How to Enter a CDDP Transfer on the DD Eligibility Add Page

eXPRS allows CDDPs to directly enter intake and DD eligibility information for an individual by using the **DD Eligibility Add** page[1]. This guide contains instructions on entering DD Eligibility when an individual is transferring CDDPs (known as a **CDDP Transfer**).

When an individual is transferring their case management services from one CDDP to another CDDP, there are many tasks that are completed outside of eXPRS[2]. In general, there are specific tasks in eXPRS for both the Sending and Receiving CDDP.

General Outline of eXPRS Actions Needed Prior to Transfer:

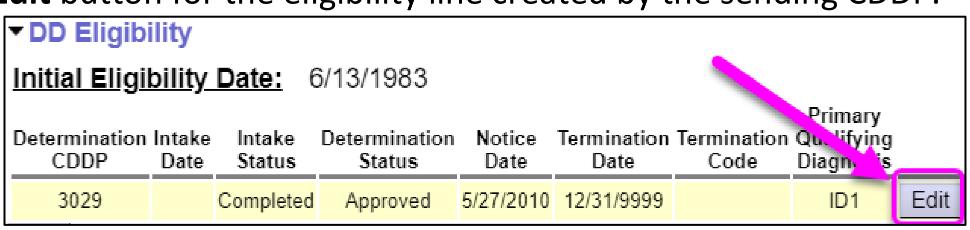
I. **Sending CDDP -** End all Service Prior Authorizations (SPAs) and the Plan of Care
II. **Sending CDDP -** End all other service Client Prior Authorizations (e.g. SE51)
III. **Sending CDDP -** End SE48 CM CPA and other CM CPAs (as needed)
IV. **Receiving CDDP -** Create SE48 CM CPA and other CM CPAs (as needed)
V. **Receiving CDDP -** Create Plan of Care and SPAs
VI. **Receiving CDDP -** Create other service CPAs

Once the sending and receiving CDDPs complete their tasks, the receiving CDDP can follow the steps below to update DD Eligibility. To do the work in the guide, the user must have one of the following roles:

- **CDDP Eligibility Specialist**
- **CDDP Eligibility Specialist Processor**
- **CDDP Eligibility Termination Processor**

How to Enter a CDDP Transfer on the DD Eligibility Add Page:

1) Login and search for the individual's record using the **View Client** page[3] and select the **DD Eligibility > Edit** button for the eligibility line created by the sending CDDP.

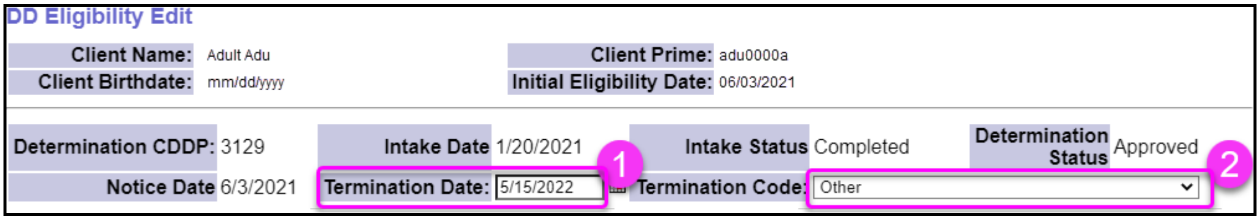


[1] For more information, see the guide: **Overview of the DD Eligibility Add Page**

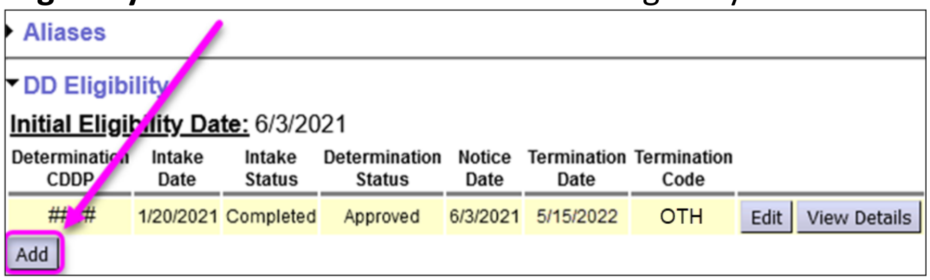
[2] For information on the various types of transfers, as well as Worker Guides and other resources, see the [DD Case Management Tools Webpage](), the **eXPRS Tasks for Client CME Transfers** guide, and the **CME Pro-Tip – How Case Management CPAs Affect the Plan of Care** guide.

[3] For steps, see the guide and video: **How to use the View Client Page in eXPRS**

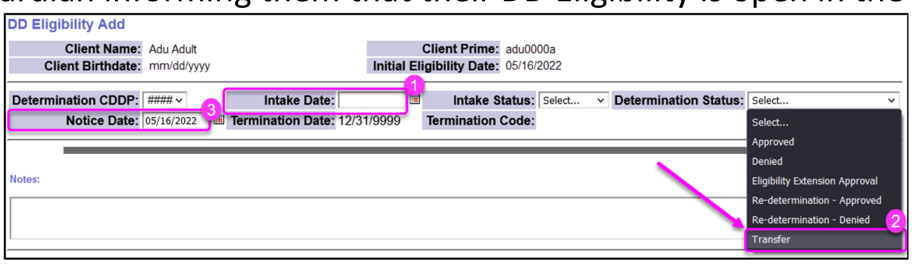
2) On the DD Eligibility page, take the following steps and then select **Save**:
   - Adjust the **Termination Date** to one day prior to the receiving CDDP's open date.
   - Set the **Termination Code** to **Other.**



3) Select the **DD Eligibility > Add** Button to create a new eligibility line.



4) On the **DD Eligibility Add** page, enter the following information:
   1. **Intake Date:** Leave this field blank.
   2. **Determination Status:** Select **Transfer** to indicate a CDDP Transfer
   3. **Notice Date:** The date the Transfer Memo notice was sent to the individual and/or their guardian informing them that their DD Eligibility is open in the new county.



5) Complete the rest of the **DD Eligibility Add** page for the individual. The information entered will likely be the same as was entered on the Sending CDDP's eligibility line. For more information, see the guides:
   - **How to Enter Early Childhood DD Eligibility**
   - **How to Enter School Age DD Eligibility**
   - **How to Enter Adult DD Eligibility**

6) You will be returned to the individual's record and can see the new eligibility Line.