

# Transferring A Client (Program Transfer)

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## Overview

Individuals can be transferred between programs due to a change in Level of Care or transfer to a new facility/program. Transfers must be completed at the time of transfer or immediately after, **future dates/times are not permitted.**

**NOTE** - Charges will accrue normally and continue to be billed according to the incorrect program if the Transfer is not completed immediately.

If a client completely leaves a program and is not moving to another, a Discharge should be carried out instead of a Transfer. [Discharging A Client](#)

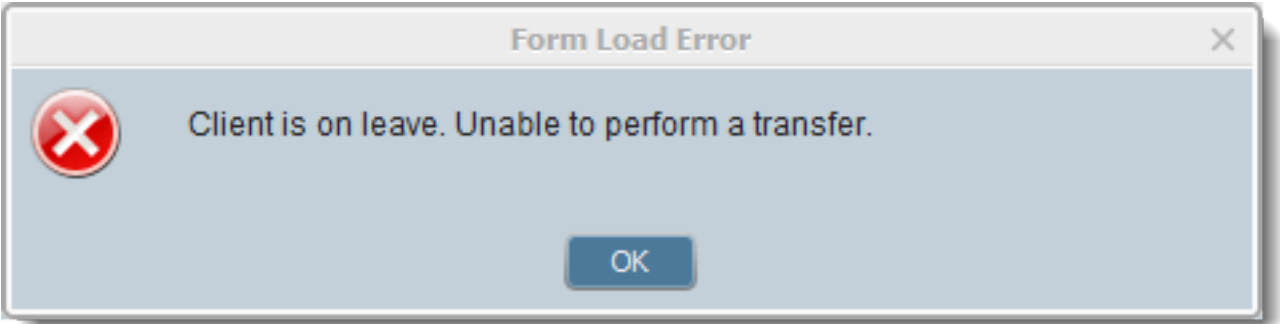
Transfers must be between similar programs, i.e. one residential program to another residential program. They cannot be from residential to non-residential, or vice versa.

## Applicable Staff

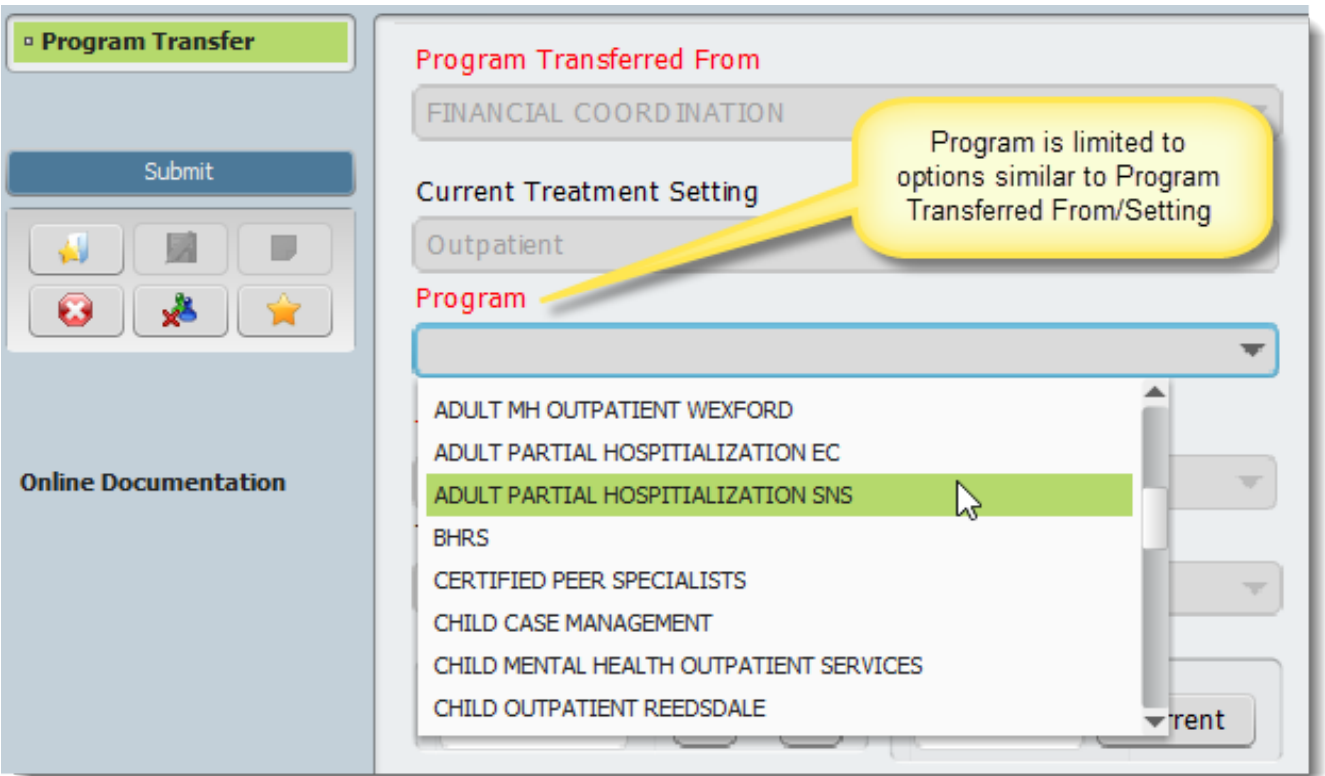
Supervisors and Directors are authorized to transfer individuals.

