

# Instructions for Completing Member / Claims Transfer

## I. Enrollment/Membership Transfer Communication Protocol

- A. There will be times in which a county (County "A") is in need of taking over membership rights from another county (County "B"). As having gone over in the Enrollment Users Group, once County "A" has determined that a client is now a resident of their county, County "A" can assume responsibility for that client. County "A" can terminate the current client record from County "B" and then appropriately reinstate into their county and plan.
- B. Finally, and most importantly, County "A" must then properly notify County "B" that they have assumed membership responsibility for the client. Once County "B" receives notification from County "A", it is important that their Enrollment Staff notify the Claims Staff of this transaction.
- C. NOTE: During this initial UCI notification process, it is important that County "A" instruct County "B" if they prefer to have an potential outstanding claims they will be receiving from County "B" placed on hold. Otherwise, all boards can assume that once they refresh and adjudicate the claim for the other board involved, they DO NOT have to place claims involved on hold. (This corresponds to step II B detailed below.)

## II. Appropriate Handling of Claims

- A. Upon notification of client transfer, the Claims Staff of County "B" should check claims history through PSDSP for any claims incurred from timeframe of transfer to present. If claims have been paid (in the claims processing status of finalized "F" or Paid "P"), then a manual invoice can be created billing County "A".
- B. However, while checking PSDSP, should you find that claims are not paid (in the claims processing status of "U"), then the claims can be switched over for County "A" to pay.  
Appropriate action to take:
  1. Pull a listing or screenshot from PSDSP as to the claims involved.
  2. In OPCLM, pull up claim(s) up involved and refresh the claim header (F6 function key and option F to refresh the membership eligibility). After refreshing the claims header, you will notice that the membership will change from your County group and plan to County A's group and plan.
  3. Next, go to end of claim and enter "A" to adjudicate the claim. Once in the claims detail, pull up line 001. Next, you should re-price and re-adjudicate the claims detail (F6 function key and option B to both price and adjudicate). Once completing, you will notice that the claim will then price and adjudicate according to County A's benefit package. Next, enter to end and update the claims detail. If requested, place claim on hold for County A.
  4. Finally, hit home and enter to bottom of claims header screen and change from your security code to County A's security code. Enter "S" to save changes. This claim will then become the responsibility of County A.
- C. Finally, County B should then notify County A that claims have been switched over to their security code. This will help County A to review claims for appropriate adjudication prior to APUPD.

## III. Claims Security Issues

If there is not proper enrollment notification and claims handling, there are potential claims problems that will be incurred by both Boards involved in the UCI transfer situation:

- A. Just security code placed on claims-no other action taken:
  - Claims header and detail problem incurred if only a new security code is attached and then claim is taken through APUPD. Security code will be of one county "A" with all other detail belonging to other county "B".
- B. Claim header refreshed but detail is not re-priced and adjudicated:
  - Claims header (Company Code and Plan) mismatch with claims detail if detail is not re-priced and adjudicated to new plan information. (Header will be for County A, but detail remains for County B.)