

Statewide Process for Transfers of APD/AAA Service Consumers

The process is to be followed by all Aging and People with Disabilities (APD) and Area Agencies on Aging (AAA) offices within the state.

The process was developed and reviewed by local managers to define a uniform, efficient approach for transferring an Oregonian's service case between APD/AAA offices.

Foundational agreements

1. **Timing** - Before the 15th of the month no case transfers should be made if there is an assessment due in the current month. After the 15th of the month, no transfers should be made if the assessment is due the following month. If the Oregonian has already moved, a request for courtesy assessment should be done as soon as possible.
2. **Pending** - No transfers should be made with any pending case management tasks. Including reviewing case alerts in ONE, if applicable.
3. **Diversion/Transition** - Any case being transferred that has Diversion/Transition (D/T) involved must be staffed between the sending and receiving branch prior to transfer.
4. **Required Contacts** - All contacts, including risk, should be completed for the month, prior to transfer.
5. **New Plan** - The new service plan for the new setting, Home Care Worker(s) (HCWs), or Agency (IHCA) should be approved prior to transferring. 512s for facilities should be created, prorated liability on the SBEG needs to be calculated, and CM needs to verify the 512 is not in suspend status. POC for IHCA or Nursing Facility (NF) should be set-up in MMIS.

6. **Temporary Placements** - Transfers will not be made for any temporary placements when the person's intent is to return to the county holding the case. (i.e., Oregonian placed in NF out of area temporarily will be kept by the county holding the case when they intend to return to that county.)
7. **Documentation** - All applicable Case Management related documents have been uploaded to Laserfiche prior to transfer.
8. **Internal Check** - Sending branch will review case utilizing their internal process prior to transferring.

General considerations

1. The template provided is to be used in case narration and transfer email.
2. A secure email to the receiving branch's transfer email box is required.
SUBJECT LINE: #Secure# LTSS TRANSFER, SPPC TRANSFER, or OPI-M TRANSFER
3. If two-consumer household, both cases should be transferred in one email.
4. Sending APD or Type B AAA Case Manager (CM) will follow their local process on ensuring the address and living arrangement is updated in ONE. Type A AAA offices will notify their local APD office to make the needed updates in ONE after checking if they have active benefits in ONE.
5. Sending CM will assure that Medical Related Payments (MRPs) in ONE are set up correctly, if applicable.
6. In-Home cases, the sending CM will follow the PTC 3.3 Process for Staff: Consumer Transfers to a New Branch or Program
7. Sending CM will assure services are ended if not continuing in new service area by existing provider. Example: notify and end Adult Day Services (ADS), Emergency Response System (ERS), Long-Term Care Community Nurse (LTCCN), IHCA, Home Delivered Meals (HDMs), Oregon Project Independence-M (OPI-M) Ancillary services (ongoing medical supplies), etc.

8. OPI-M Only: Cases with OHP+ (OSIPM or MAGI) medical will transfer to local APD or Type B AAA office for ongoing service case management. Cases without OHP+ will transfer to Type A AAA or Type B AAA office for ongoing service case management.

Templates

The following templates should be used for transfer email and be narrated in Oregon ACCESS.

Outgoing case (LTSS or SPPC)

Name:

Prime:

Sending CM:

Sending Branch:

Receiving Branch:

Additional Case Info: (relevant to the specific consumer's situation)

Language preference:

Voter reg:

Service setting: In-Home, CBC facility, NF

Facility Name:

Direct/Indirect contact made and date:

All relative docs in Laserfiche or ONE: (e.g., Exceptions, SPAN, ICP)

CA/PS due date:

Extended Waiver Eligibility:

Modified Service Plan:

Service Liability Calculation:

Medical Related Payments in ONE:

Home Delivered Meals:

Emergency Response System:

Adult Day Services:

K-Plan Ancillary Services:

LTCCRN:

BSS:

Information to be included in **EMAIL** only:

Important information for the Receiving CM, which may include Adult Protective Services (APS) referrals, Serious Incident, Exceptions, Exception monitoring, ongoing Special Needs Payments, risk identified (please note if immediate mitigation is needed).

Outgoing case (OPI-M)

Name:

Prime:

Sending SCM:

Sending Branch:

Receiving Branch:

Additional Case Info: (relevant to the specific consumer's situation)

Language preference:

Voter reg:

Direct/Indirect contact made and date:

All relative docs in Laserfiche:

Financial and Service eligibility redetermination due date:

PLAN due date:

OHP+ (OSIPM or MAGI):

Keeping same HCW or IHCA:

Home Delivered Meals:

Emergency Response System:

Adult Day Services:

OPI-M Ancillary Services:

LTCCRN:

Information to be included in **EMAIL** only:

Important information for the Receiving CM, which may include APS, Serious Incident, risk identified (please note if immediate mitigation is needed).

Case transfer emails:

- LTSS, SPPC or OPI-M Cases transferring to APD or AAA Type B Transfer Offices use the [Branch Transfer Email List](#).

- OPI-M cases transferring to AAA Type A or Type B Contract Offices use the below emails:

AAA Office	Branches	Counties	Email
CAPECO	8210	Gilliam, Morrow, Sherman, Umatilla, Wasco, Wheeler	pendleton-hermistonopim@capeco-works.org thedallesopim@capeco-works.org
CAT	0512	Columbia	seniorp@cat-team.org
CCNO	0112, 3113, 3114, 9010	Baker, Grant, Union Wallowa	8310.hcw.payroll@ccno.org
CCSS	0312	Clackamas	opi-waitlist@clackamas.us
COACO	0912	Crook, Deschutes, Jefferson	opim@councilonaging.org
DCSSD	7610	Douglas	opim@douglascountyor.gov
HCSCS	1312	Harney	1312.hcw.payroll@harneyhub.org
KLCCOA	1812, 1814	Klamath, Lake	cmcommunicationd11@klccoa.org
MCOACS	2312	Malheur	opi-m@mcoacs.org
SCBEC	0612, 0812	Coos, Curry	opimcoos@scbec.org
WCDAVS	3412	Washington	davscm@washingtoncountyor.gov
RVCOG	7810	Jackson, Josephine	opim@rvcog.org
MCADVS	2814, 2812, 1415, 2512, 3519, 1412, 3512, 7210	Multnomah	opi.programs@multco.us

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