## Usage

The form is client and episode based and can be opened from the Home View, from a client's chart, or by following the menu path Avatar PM/Client Management/Episode Management/Program Transfer. If the following error appears when opening the form, please return the client from leave [Leaves](#) to complete the transfer:



When the form opens, the Program Transferred From and Current Treatment Setting will be filled in and cannot be changed. Choose a Program to transfer into, of the same type/setting. Options will be tailored to match the current program:



Depending on the type of program being transferred From/To, additional fields may be either unavailable or required. The first image is for Outpatient Programs, in which Unit, Room, and Bed are unavailable:

**Program Transfer**

Submit

Online Documentation

Options unavailable for Outpatient services

**Program Transferred From**  
FINANCIAL COORDINATION

**Current Treatment Setting**  
Outpatient

**Program**  
ADULT MH OUTPATIENT WEXFORD

**Treatment Setting**  
Outpatient

**Treatment Service**  
Adult Mental Health Outpatient Services

**Date Of Transfer**  
08/18/2016 T Y

**Time Of Transfer**  
12:24 PM Current

**Unit**  
[Empty]

**Room**  
[Empty]

**Bed**  
[Empty]

**Licensed/Unlicensed**  
[Empty]

**Time Of Bed Assignment**  
12:24 PM Current

**Room And Board Billing Code**  
[Empty]

**Admission Charge Code**  
[Empty]

**Daily Charge Code**  
[Empty]

**Partial Hospitalization Days**  
☐ All Days  
☐ All Week Days  
☐ Friday  
☐ Monday

**Partial Hospitalization Hours**  
[Empty]

**Partial Hospital Billing Code**  
[Empty]

**Partial Hospital Billing Code 2**  
[Empty]

The next image shows additional required fields for Inpatient/Residential program transfers:

