How to Transfer Between Programs

For Case Managers
of the Ohio PASSPORT, MyCare, and HomeCare Programs

Last Updated: September 9, 2024

About This Guide

Here are instructions for Case Managers to follow when an individual needs to transfer between Ohio community care programs.

Contents

Overview

Transferring between programs involves two tasks:

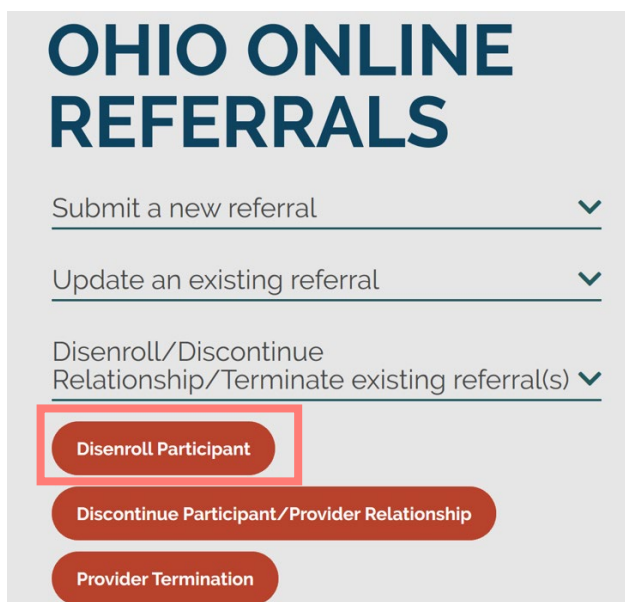| Disenroll from current system	→	Re-enroll in new system

Refer to the appropriate section, depending on which program your Participant is moving from and to.

Transfer from PASSPORT to MyCare or HomeCare

Disenroll Using Online Enrollment Tool:

1. Contact the Participant and ask:
   - What is the last date of service?
   - Are all the timesheets submitted?

2. One or two days after the last timesheet is submitted, log in to the Online Enrollment tool and select the Participant profile.

3. Under the Participant's profile, locate their **Employment Identification Number (EIN)** and write it down.

   You will enter this number in the new referral.

4. Open the **Time Entries** for each of the Participant's Providers and confirm that their last timesheet entry is in *Good to Pay* status.

   If any timesheets are still in process, wait before continuing these steps.

5. Return to the home page and select the **Disenroll Participant** option.

OHIO ONLINE REFERRALS

Submit a new referral ⌄

Update an existing referral ⌄

Disenroll/Discontinue Relationship/Terminate existing referral(s) ⌄

Disenroll Participant

Discontinue Participant/Provider Relationship

Provider Termination

6. Complete the **Participant Information** section.

   For the **Disenrollment Date**, enter the last day that service was provided.

7. Complete the **Case Manager Information** section and select **Finish**.

8. Write down the reference number for this request in case you need to reference it with PPL staff.

9. Immediately continue with the following re-enrollment steps.

   Tip: Leave your browser open so you can refer back to the Participant's information.

   Note: After 1-2 days, you can confirm that the disenrollment is complete by opening the Authorization tab and verifying it is ended.

Re-enroll in MyAccount:

1. Log in to MyAccount (account.pplfirst.com).

   Tip: Use a separate browser tab so you can refer to the PASSPORT profile.

2. Create a new referral using the existing EIN and other information from the PASSPORT profile.

   Tip: By providing the existing EIN, you will alert PPL to the Participant's prior enrollment.

   Here are the standard steps for creating a referral:

   - Select the **Enrollment Dashboard**.
   - Select **Create a new referral**.
   - On the Referral page, select your state program and choose **Create referral**.
   - Complete the prompts using the information from the PASSPORT profile.

3. Expect the PPL Enrollment team to do the following:

   - Follow the standard enrollment process and welcome call.
   - Transfer some completed items like criminal background checks.
   - Enroll all Providers for this Participant.
   - Ask you to provide a new authorization.

Transfer from MyCare or HomeCare to PASSPORT

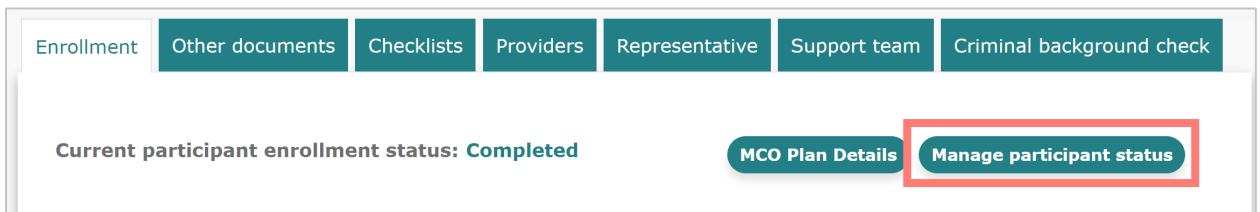**Disenroll from MyAccount:**

1. Contact the Participant and ask:
   - What is the last date of service?
   - Are all the timesheets submitted?

2. One or two days after the last timesheet is submitted, log in to MyAccount (account.pplfirst.com) and search for the Participant profile under the **Enrollment Dashboard**.

