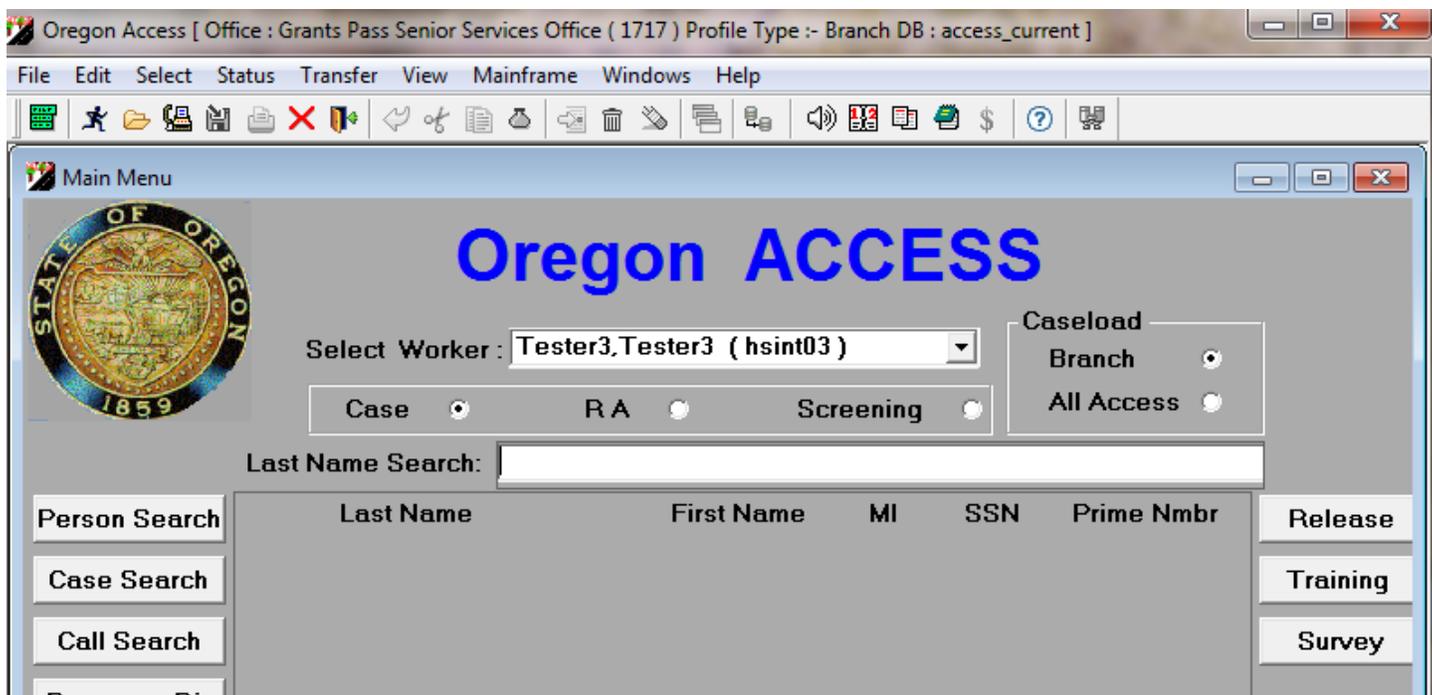


Oregon DHS

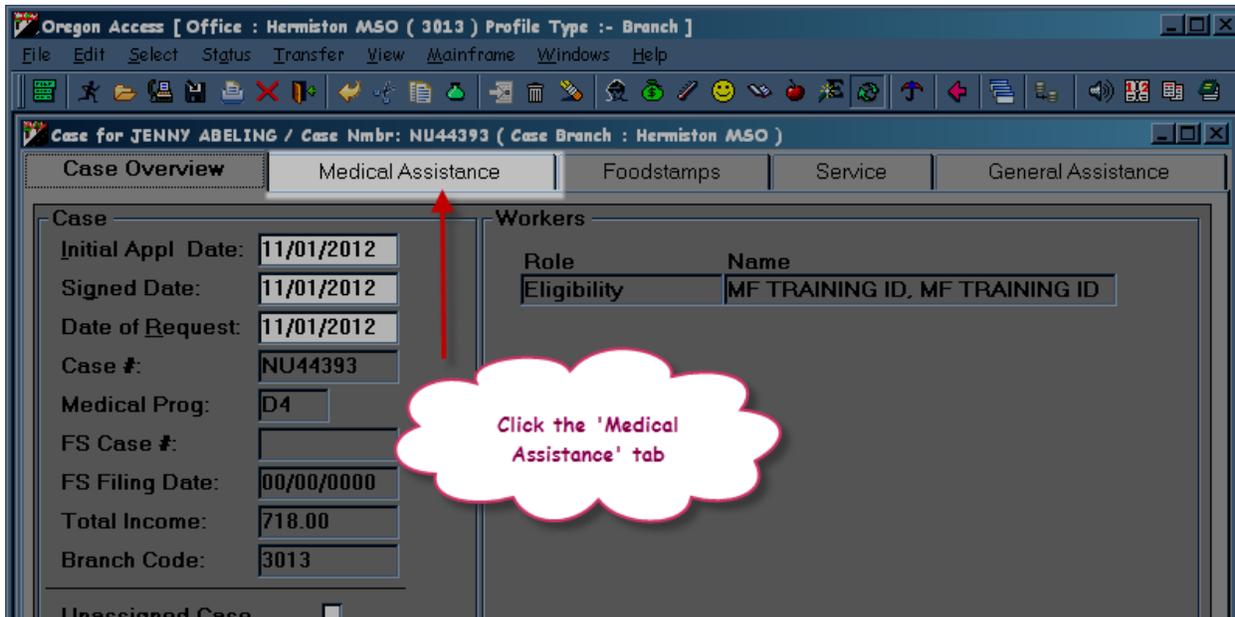
Transferring Cases in Oregon ACCESS

Mainframe Integration



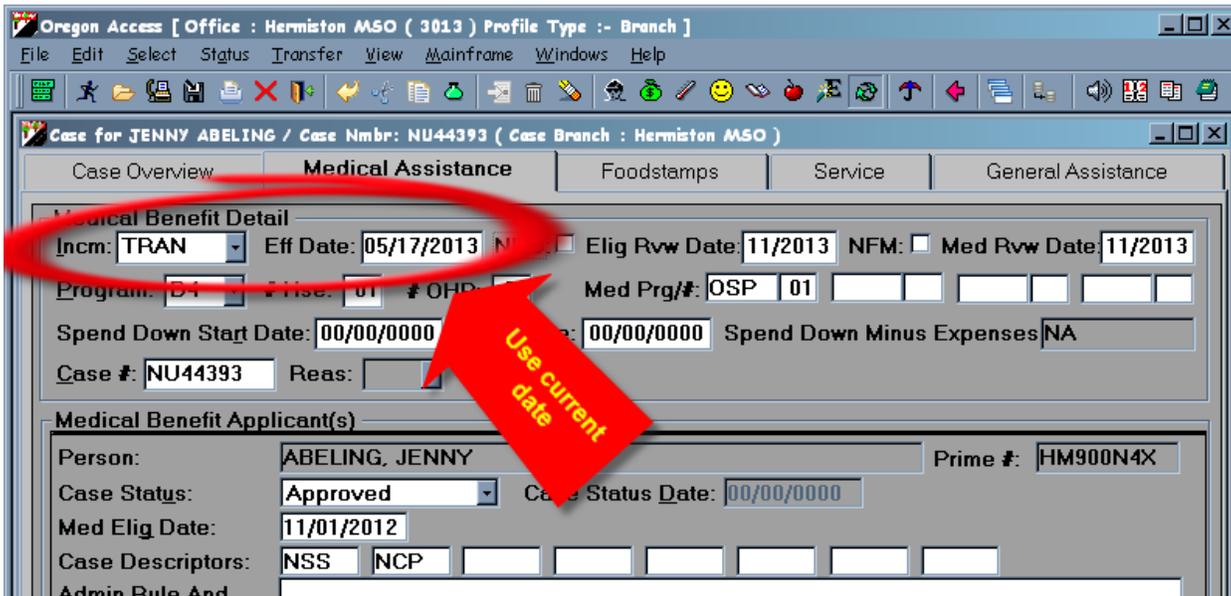
Williams Heather D
10/11/2016

3. Click on the **Medical Assistance** tab.

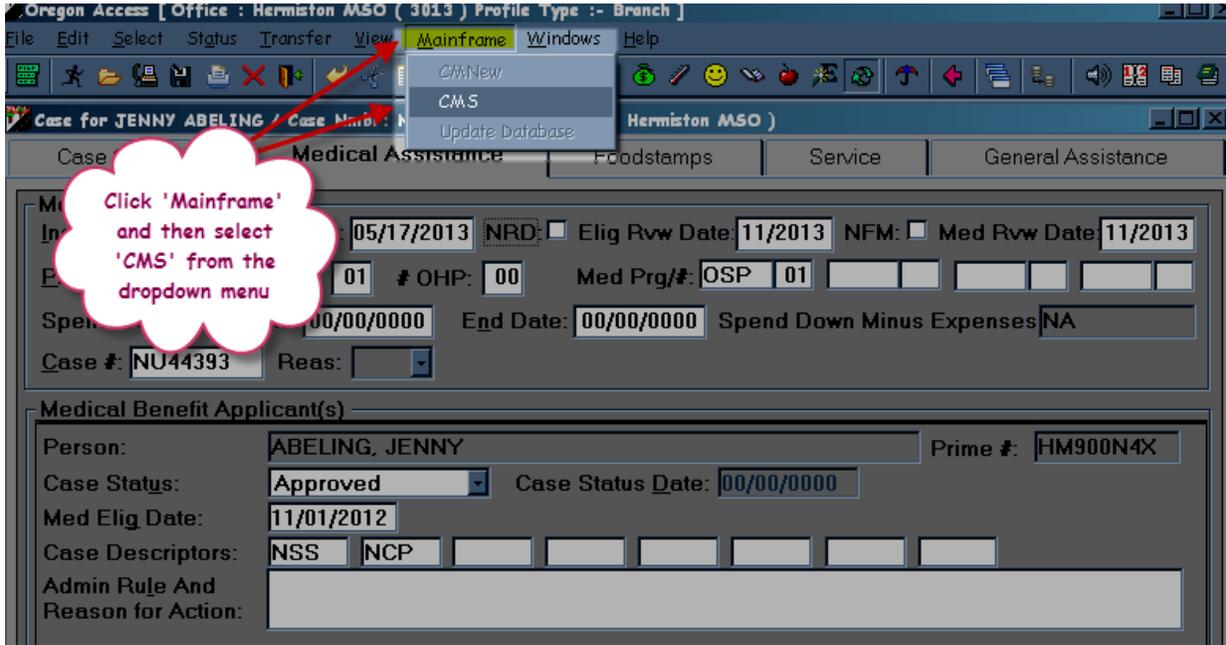


4. In the **Incm** field drop-down menu, select **TRAN**.

