eXPRS Task List for CME to CME Case Transfers
(CMEs)
(updated 5/13/2022)

Access to I/DD services in Oregon starts at a CDDP*****. A CDDP is responsible for determining an individual's overall eligibility as I/DD in Oregon and serves as the main referral point for all other I/DD services.

*The exception to this is for children who are "CIIS Only" accessing services under the CIIS medical waivers. These children may not have overall I/DD eligibility determined by a CDDP.

While there may be many tasks and meetings needed to facilitate an individual's transfer of their Case Management services to a new CME that are outside the scope of eXPRS, this guide outlines the specific tasks that must be completed in eXPRS to transfer and maintain a continuity of services to the individual.

To reduce the risk of delayed billing and payment of services to the individual, **best practice** is to complete the majority of the eXPRS CME Transfer tasks **prior to** the agreed upon transfer date.

This guide outlines the eXPRS Tasks involved for the following CME transfers:

CDDP to CDDP

Sending (Old CDDP)	**Receiving** (New CDDP)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.	2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.	
4. Complete and submit a DDEE form *if there will be a change in service setting with transfer* (ex: was in Res, now will be In-home).	

5. Prior to transfer date, end eXPRS services for the individual, ***in this sequenced order***:
  a. Plan of Care, and/or
  b. Other service CPAs *(SE50, SE51, SE53)*
  c. SE48 CM CPA	

	6. Prior to transfer date, create eXPRS services, in this order:
	  a. SE48 CM CPA
	  b. Plan of Care
	  c. Other service CPAs; if any *(SE50, SE51, SE53)*

	7. Once the current date is past the transfer date *(ie: past start date of the receiving CME's SE48 CM CPA)*, DD Eligibility segments for the individual can be updated. ***This work is retroactive***.
	➔ **_NOTE_**: an SE48 CM CPA for the individual must be in at least ***draft*** status for the receiving CDDP to do this work.
	  a. End the sending CME's DD Eligibility segment **the day before** your CME DD Eligibility is determined.
	  b. Add your DD Eligibility segment for the individual.

CDDP to BROKERAGE

Sending (CDDP)	Receiving (Brokerage)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.	2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.	
4. Complete and submit a DDEE form *if there will be a change in service setting with transfer* (ex: was in Res, now will be In-home).	
5. Prior to transfer date, end eXPRS services for the individual, **_in this sequenced order_**: a. Plan of Care, and/or b. Other service CPAs *(SE50, SE51, SE53)* c. SE48 CM CPA	
6. Prior to transfer date, create new SE48 CM CPA that designates the Brokerage.	
	7. Prior to transfer date, create eXPRS services, in this order: a. SE148 CM CPA b. Plan of Care

CDDP to CDDP with, but no change in, Brokerage

Sending (Old CDDP)	Brokerage (no change)	Receiving (New CDDP)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.		2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.		
4. Prior to transfer date end SE48 CM CPA that designates the Brokerage.	No Brokerage SE148 CM CPA or POC changes are needed. ***However, SPAs & SDs/Claims will fail if the SE48 CM CPA transfer work*** *(steps 4 & 5)* ***is not completed fully.***	5. Prior to transfer date, create SE48 CM CPA that designates the Brokerage
		6. If DD Eligibility updates are needed, once the current date is past the start date of the receiving CME's SE48 CM CPA, DD Eligibility segments can be updated. a. Receiving CME can end the existing DD Eligibility segment the day BEFORE their new segment is to start. b. Add a new DD Eligibility segment for the individual.

CDDP to State Kids Services

Sending (CDDP)	Receiving (State Kids Res or CIIS)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.	2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.	
	4. If a CIIS transfer, CIIS will complete Kids Waiver enrollment and service eligibility coding updates.
5. Complete and submit a DDEE form *if there will be a change in service setting with transfer* (ex: was in In-Home, now will be Res).	
6. Verify or update the individual's POC to reflect any services authorized that will be completed ***prior to*** their transfer to State Kids Services *(ex: any Behavior Consultation services that will be completed prior to transfer)*.	

7. Prior to transfer date, end eXPRS services for the individual, ***in this sequenced order:***
  a. Plan of Care services
  b. Other service CPAs (not CM)
➔ **DO NOT end your SE48 CM CPA**; SE48 enrollment from a CDDP must continue to support State Kids Services.	