3. In the search results, select **View Details**.

4. Under the **Enrollment** tab, select **View EOR details** and write down their **EIN** (Employment Identification Number).

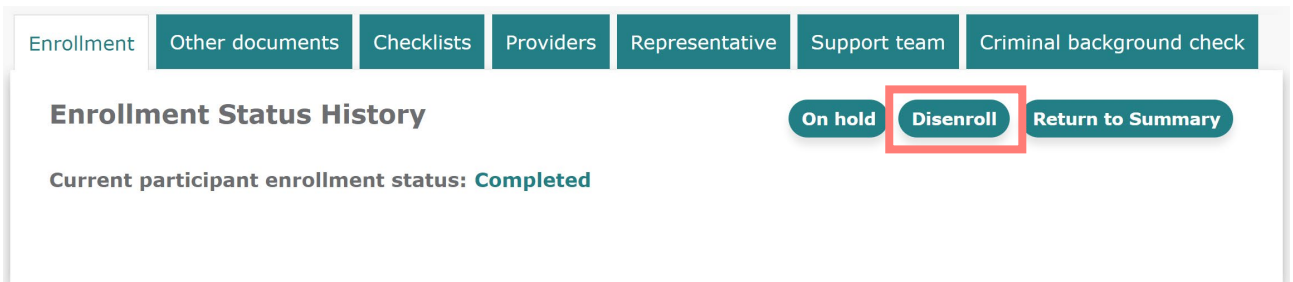   You will enter this number in the new referral.

5. Under **Providers** tab, open each of the Participant's Providers to confirm their timesheets are completed:
   - From the Provider's details, select **Manage this user**.
   - On the Provider's Dashboard, select **Time Entries and Earnings**.
   - Under the **Time Entry** tab, scroll down to the list of timesheets and verify the last timesheet entry is in *Good to Pay* status.

   Note: If any timesheets are still in process, wait before continuing these steps.

6. Under the **Enrollment** tab, select **Manage participant status**.

Enrollment	Other documents	Checklists	Providers	Representative	Support team	Criminal background check

Current participant enrollment status: **Completed**   (MCO Plan Details) (**Manage participant status**)

7. Select **Disenroll**.

Enrollment	Other documents	Checklists	Providers	Representative	Support team	Criminal background check

Enrollment Status History   (On hold) (Disenroll) (Return to Summary)

Current participant enrollment status: **Completed**

8. For the **Effective date of disenrollment**, enter the last day that service was provided.

> **Enrollment Status History**   Return to Summary
>
> **Current participant enrollment status: Completed**
>
> *In order to change the enrollment status to Disenrolled, you must enter the following information*
>
> Effective date of disenrollment:* | 3/31/2024
>
> Disenrollment reason:* | Other ▾
>
> The service needs will be better met by another program
>
> Save   Cancel

9. Select a **Disenrollment reason**, enter any additional description, and select **Save**.

10. Immediately continue with the following re-enrollment steps.

   Tip: Leave your browser open so you can refer to the Participant's information.

   Note: After 1-2 days, you can confirm that the disenrollment is complete by opening the Authorization tab and verifying it is ended.

If needed: Reverse the Disenrollment

Follow these steps if you need to cancel the transfer and restore the Participant's profile.
Note: This feature is only available for 30 days after disenrolling.

1. Log in to MyAccount and open the **Enrollment Dashboard**.

2. Search for the Participant profile and select **View Details**.

3. Under the **Enrollment** tab, select **Manage participant status**.

4. Select **Re-enroll** and **Confirm** to restore the Participant to active status.

Re-enroll Using Online Enrollment Tool:

1. Log in to the Online Enrollment tool and select the Participant profile.

   Tip: Use a separate browser tab so you can refer to the prior profile.

2. Create a new referral using the existing EIN and other information from the prior profile.

   Tip: By providing the existing EIN, you will alert PPL to the Participant's prior enrollment.

3. Expect the PPL Enrollment team to do the following:

   o Follow the standard enrollment process and welcome call.

   o Transfer some completed items like criminal background checks.

   o Enroll all Providers for this Participant.

   o Ask you to provide a new authorization.