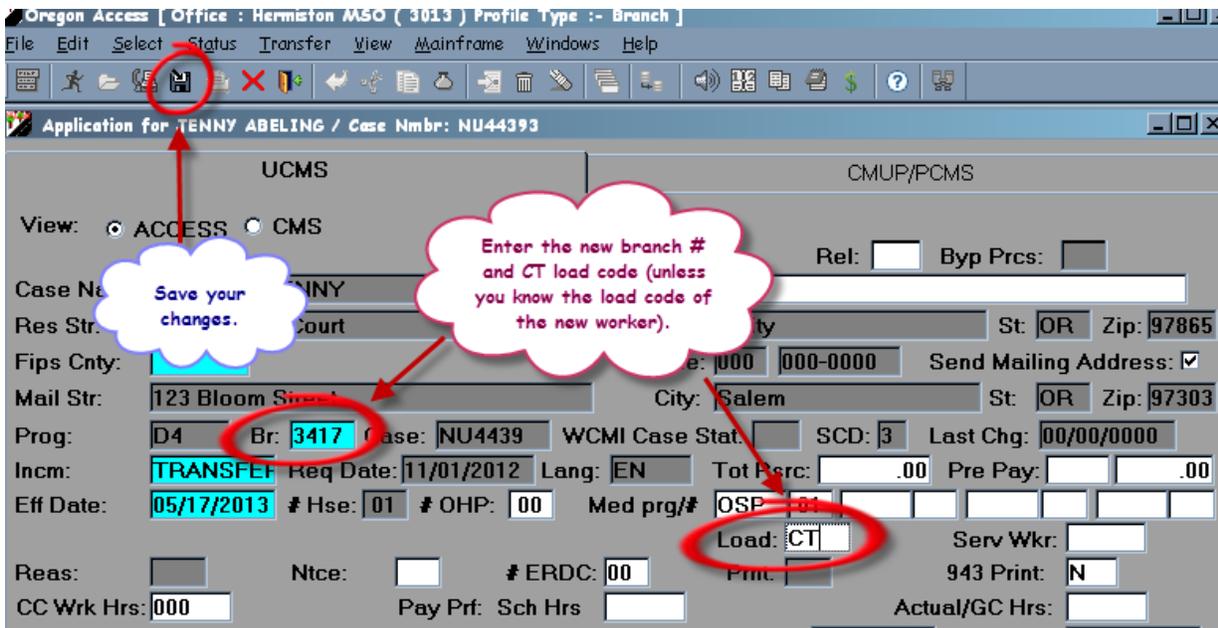
5. In the **Eff Date** field, enter the current date.



- Click **Mainframe** from the File menu.
- Select **CMS** from the drop-down menu (it should be the only available choice).



- In the **Br** field, delete the current branch and enter the new branch number.
- In the **Load** field, enter the load code of the new worker (if known); otherwise, enter **CT** for (Case Transfer).
