

Community Health Connections Health Home

Case Transfer Quick Guide

Revised October 2022

YES



When transferring a case to another CMA within CHC, please be sure to DO the following BEFORE submitting the Transfer Request Form

- ✓ Ensure written consent for the receiving agency is on Page 3 of the DOH 5055.
- ✓ Have a case conference – at a minimum – with the receiving agency. Best practice is for warm handoffs (i.e., in person meetings with the Member) to ensure continuity of care.
- ✓ Identify the transfer date, which **MUST** be the first day of the month, as specified on the Transfer Request Form.
- ✓ Inform the Member in writing of the transfer date and contact information for the receiving CMA.
- ✓ Ensure all documentation is finalized in CareManager (Notes, Plans, Assessments, HML) and up-to-date (Plans and Assessments) and all attachments are uploaded.

NO



Do NOT do the following when transferring a case within CHC

- ✘ Do NOT discharge the case in CareManager – leave the Member in enrolled status.
- ✘ Do NOT submit a referral to the Lead Health Home or receiving CMA.
- ✘ Do NOT pursue a transfer if the Member is not engaged with the releasing CMA (delaying consent).
- ✘ Do NOT pursue a transfer for any Members in DSE or Excluded Setting.
- ✘ Do NOT send in the Transfer Request Form until all required steps are completed; sending in the form is the last step in the transfer process.