**MESSAGES** 







# FSP CLIENT TRANSFER PROCEDURE IN THE DCR

You try to open a PAF for your new FSP client and see the following messages:

1. CSI number matched our records

Complete the PAF and submit

2. CSI number already exists for another partner

stop and cancel the PAF. This client needs to be transferred to your program. See the transfer procedures

1

4

3. CSI number did not match our records

Verify the CSI number (if correct, the DCR may not have been updated yet).
Complete the PAF and submit

# TRANSFER OUT

After receiving the transfer request from a program, search for the client in the DCR

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В

If the client is still active at your program (has not been discharged), see the transfer procedures for clients active at both FSP programs

If the client has been discharged from your program, reactivate them. Enter the "Transfer Date" from the new program, (see figure 1)

Update the "Administrative Information" of the system-generated PAF if the gap time more than a year or KET if the gap time within a year (see figures 2a-b) using information from the new program

Inform the requesting program that the transfer is complete

## TRANSFER IN

Look up the client in CCBH to determine where they are receiving services

Contact that program to request a client transfer. Securely provide the following information:

Client's name, CSI#, DOB, Transfer Date, Provider Number/ NPI, Coordinator ID

Wait for the other program to finish the transfer

After you have confirmation that the client is transferred to your program, check the DCR to determine if the client was transferred using a PAF or a KET

Inactive for 12
months or more
If a new PAF was
generated for the
transfer, update the
remaining
information on the
PAF

Inactive for less
than 12 months
If a KET was
generated for the
transfer, open a
new KET and
update the rest of
the information

**CLIENT TRANSFER PROCEDURE** 

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### SPECIAL CASE: CLIENT IS ACTIVE AT BOTH FSP PROGRAMS

# **TRANSFER OUT**

The client has not been discharged from your program and is still actively receiving services

Open a new KET and update the "Administrative Information" (see figure 2b) with the provided information from the requesting program

Inform the requesting program that:

1) They can see the client in the DCR now

2) The client is active at both programs. Your program (the initial program) is solely responsible for entering all 3Ms and KETs until the client is discharged from your program

### TRANSFER IN

After you have confirmation that the client is active at both programs, follow these instructions:

3M You still collect 3Ms but not enter them into the DCR

3

KETs
You still collect KETs
and send them to
the initial program
to enter into the
DCR

# If the client is discharged from the initial program

Open a new KET to discharge the client from your program

Reactivate the client using the same discharge date

Inform the other program that the client was discharged from your program; the other program is now solely responsible for updating 3Ms and KETS

If the client is discharged from the initial program, your program is now responsible for collecting and entering all KETs and 3Ms in the DCR

Note: Please enter the provider site ID/ NPI for every KET during the time the client is active at both programs







# **Appendix**

Figure 1. Reactivating the client

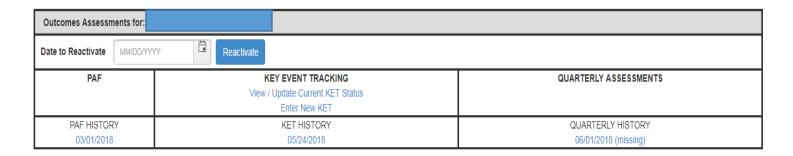


Figure 2a. Updating the Administrative Information of system-generated PAF example

#### ADMINISTRATIVE INFORMATION

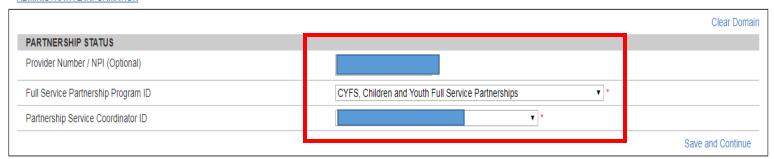


Figure 2b. Updating the Administrative Information of system-generated KET example

