


UCare Connect/Connect + Medicare

Care Coordination and Long-Term Services and Supports

Title: Transfer Member Job Aid

Purpose: To aid in the process of determining when and how to complete a member THRA. The rules and regulations will be addressed, in addition to best practice tips.

Summary: The care coordinator (CC) may use a Transfer Health Risk Assessment (THRA), in lieu of a full assessment, when a Health Risk Assessment (HRA)-MCO was completed and obtained within the last 365 days. The purpose of the THRA is to capture the necessary information and member health risks with minimal disruption to the member. The THRA form is used to guide you through the review of the most current assessment, allowing the opportunity for the CC to make updates, fill in gap areas and create/modify goals. By completing the THRA, the CC is adopting the assessment and support plan as their own and attesting to the accuracy and regulatory compliance of the assessment. If at any time, a care coordinator feels that a new assessment is necessary or in the best interest of the member, a new assessment may be completed.

	Definitions
	<p>Delegate to Delegate Transfer: Member transfers from one UCare delegate agency or county to another (e.g., Olmsted County to Wadena County).</p>
	<p>MCO to MCO Transfer: Member transfers from one Managed Care Organization (MCO)/health plan to another (e.g., Medica to UCare).</p>
	<p>Product Change: Member changes from one UCare product to another (e.g., Connect to Connect + Medicare or vice versa).</p>

CC reviews the following documents to complete a THRA in lieu of a new assessment:

- HRA-MCO completed within the last 365 days (required)
- Support Plan
 - Care coordinator may complete a support plan if not received or at CC discretion due to significant updates
- Member signature sheet
 - If not received, CC may complete or document two attempts to obtain a member signature to meet requirements
- Relevant case notes (optional)
- DHS-6037 (optional)

When transfer documents are received, a THRA can be completed in the scenarios below:

Scenario	Complete THRA	New Assessment	Review & Document
Member transfers from one UCare delegate to another UCare delegate (example: Clay County to Becker County)			<input checked="" type="checkbox"/>
Member has a product change within the same plan type (e.g., Connect to Connect + Medicare)	<input checked="" type="checkbox"/>		
Member transfers from another MCO to UCare	<input checked="" type="checkbox"/>		
Member moves from FFS to UCare		<input checked="" type="checkbox"/>	
Member resides in a skilled nursing facility	<input checked="" type="checkbox"/>		
Member was previously UTR/Refusal		<input checked="" type="checkbox"/>	

Transfer Health Risk Assessment: Revised MnCHOICES HRA-MCO

- CC receives/reviews transfer documents from the previous entity and determines if a THRA is appropriate
- CC completes UCare's THRA document found on UCare's website with the member and make updates to the Support Plan-HRA as needed. Attach UCare's THRA document in MnCHOICES.
 - If the member is UTR or refusal at the time of the THRA, do not complete UCare's THRA document or a UTR/Refusal support plan. Document attempts to reach the member to complete the THRA. Review the HRA-MCO and Support Plan independently. Document review in the member's record. Update the current MnCHOICES Support Plan as needed.
 - Complete MnCHOICES entry
 - Start a new HRA-MCO form and complete "assessment information" section
 - **HRA Type:** Transitional HRA
 - **Transitional HRA Type:** Choose appropriate type
 - **HRA method:** choose appropriate method
 - Complete remaining assessment information elements and completion requirements. Submit assessment until status is "Completed."
 - Do NOT enter THRA activity in MMIS. MnCHOICES THRA activity replaces MMIS entry.

Additional Tasks for THRA Processes

- Add member to the Monthly Activity Log as appropriate (see additional detail in section below)
- Set reminder(s) to obtain signature page (as needed)
 - **NOTE:** Required if not received with transfer documents or after the first attempt made by new CC
- Set reminder to complete re-assessment within 365 days of previous assessment
 - **NOTE:** The THRA does not reset the reassessment timeline schedule. When a THRA is completed or attempted at the time of a product change, the following assessment is completed based on existing timelines and is considered the INITIAL assessment on the current product with a new enrollment span. If that initial assessment results in a UTR or refusal, the following reassessment timelines are calculated based on the new enrollment date for the first reassessment. See the Assessment Timelines Job Aid for additional details.

- A new THRA form is required for each transfer/product change

THRA Entry on the Monthly Activity Log (MAL):

Scenario	Document on MAL	Do NOT Document on MAL
THRA is successfully completed.		<input checked="" type="checkbox"/>
Connect + Medicare Member is unable to be reached for THRA	<input checked="" type="checkbox"/>	
Member refused THRA.		<input checked="" type="checkbox"/>

Entering data on the MAL when the member is unable to be reached for the THRA:

- **Activity Completion Date:** Date of last contact attempt
- **HS Code:** HP (code from last assessment)
- **Type of Activity:** THRA Attempted: UTR

Additional Resources:

Assessment Checklists
Monthly Activity Log Job Aid
Requirements Grids
Assessment Timelines