agency   01550370 - MENTAL HEALTH ASSOC ESSEX MH
Reason for Transfer   Member requested Transfer

Comments

Cancel   Save

Scenario: HH A accepts HH B request for Jack. This creates an active segment with HH B and ends HH A's enrollment segment with Jack.

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My Transfers Screen: Accepting an Incoming Transfer

- When **ACCEPTING** an incoming HH to HH transfer the HH utilizes the action button on the member record to select 'Accept'
- The 'Accept Transfer/Create Enrollment Segment' popup box requests the CMA that the enrollment segment should be created with.
- By clicking 'Next' the provider is able to add consent and POC information associated with the segment
- By clicking 'Create' the provider is able to create the segment

Scenario: HH B accepts Wonda's incoming transfer from HH A. This creates a segment with HH B and ends the segment with HH A.

* Incoming CMA transfers, or outgoing HH transfers from CMA to CMA will also display these same screens

My Transfers Screen: Rejecting Transfers

- When **REJECTING** an incoming or outgoing HH to HH transfer the HH utilizes the action button on the member record to select 'Reject'
- The 'Reject' popup box requests the reason the pending transfer is being rejected and any comments
- By clicking 'Save' the pending transfer is **REJECTED**

Scenario: HH A rejects HH B's request to serve Jack and states they have already referred Jack to another HH. HH A continues to have a segment with Jack.

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Acting on a Transfer: Tracking System Files

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Acting on Pending Transfers:
Tracking File Uploads

Transfers can also be **ACCEPTED** or **REJECTED** for _adults_ via the tracking file upload (children must always be accepted via the 'My Transfers' screen)

ACCEPTING a pending transfer:
- Utilize the Tracking File Segment Record
  - 'Record Type' = C
  - 'Member ID' = ID of member with pending transfer
  - 'Date of Birth' = complete
  - 'Gender' = Complete
  - 'Begin Date' = Effective date of transfer
  - 'Outreach/enrollment code' = E
  - 'HH MMIS ID'/'CMA MMIS ID' =
    - Incoming transfer – the HH and CMA of the new segment
    - Outgoing transfer – the HH and CMA of the current segment
  - 'Referral Code' = T

REJECTING a pending transfer:
- Utilize the Tracking File Assignment Records
  - 'Record Type' = D
  - 'Member ID' = ID of member with pending transfer
  - 'Begin Date' = effective date of the transfer

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Acting on a Transfer: Tracking System Files Scenarios

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Tracking File Actions: HH A

Accept Records

- HH A accepts Jessica's pending transfer on behalf of CMA D
  - The MMIS ID of the CMA is that of CMA D
- HH A accepts Jack's transfer out to HH B
  - The MMIS ID of the HH and CMA are that of the current segment Jack is in with HH A

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	Record Ty	Member I	Date of Bir	Gender	Begin Dat	End Date	Outreach/	HH MMIS	CMA MMIS	Direct Bill Indica	Adult or C	TBD2	Referral C	Segment	Consent D	NYSID	End Date	Pend Star	Pend Reas	Pend Reas	End Health Home Assign
3	C	BB12345B	08151986	F	08012019		E	11111111	99999999				T								
4	C	CC12345C	120661984	M	08151986		E	11111111	777777777				T								

Reject Records

- HH A rejects Jessica's pending transfer on behalf of CMA D
- HH A rejects Jack's transfer out to HH B

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Record Ty	Member C	Effective Date													
2	D	BB12345B	08012019													
3	D	CC12345C	08012019													

Tracking File Actions: HH B

Accept Records

- HH B accepts Wonda's pending transfer
  - The MMIS ID of the CMA that HH B would like to use in the enrollment segment they are creating

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Record Ty	Member I	Date of Bir	Gender	Begin Dat	End Date	Outreach/	HH MMIS	CMA MMIS	Direct Bill Indica	Adult or C	TBD2		Referral C	Segment I	Consent D	NYSID		End Date	Pend Star	Pend Reas	Pend Reas	End Health Home Assignment
3	C		AA12345A	08151986	F	08012019		E		22222222	99999999			T									