- When you are finished, click the **Save** icon 



- If you receive the following message, you have successfully transferred the CMS case. Don't forget to narrate before transferring the ACCESS case!

SCMS for JENNY ABELING / Case Nbr: NU44393

Case Status: #HPN - Prem: #Med Std:

HIP Need: HIP Chk:

Case Desc	Pgm Status	Adult Recip	CH
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Std Need	Spl Need	Oth Need	Tot Need	Tot Adj Income	Ovr Rec	Ben Amount	Cr Deb	Ben Chk Amt
<input type="text"/>								
<input type="text"/>								

Earn Rpt	Cntbl Earn	Tot Ded	Ac Ea
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

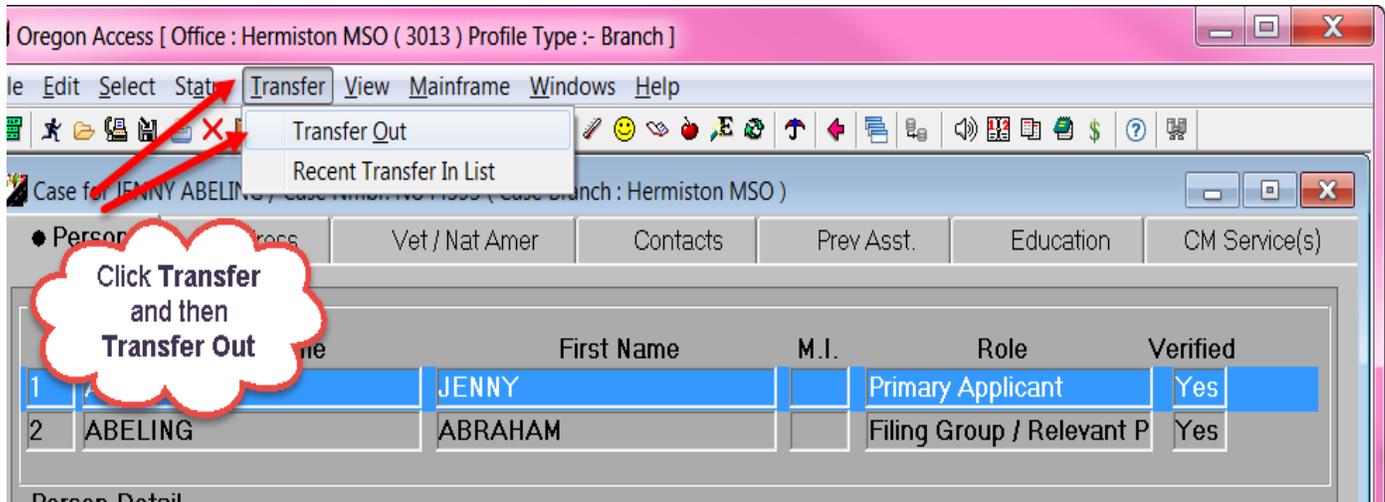
INFORMATION X

B6 EBT CASE INFORMATION SUCCESSFULLY UPDATED

This is what you want to see!

