

Transferring A Client (Program Transfer)

Article Number: 28 | Rating: Unrated | Last Updated: Thu, Aug 18, 2016 at 10:58 AM

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](#)

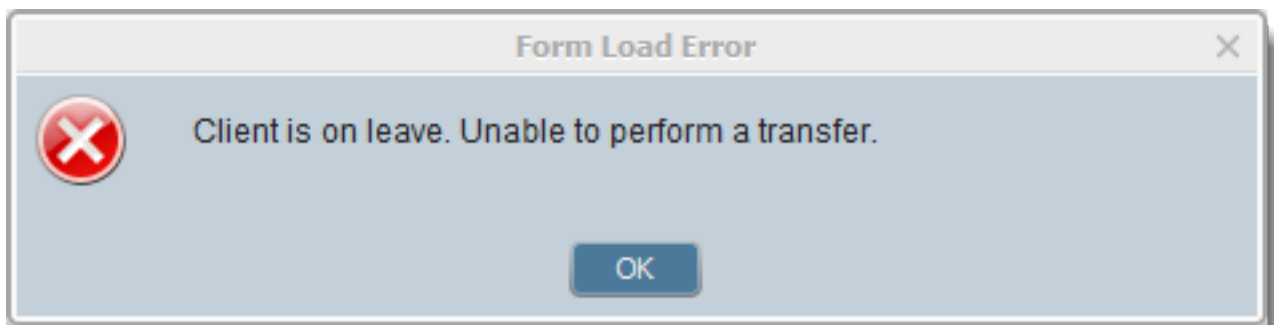
Transfers must be between similar programs, i.e. one residential program to another residential program. They cannot be from residential to non-residential, or vice versa.

Applicable Staff

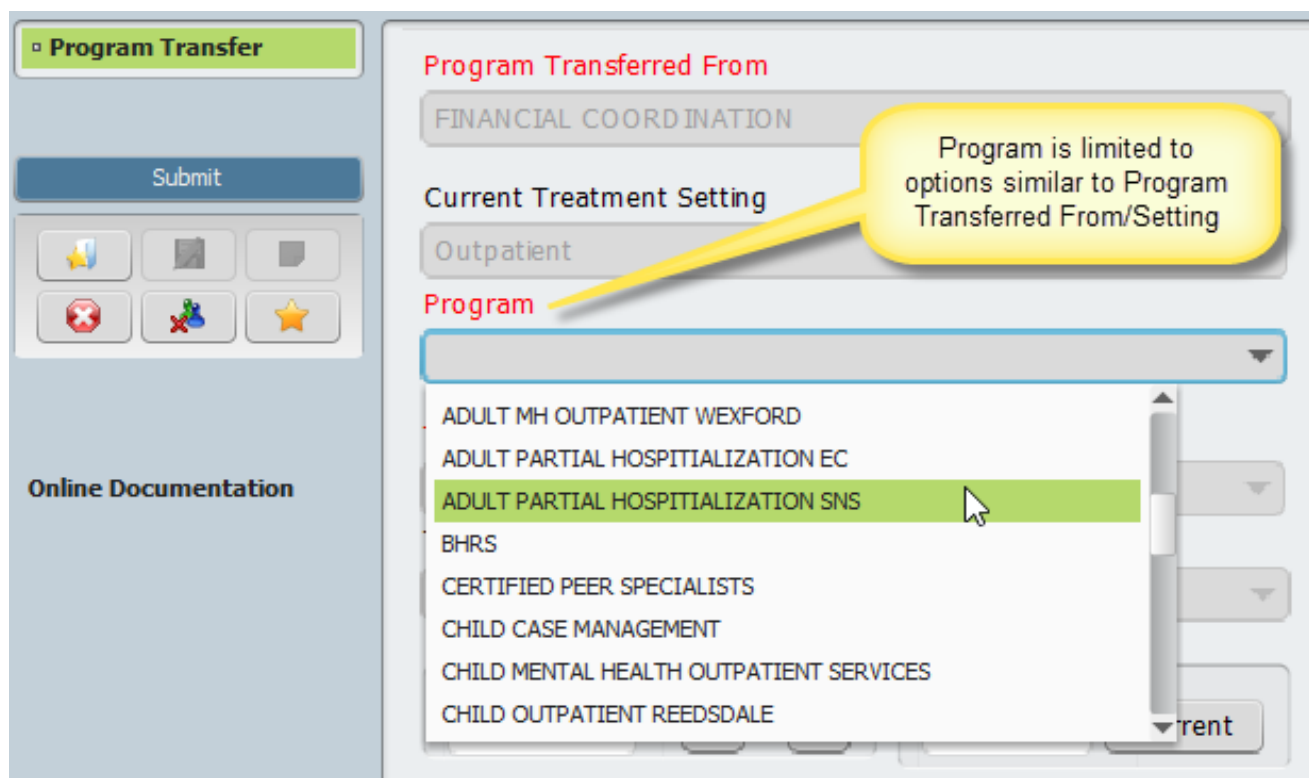
Supervisors and Directors are authorized to transfer individuals.

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:

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

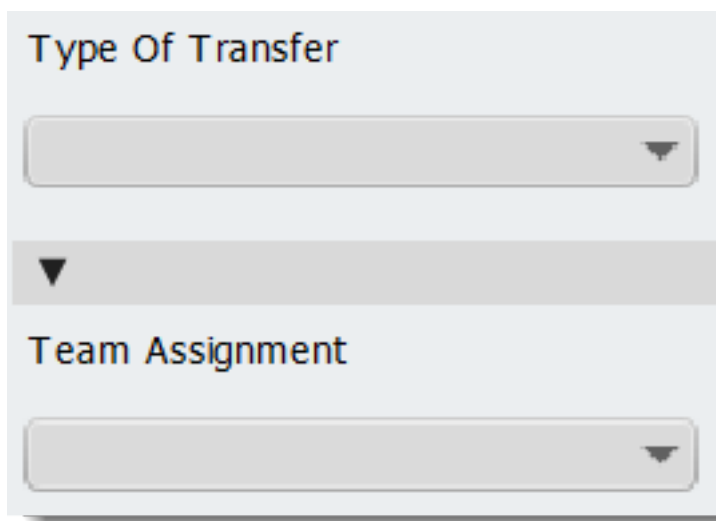
The left side of the form contains the required fields that dictate the new program to be assigned along with date and time information, etc. The right side of the form generally populates with information dependent on the selections made on the left.

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.



The image shows a screenshot of a web form with two dropdown menus. The first dropdown menu is titled "Type Of Transfer" and is currently empty. Below it is a second dropdown menu titled "Team Assignment", which is also empty. The form has a light gray background and a subtle shadow effect.

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.

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

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 3099 times.

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