WV ADW Provider Portal: Transfer Requests

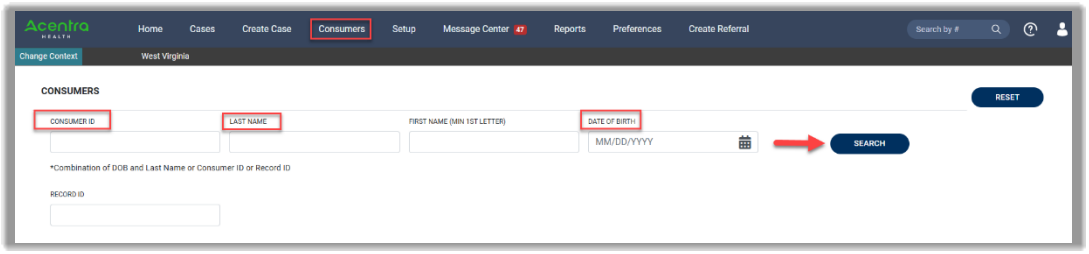
Job Aid Title: WV ADW Provider Portal: Transfer Requests	**Job Aid Number**: WV.ADW.ANG.JA.002
Date Published: 10/20/2025	**Approved by**: Melody Cottrell, Kim Sang
References: Provider Portal Assessment User Guide	
Purpose: To guide providers through the process of submitting a transfer request in the Atrezzo portal.	