**Program Transferred From**  
ADULT DAS

**Current Treatment Setting**  
Inpatient/Residential

**Program**  
CLA0004 - 3065 HARMENING AVE

**Treatment Setting**  
Inpatient/Residential

**Treatment Service**  
ID Residential Services

**Date Of Transfer**  
08/18/2016 T Y

**Time Of Transfer**  
12:43 PM Current

**Unit**  
CLA0004 - 3065 HARMENING AVE

**Room**  
1

**Bed**  
2

**Licensed/Unlicensed**  
Licensed

**Time Of Bed Assignment**  
12:43 PM Current

**Room And Board Billing Code**  
(796) RES. PRESENT

**Admission Charge Code**  
[Empty]

**Daily Charge Code**  
(797) MR INELIGIBLE PRESENT

**Partial Hospitalization Days**  
☐ All Days  
☐ All Week Days  
☐ Friday  
☐ Monday

**Partial Hospitalization Hours**  
[Empty]

**Partial Hospital Billing Code**  
[Empty]

**Partial Hospital Billing Code 2**  
[Empty]

Room & Board are based on program and should not be changed

When using residential programs, Unit, Room, and Bed become required

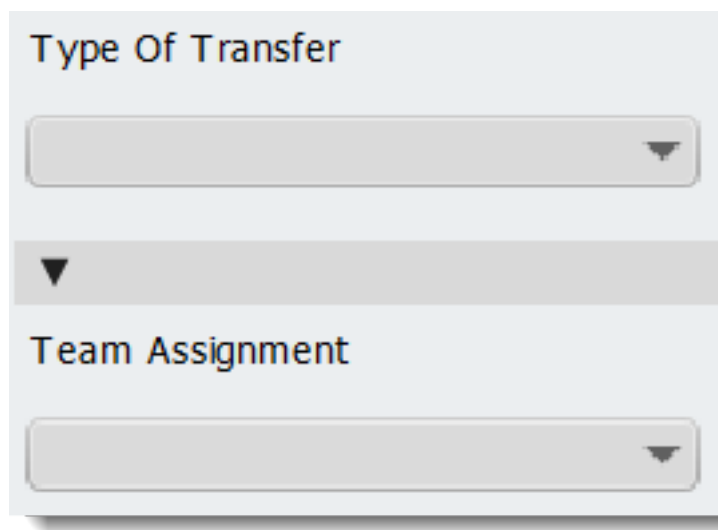
The left side of the form contains the required fields that dictate the new program to be assigned along with date and time information, etc. The right side of the form generally populates with information dependent on the selections made on the left.

The **Program Transferred From** (required) and **Current Treatment Setting** fields are pre-populated with the current program. The Program field is the program that the individual will be transferred to. Selecting a program automatically fills in Treatment Setting (required) and Treatment Service. The current Date and Time can be entered with the "T" and "Current" buttons, respectively, or t+/- number of

days. If the transfer has already happened, the correct information can be keyed in and the transfer will take place then. Future dates of transfer are not permitted.

**It is imperative that transfers be completed on the correct day before charges accrue. Corrections cannot be made after billing functions occur.**

The **Type of Transfer** and **Team Assignment** drop-downs will be populated by site and organization specific information depending on selections and are not required fields at this time.

A screenshot of a web form. At the top, the text 'Type Of Transfer' is displayed in a dark blue font. Below it is a light gray rectangular drop-down menu with a small black downward-pointing triangle on the right side. Below this menu is a horizontal separator bar with a small black downward-pointing triangle on the left side. Below the separator bar, the text 'Team Assignment' is displayed in a dark blue font. Below it is another light gray rectangular drop-down menu, identical in style to the first one, with a small black downward-pointing triangle on the right side.

Once all information is entered, click the blue **Submit** button and the record will be updated. The **Client Data Bar** will show the new program information where applicable.

## Tips & FAQ

Transfers are used to switch similar programs while keeping all information available and current. All other forms will be available in the new program (SEEP, Assessments, Notes, etc.).

Selections made in error (check box or drop down) can be cleared by selecting the desired information and pressing F5 on the keyboard.

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# Technical Information

Menu Location (Avatar PM/Client Management/Episode Management/Program Transfer)

SQL Table(s) - SYSTEM.history\_program\_transfer

SYSTEM.history\_partial\_hosp

SYSTEM.episode\_history

SYSTEM.view\_episode\_summary\_discharge

RAD Envelope (if applicable)

Related Forms and Reports (data from one form feeds another report/form) - Client Data Bar

Posted by: **John Cookson** - Tue, Feb 9, 2016 at 6:30 PM. This article has been viewed 2691 times.

Online URL: <https://www.mercykb.com/article.php?id=28>