Reject Records

- HH B rejects Wonda's transfer into HH B

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Record Ty	Member (	Effective Date										
2	D	AA12345A	08012019										

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Viewing Transfers:
Member CIN Search

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Viewing Transfers:
Member CIN Search Screen

- The 'Member CIN Search Screen' and 'Member Search Report' both show pending transfer information

Member	Program Participation	DOB	Medicaid End Date	Coverage Code	Managed Care Plan	Health Home	Care Management Agency	HARP	Segment	Status	Start Date	End Date	Pending Transfer
Wonda - AA12345A		11/18/1973		30	FIDELIS CARE - 04004486	HH A - 11111111	MENTAL HEALTH AMERICA DUTCHESS CO - 02324885	Enrolled	Enrollment	Active	1/1/2016		Yes

Member Search Report

Member	Wonda - AA12345A
Generated On	7/23/2019
Latest Address	
Latest Phone	
Medicaid End Date	
Assigned Health Home	
Enrolled Health Home	HH A - 11111111
Managed Care Plan	FIDELIS CARE - 04004486 8/1/2016 - 12/31/9999
Coverage Code	30
Coverage Code Description	30-CLIENT IS ELIG FOR MCAID AND ENROLLED IN A PCP (P)

Program Participation	
Opt-Out Signature Date	
Opt-Out Submission Date	
Opt-Out Submitted by User	
Opt-Out Submitted by Organization Name	
Pending Transfer Create Date	7/23/2019
Pending Transfer Effective Date	8/1/2019
Pending Transfer Initiated By	HH A

Print   Transfer-Out Member...   Transfer-In Request...

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Viewing Transfers: Member CIN Search Screen Continued

Initiator	Segment	Direction	Action	Question to Ask	Scenario
Y	Y	Out	None	none	Wonda/HH A
Y	N	In	None	none	Jack/HH B
N	Y	Out	Accept/Reject	Allow another HH to work with the member?	Jack/HH A
N	N	In	Accept/Reject	Will you work with the member?	Wonda/HH B

Viewing Transfers:
Member CIN Search Download

- Pending Transfers will show on the Member CIN Search Download

- Fields 104-111 have been added to capture Transfer information

- The '*Member CIN Search'* Download shows additional information, such as the Receiver. The Receiver will always be the organization that would have the newly created segment and be working with the member if the segment were to be accepted.

	Name				
104	Pending Transfer Initiator MMIS ID	2199	8	2206	Numeric
105	Pending Transfer Initiator Organization	2207	40	2246	Alpha
106	Pending Transfer Receiver MMIS ID	2247	8	2254	Numeric
107	Pending Transfer Receiver Organization	2255	40	2294	Alpha
108	Pending Transfer Create Date	2295	8	2302	MMDDYYYY, Numeric
109	Pending Transfer Effective Date	2303	8	2310	MMDDYYYY, Numeric
110	Pending Transfer Reason	2311	75	2385	Alpha
111	Pending Transfer Comment	2386	300	2685	Alphanumeric

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Additional Resources

- For additional information on transfer logic:
https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/mapp/index.htm
  - Health Home Tracking System – 'Transfer System Logic'

- For current file specifications:
https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/mapp/index.htm
  - Tracking System File Formats – 'MAPP HHTS File Specifications Document v3.1'

- For release information:
https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/mapp/index.htm
  - Health Home Tracking System – 'Draft 2019 MAPP HHTS Release Schedule'

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Health Home Contact Information

- For Questions regarding billing of transitioning Children's HCBS services contact the children's team at HHSC@health.ny.gov

- For MAPP HHTS issues, contact: MAPP Customer Care (518) 649-4335 or email MAPP-CustomerCareCenter@cma.com

- For HH policy questions, contact the DOH Health Home Provider Line (518) 473-5569 or submit an email using the HH email web form: https://apps.health.ny.gov/pubdoh/health_care/medicaid/program/medicaid_health_homes/emailHealthHome.action

- For MAPP HHTS presentations: https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/mapp/index.htm

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