Transferring the Oregon ACCESS Case

After you integrate the transfer and narrate, you are ready to transfer the ACCESS case. Click **Transfer** and select **Transfer Out**:



The transfer window will appear. If there is a screening or resource assessment in the individual's name, it will be selected for transfer. If for some reason, you do not wish to transfer the other components, click to de-select.

Oregon Access [Office : Hermiston MSO (3013) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for JENNY ABELING / Case Nbr: NU44393 (Case Branch : Hermiston MSO)

Transfer Out

Case / RA / Screen Name	Type
ABELING , JENNY	Case
ABELING , JENNY	Resource Assessment
ABELING , JENNY	Screening

City	Description	Branch Code
Warrenton	Warre	0411
Albany	OCW	2211
Baker	Bake	0112
Baker City	Bak	0111

Branch Types: QAA Branches Regular Branches

Cancel

All of the individual's components will be selected for transfer. If you don't wish to transfer all of them, click to de-select.

Scroll to find the receiving branch, click to select, and then click **Transfer**:

Oregon Access [Office : Hermiston MSO (3013) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Case for JENNY ABELING / Case Nnbr: NU44393 (Case Branch : Hermiston MSO)

Transfer Out

Case / RA / Screen Name	Type
ABELING , JENNY	Case
ABELING , JENNY	Resource Assessment
ABELING , JENNY	Screening

City	Branch Description	Branch Code
Baker City	Baker City SPD	0111
Beaverton	Beaverton SPD	3417
Bend	Dept. of Human Services	0911
Burns	Burns OPI	1312

Branch Types: QAA Branches Regular Branches

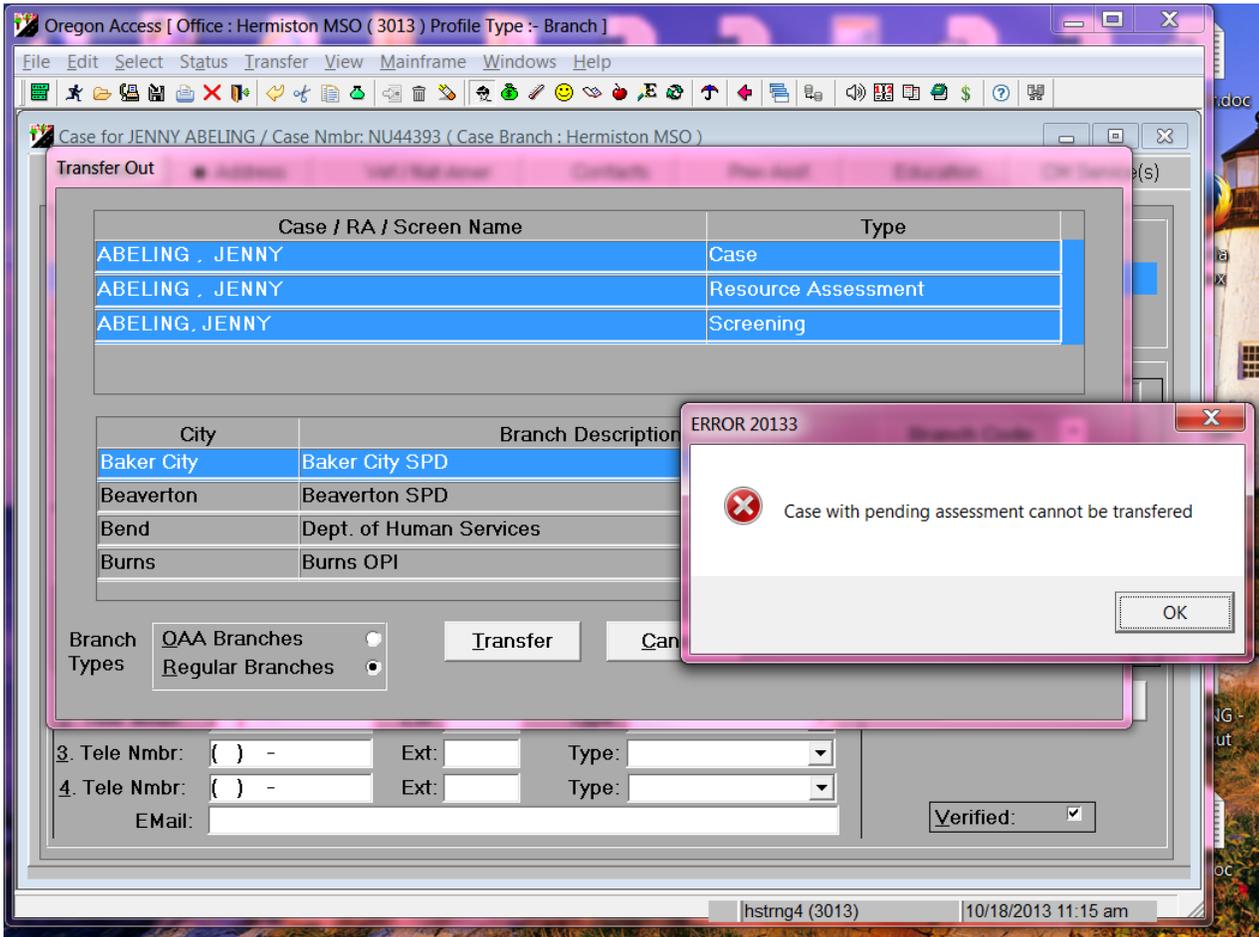
3. Tele Nnbr: () - Ext: Type:

