

How to Enter a CDDP Transfer on the DD Eligibility Add Page

eXPRS allows CDDPs to directly enter intake and DD eligibility information for an individual by using the **DD Eligibility Add** page¹. This guide contains instructions on entering DD Eligibility when an individual is transferring CDDPs (known as a **CDDP Transfer**).

When an individual is transferring their case management services from one CDDP to another CDDP, there are many tasks that are completed outside of eXPRS². In general, there are specific tasks in eXPRS for both the Sending and Receiving CDDP.

General Outline of eXPRS Actions Needed Prior to Transfer:

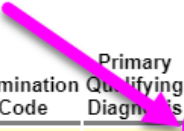
- I. **Sending CDDP** - End all Service Prior Authorizations (SPAs) and the Plan of Care
- II. **Sending CDDP** - End all other service Client Prior Authorizations (e.g. SE51)
- III. **Sending CDDP** - End SE48 CM CPA and other CM CPAs (as needed)
- IV. **Receiving CDDP** - Create SE48 CM CPA and other CM CPAs (as needed)
- V. **Receiving CDDP** - Create Plan of Care and SPAs
- VI. **Receiving CDDP** - Create other service CPAs

Once the sending and receiving CDDPs complete their tasks, the receiving CDDP can follow the steps below to update DD Eligibility. To do the work in the guide, the user must have one of the following roles:

- **CDDP Eligibility Specialist**
- **CDDP Eligibility Specialist Processor**
- **CDDP Eligibility Termination Processor**

How to Enter a CDDP Transfer on the DD Eligibility Add Page:

- 1) Login and search for the individual's record using the **View Client** page³ and select the **DD Eligibility > Edit** button for the eligibility line created by the sending CDDP.

▼ DD Eligibility								
Initial Eligibility Date: 6/13/1983								
Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code	Primary Qualifying Diagnosis	
3029		Completed	Approved	5/27/2010	12/31/9999		ID1	 <input type="button" value="Edit"/>

¹ For more information, see the guide: **Overview of the DD Eligibility Add Page**

² For information on the various types of transfers, as well as Worker Guides and other resources, see the [DD Case Management Tools Webpage](#), the [eXPRS Tasks for Client CME Transfers](#) guide, and the [CME Pro-Tip – How Case Management CPAs Affect the Plan of Care](#) guide.

³ For steps, see the guide and video: [How to use the View Client Page in eXPRS](#)

- 2) On the DD Eligibility page, take the following steps and then select **Save**:
- Adjust the **Termination Date** to one day prior to the receiving CDDP's open date.
 - Set the **Termination Code** to **Other**.

DD Eligibility Edit

Client Name: Adult Adu Client Prime: adu0000a
 Client Birthdate: mm/dd/yyyy Initial Eligibility Date: 06/03/2021

Determination CDDP: 3129 Intake Date: 1/20/2021 Intake Status: Completed Determination Status: Approved
 Notice Date: 6/3/2021 Termination Date: 5/15/2022 Termination Code: Other

- 3) Select the **DD Eligibility > Add** Button to create a new eligibility line.

Aliases

DD Eligibility

Initial Eligibility Date: 6/3/2021

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code		
# #	1/20/2021	Completed	Approved	6/3/2021	5/15/2022	OTH	Edit	View Details

Add

- 4) On the **DD Eligibility Add** page, enter the following information:

1. **Intake Date:** Leave this field blank.
2. **Determination Status:** Select **Transfer** to indicate a CDDP Transfer
3. **Notice Date:** The date the Transfer Memo notice was sent to the individual and/or their guardian informing them that their DD Eligibility is open in the new county.

DD Eligibility Add

Client Name: Adu Adult Client Prime: adu0000a
 Client Birthdate: mm/dd/yyyy Initial Eligibility Date: 05/16/2022

Determination CDDP: ### Intake Date: Intake Status: Select... Determination Status: Select...
 Notice Date: 05/16/2022 Termination Date: 12/31/9999 Termination Code:

Notes:

Transfer

- 5) Complete the rest of the **DD Eligibility Add** page for the individual. The information entered will likely be the same as was entered on the Sending CDDP's eligibility line. For more information, see the guides:

- **How to Enter Early Childhood DD Eligibility**
- **How to Enter School Age DD Eligibility**
- **How to Enter Adult DD Eligibility**

- 6) You will be returned to the individual's record and can see the new eligibility Line.

DD Eligibility

Initial Eligibility Date: 6/11/1986

Determination CDDP	Intake Date	Intake Status	Determination Status	Notice Date	Termination Date	Termination Code		
3029		Completed	Transfer	5/22/2023	12/31/9999		Edit	View Details
3029		Completed	Approved	6/11/1986	5/15/2022	OTH	Edit	View Details