Transfer Procedure for New Mexico

1. Case Managers are required to complete the change form and then SComm the form to Angela Otero, Mark Friedland and Jennifer Thorne-Lehman.

2. Angela Otero, Mark Friedland and Jennifer Thorne-Lehman will ‘Reply All’ when they have received the change form thereby notifying everyone that they will be taking responsibility for the transfer and avoid duplication of transfers. They will then send the Individual for Referral to the New Provider so that the New Provider can admit the Individual from their ‘Pending’ status.

3. The Case Manager will create PDF’s or Export to Excel the following documents from the old Provider account:

Document Name	PDF Format	Excel Format
Individual Data	✓	
Diagnosis	✓	
Allergies	✓	
Medication History		✓
Medication Administration Assessment Tool (MAAT)	✓	
Aspiration Risk Screening Tool	✓	
Comprehensive Health Assessment (e-CHAT)	✓	
e-CHAT Summary Report	✓	
1 year of Appointments via Search with the status as ‘Approved’		✓
1 year of Future Appointments via Search with the status as ‘In Prep’		✓

Case Manager will then send all the documents as attachments via Secure Communication within Therap to the New Provider.

4. The New Provider will then need to download all attached documents from their Secure Communications module.

- Admit the Individual in ‘Pending’ Status in the Administrative account
- Login to the User account and manually enter the following documents in the corresponding areas according to the information:
    - Individual Data
    - Diagnosis
    - Advanced Directives
    - Allergies
    - Medication Histories
    - Medication Administration Assessment Tool (MAAT)
    - Aspiration Risk Screening Tool
    - Comprehensive Health Assessment (e-CHAT)
    - e-CHAT Summary Report
    - Health Passport
    - Historical Appointments from past year
    - Future Appointments (Save, do not Submit)

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