4. Tele Nnbr: () - Ext: Type:

Email:

Scroll down to find the receiving branch, click to select, and then click Transfer

Make sure to read any error messages carefully. A case with a pending assessment, service benefit, or service benefit cannot be transferred. Also, you cannot transfer a case with custom ticklers – these must be deleted first.



Indicate whether or not you wish to print the SDS 905/905A – this should be mailed to the client.

Oregon Access [Office : Hermiston MSO (3013) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Main Menu

Transfer Out

SDS 905/905A

Print SDS 905/905A, Notification of Case Transfer form?

Yes No

		Type
		Case
		Branch Code
		0411
Albany	OCWCOG Linn/Benton County Senior Services	2211
Baker	Baker Help	0112
Baker City	Baker City SPD	0111

Branch Types: QAA Branches Regular Branches

Transfer Cancel

Narrative CHIMES IN -- FY40000T CM Alerts

hstrng4 (3013) 07/09/2015 10:24 am

If you click **Yes**, a window will appear on which you can indicate the reason for transfer and any additional notes. When you are done, click **OK** and the form will print.

Notification of Case Transfer Additional Information Capture

Destination Branch

City	Branch Description	Branch Code
Albany	OAA- OR Cascades West COG AAA	7410
Albany	OCWCOG Linn/Benton County Senior Services	2211
Baker	Baker Help	0112
Baker City	Baker City SPD	0111

AFS Offices

City	Office Desc	Branch Code
------	-------------	-------------

Reason for transfer

You are not eligible for a program that our office handles You have moved

You are now 65 years old Other (specify in Remarks)

Case update

Address updated Shelter updated

Address verified Shelter verified

Remarks

You have transferred the case successfully!

Oregon Access [Office : Hermiston MSO (3013) Profile Type :- Branch]

File Edit Select Status Transfer View Mainframe Windows Help

Main Menu

Transfer Out

INFORMATION



Transferred out Case Successfully

OK

		Type
		Case

	Branch Description	Branch Code
warrenton	warrenton Aging and Disability	0411
Albany	OCWCOG Linn/Benton County Senior Services	2211
Baker	Baker Help	0112
Baker City	Baker City SPD	0111

Branch Types: QAA Branches Regular Branches

Transfer Cancel

CHIMES IN -- FY40000T

Narrative CM Alerts

hstrng4 (3013) 07/09/2015 10:24 am