	8. Prior to transfer date, create eXPRS services, ***AFTER CDDP has first ended their POC services****, in this order:
	  1. SE248 CM CPA
	  2. Plan of Care services
	
	*Waiting for the CDDP to end their POC first before creating the SE248 CM CPA will prevent the State CM CPA from hijacking the CDDP's POC.

CDDP to CDDP with, but no change in, State Kids Services

Sending (Old CDDP)	State Kids (no change)	Receiving (New CDDP)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.		2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.		
4. Prior to transfer date, end your SE48 CM CPA.		
	No State Kids SE248 CM CPA changes are needed. ***However,*** 5. State Kids will need to end their current POCs as of the transfer date to allow the new CDDP CM CPA to go through. And then can move the POC/SPA end dates back out again once completed. ***Keep in mind: Kids Svcs SPAs & SDs/Claims will fail if the SE48 CM CPA transfer work is not completed fully.***	
		6. Prior to transfer date, create/submit SE48 CM CPA. ******SE48 enrollment from a CDDP ***must continue*** to support the State Kids Services.

		7. If DD Eligibility updates are needed, once the current date is past the start date of the receiving CME's SE48 CM CPA, DD Eligibility segments can be updated. • Receiving CME ends the existing DD Eligibility segment the day BEFORE their new segment is to start. • Add new DD Eligibility segment for the individual.

BROKERAGE to BROKERAGE, no change in CDDP

Sending (Old Brokerage)	CDDP (no change)	Receiving (New Brokerage)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.		2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.		
4. Prior to transfer date, end eXPRS services for the individual, _**in this sequenced order:**_ a. Plan of Care b. SE148 CM CPA		
	5. Prior to transfer date, end current SE48 CM CPA that designates the sending Brokerage.	
	6. Prior to transfer date, create new SE48 CM CPA that designates the receiving Brokerage	
		7. Prior to transfer date, create eXPRS services, in this order: a. SE148 CM CPA b. Plan of Care

BROKERAGE/CDDP to new BROKERAGE/CDDP

Sending (old)		Receiving (new)	
Old Brokerage	**Old CDDP**	**New CDDP**	**New Brokerage**
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.		2. Receive and review packet.	
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.			
4. Prior to transfer date, end eXPRS services for the individual, _**in this sequenced order:**_ a. Plan of Care b. SE148 CM CPA			
	5. Prior to transfer date, end current SE48 CM CPA that designates old Brokerage.		
		6. Prior to transfer date, create new SE48 CM CPA that designates new Brokerage	
			7. Prior to transfer date, create eXPRS services, in this order: a. SE148 CM CPA b. Plan of Care

		8. If DD Eligibility updates are needed, once the current date is past the start date of the receiving CME's SE48 CM CPA, DD Eligibility segments can be updated.
		   a. Receiving CME ends the existing DD Eligibility segment the day BEFORE their new segment is to start.
		   b. Add new DD Eligibility segment for the individual.	

State Kids Services to CDDP

Sending (State Kids)	Receiving (CDDP)
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.	2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.	
	4. Update/Determine DD Eligibility, as needed.
5. Prior to transfer date, end eXPRS services for the individual, **_in this sequenced order:_** a. Plan of Care b. SE248 CM CPA	
	6. Prior to transfer date, create eXPRS services, in this order: a. SE48 CM CPA *(if no SE48 CPA &/or if the individual is newly DD Eligible).* b. Plan of Care c. Other service CPAs, as needed *(SE50, SE51, SE53).*

Brokerage to CDDP

Sending Brokerage	Receiving CDDP
1. Complete and send all referral paperwork, per ODDS CME Transfer policy and Worker Guide.	2. Receive and review packet.
3. Hold ISP team exit/entry meetings as needed; determine official transfer date.	
4. Complete and submit a DDEE form *if there will be a change in service setting with transfer* (ex: was in Res, now will be In-home).	

5. Prior to transfer date, end eXPRS services for the individual, *__in this sequenced order:__*
  a. Plan of Care
  b. SE148 CM CPA	

	6. Prior to transfer date, end current SE48 CM CPA that designates old Brokerage & create new SE48 CM CPA (if needed).

	7. Create other eXPRS services:
	  a. Plan of Care
	  b. Other service CPAs *(SE50, SE51, SE53).*