Consumer Search

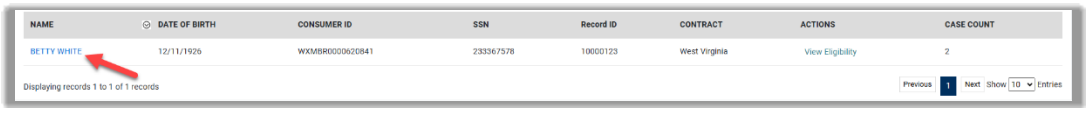
Click the Consumer tab

Enter the **Consumer ID, or combination of Last Name** and **Date of Birth**

Click **Search**

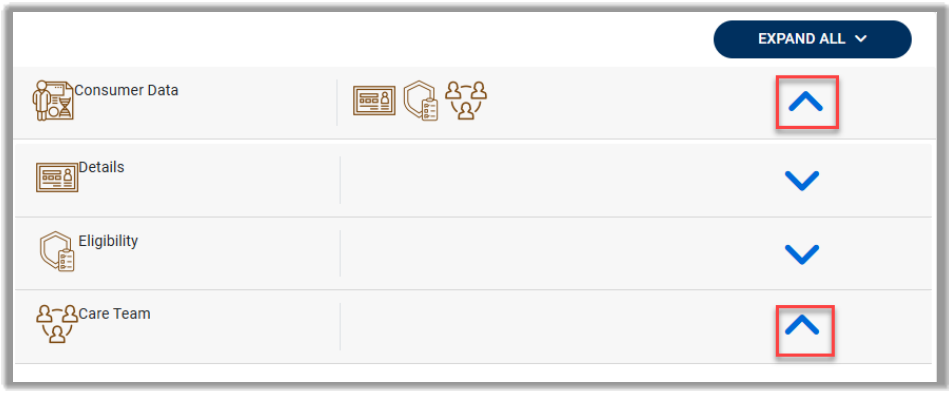


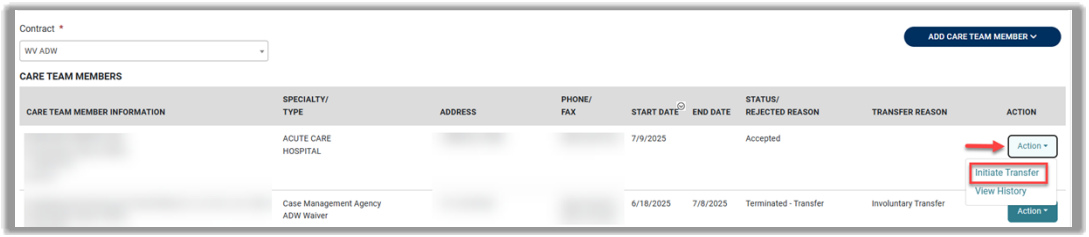
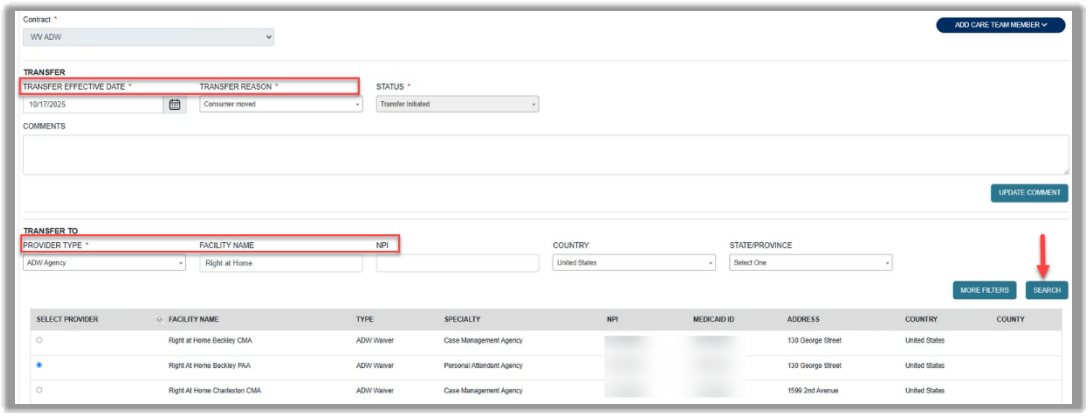
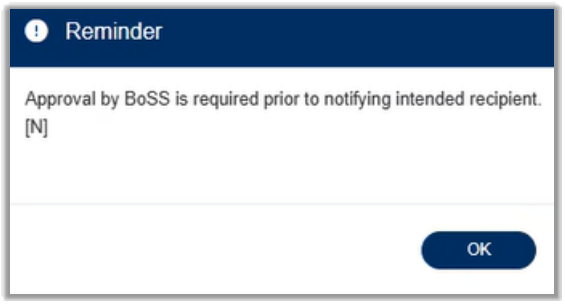
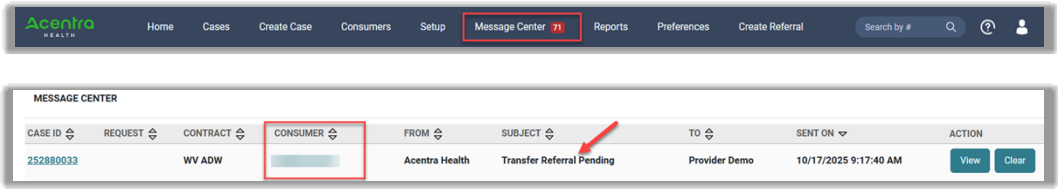
Click the Consumer's Name **Hyperlink**



Transfer Request

Expand **Consumer Data** > **Care Team**



Navigate to the agency you wish to initiate the transfer **FROM** in the list. Select the **Action** button, then click **Initiate Transfer**	
Enter the **Transfer Effective Date** and **Reason** Enter the Transfer recipient's **Provider Type** and search criteria, then click **Search** Select the appropriate radio button from the results and click **Submit**	
Note: *Boss will approve or reject the transfer. If **rejected**, the provider will be notified via the portal. If **approved**, the transfer recipient will receive a message to accept or reject the referral.*	
Once the transfer is pending BoSS approval, the status will display as **Transfer Approval Pending**	
BoSS Approval: Accept Transfer To access the consumer's dashboard, from the Message Center click the consumer's name directly from the message	

