ST. JOSEPH'S HEALTH
A Member of Trinity Health

ST PETER'S HEALTH PARTNERS
A Member of Trinity Health

Community Health Connections Health Home

CMA to CMA Transfer Protocols

Revised October 2022

The following steps must be taken to ensure a smooth transition from CMA to CMA and to minimize any disruption in services to the Member.

Due to communications between CareManager and MAPP and the Health Home billing structure, all transfers must occur on the first day of the month

	Transfers Due to Member Behaviors
☐	Discuss Concerns with Member
☐	• Review Member Rights and Responsibilities
☐	• Complete Statement of Understanding with Member
☐	If concerns persist, Contact Lead Health Home
☐	• Lead Health Home will contact the Member, if appropriate

	Transfer Protocols (followed regardless of reason for transfer)
☐	Identify New CMA
☐	• Contact CMAs to determine who can take the case
☐	• Discuss transfer with Member, letting Member know which agency is taking case
☐	Prepare case for transfer to new CMA
☐	• Obtain written consent for the new CMA on Page 3 of the DOH 5055
☐	• Ensure all information in CareManager is up to date (notes, documents, etc.)
☐	• Schedule call or case conference with receiving agency to review most recent Comprehensive Assessment, Plan of Care and Member Concerns as well as the date of transfer. *Note: The date of transfer must be the first day of the month.*
☐	• Send transfer letter to the Member with the details of the transfer (date, contact information for new CMA and Care Coordinator)
☐	Submit the Case Transfer Request Form to CRHC for transfer to occur in CareManager
☐	New / Receiving CMA:
☐	• Review Assessment and Plan of Care with Member
☐	• Review note documentation from previous CMA