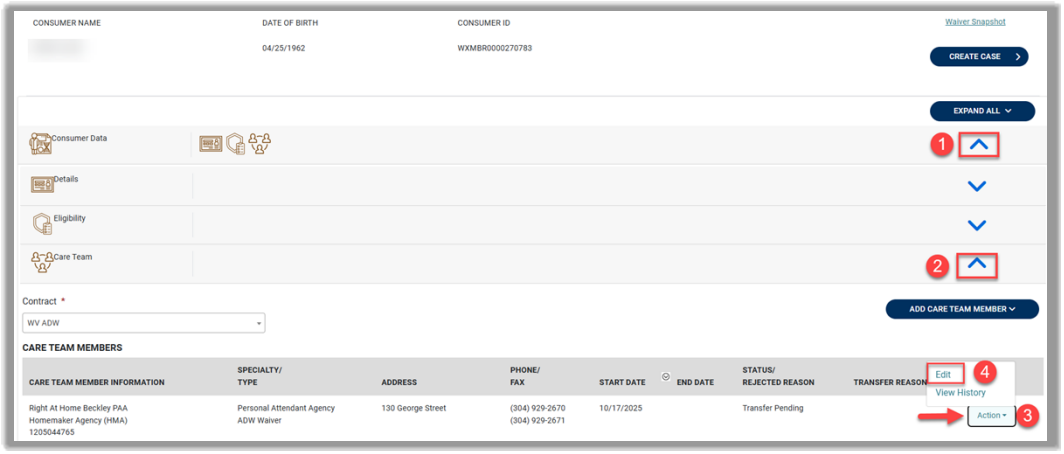
1) Expand **Consumer Data**

2) Expand **Care Team**

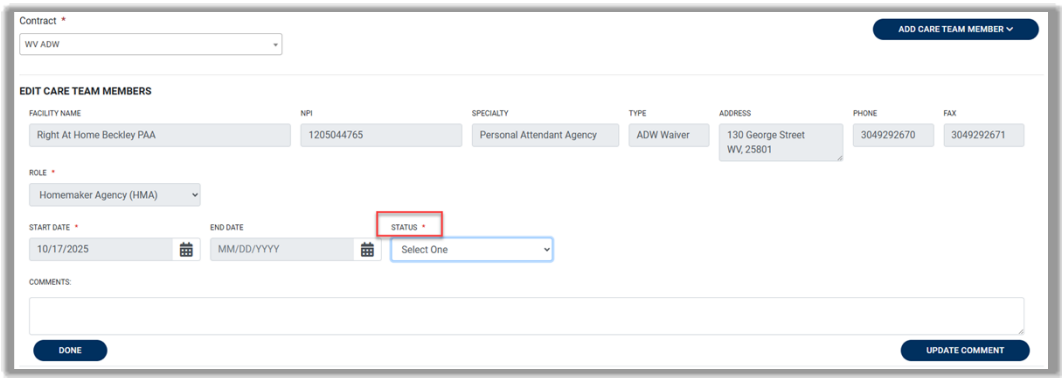
3) Click the **Action** Button

4) Click **Edit**

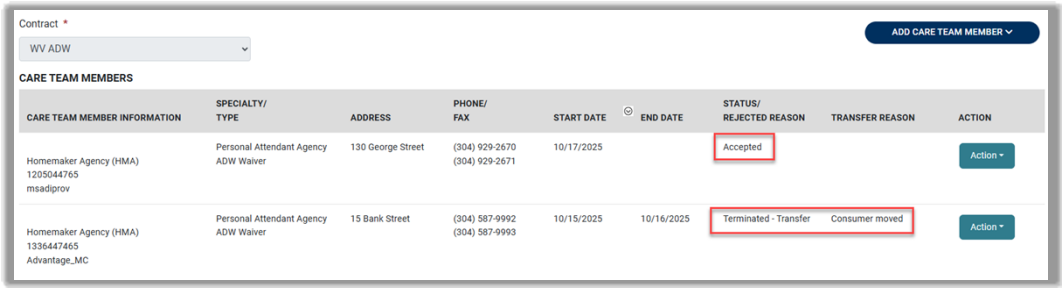
**Confirm the correct contract is populated*



Select the **Status** Dropdown to **accept** or **reject** the transfer



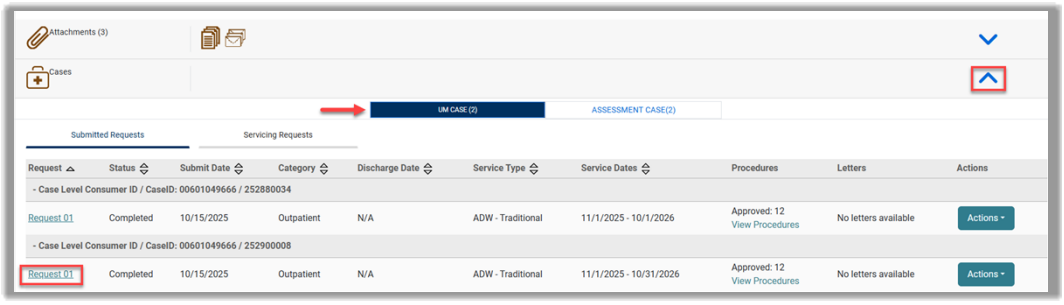
When a transfer is approved, the status will update from **Terminated** under the old agency to **Accepted** under the new agency. Be sure to monitor the status updates to confirm successful transition



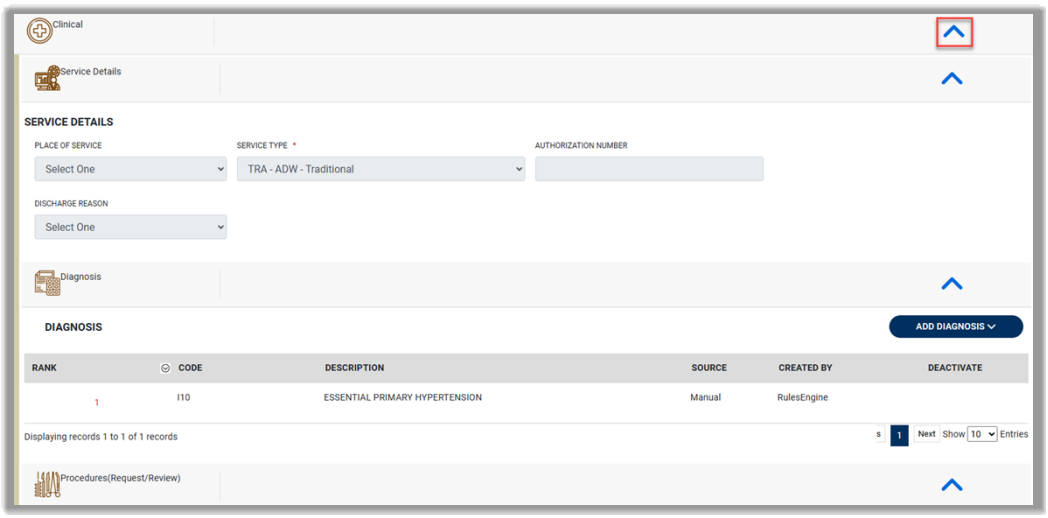
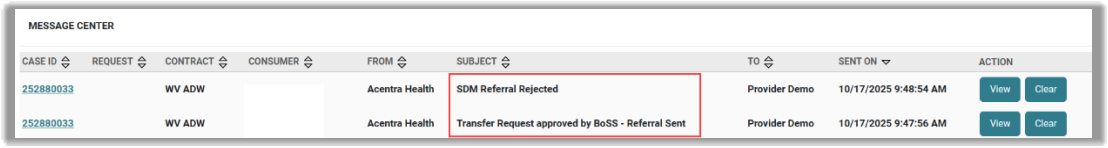
Locate updated authorization within the UM Case:

Expand **Cases** and select the **UM Case** tab

Click the applicable **Request number** to view the details



*Clicking the **View Procedures** link displays the procedure details. **Note:** The previous authorization will be rolled back as a result of the transfer. Any future authorizations will show as zero.*

After selecting the Request number: To view authorization numbers for a specific month, expand the **Clinical** section. Scroll down to view the corresponding auth numbers by month	
Message Portal: Rejection If the transfer recipient rejects the referral, the initiating provider will receive a notification message in the portal	

Version	Comments	Revision History	Date Updated
1	Job Aid Created	JMulbah	10/17/2025
1	Job Aid Approved	DBryan	10/20/2025