**Transfer Patients Between Programs**

**Summary**

This User Guide will show the user the process of transferring patients from one program to another in the Client Data System (CDS).

<table>
<thead>
<tr>
<th>Step</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Welcome to the “Transferring a Patient Between Programs” User Guide. This User Guide will show you how to transfer a single patient or multiple patients in a single transaction. NOTE: These transfers can only occur between same-type programs within the same provider. The first step will be to search for the patient(s) you want to transfer. From the “CDS Home” page, first click the <strong>Transfer</strong> link to open the Transfer Search window.</td>
</tr>
</tbody>
</table>

![CDS Home](image)

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This brings you to the “Transfer Search” page where you may enter search criteria to find patients to transfer. The search will produce one patient or a list of patients from which you can further select one or more patients to transfer.

To view a list of all patients eligible for transfer, you would leave the selection criteria fields blank. To enter search criteria to find a subset of patients, you could either:

- Enter specific patient identifying information under the Client ID Information section to select one patient, or
- Enter a date range during which transactions occurred (i.e., admission dates).

This second approach would produce a list of patients whose transactions (i.e., admissions) occurred during the period you entered.
Once the selection criteria are added, click the **Find** button to view the resulting list of patient transfer candidates who meet the search criteria.
Next you will see the resulting list of transfer candidates, as in the example shown here. From this list, you can select and transfer patients.

To do this, you first need to locate the patient(s) to be transferred. If the list is long, you can sort the list results by one of the shadowed fields shown at the top of each column.

To sort patients on a particular field, click on the field’s shadowed column heading.
In this User Guide example, clicking the shaded column heading “Last Name 2 Char” sorted patients by that field.

NOTE: This created a list of patients sorted by the first two letters of the last (birth) name. Also, note the other sort fields available (e.g., Provider Client ID, Sex, Birth Date, and Last 4 SSN).
Here you see the resulting list of transfer patient candidates sorted by “Last Name 2 Char.”

For each patient on the list that will be transferred, you must select or enter the new program you are transferring each patient to and the transfer date.

If transferring multiple patients, you must enter that information for each patient.
To transfer a patient, click the **down arrow** of the **To Program** field in his/her row to open the dropdown list. Then, select the appropriate program from the dropdown list.
In this User Guide example, the program “128 - Brighter Tomorrows - CD OP Clinic II” is used as the program where the patient will be transferred to.
Next, you must enter the date of the transfer. In this User Guide example, the transfer date “06/25/2008” was entered in the **To Trans. Date** field.

**NOTE:** As with other date fields in OASAS Applications, you can also use the calendar feature to choose the date. Simply click on the **calendar** icon to open up the calendar pop-up window.
Finally, click the **Save** button to begin transferring the patient to the new program.
Next, a window will open reminding you that no transfers will be accepted if ANY of the patients being transferred are from a program where their children are also living in residence and were checked in via the CDS (e.g., from a Residential program with Children in Residence).

<table>
<thead>
<tr>
<th>Provider ID</th>
<th>Sex</th>
<th>Name</th>
<th>Date of Birth</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2456</td>
<td>Female 2/</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3681</td>
<td>Female 5/1/1990</td>
<td>3572</td>
<td>MR</td>
<td>126 - Brighter Tomorrows CD OP Clinic 6/1/2008</td>
</tr>
<tr>
<td>9182</td>
<td>Female 1/1/1953</td>
<td>2837</td>
<td>RM</td>
<td>126 - Brighter Tomorrows CD OP Clinic 1/16/2008</td>
</tr>
<tr>
<td>3971</td>
<td>Male 12/2/1974 0527</td>
<td>SL</td>
<td></td>
<td>126 - Brighter Tomorrows CD OP Clinic 3/12/2008</td>
</tr>
</tbody>
</table>

*If any children are checked in for any of the client or clients you are transferring, the operation for all transfers on this page will fail. If the operation fails, transfer the clients with children using the Transfer action from the Client Search Results page (accessed from the Client Management link on the CDS homepage). Then you may return to this page for the remaining transfers.*
Children in Residence

If any of the patients in the list had a child in residence, then all of the transfers would fail and you would get the following message:

“Children that are currently assigned to this episode must be transferred with the client.”

You would then click on the Home button at the top of the page to return to the CDS Home page. From there, you would transfer the patients with children using the Transfer action from the Client Search Results page (accessed from the Client Management link on the CDS home page).

For any children in residence that are NOT to be transferred to the new program, you would have to check them out of the program first. This can be done via the Client Management link. For more details, see the Update an Existing Transaction (& Entering Children into Client Record) Tutorial and User Guide.

After patient/child transfers are completed, you would return to the "Enter New Transfer" page to complete the remaining patient-only transfers.
If none of the selected transfer patients currently have children in residence, click the **OK** button in the pop-up window to complete the patient transfer(s).
When the transaction has been successfully saved, you will see the following confirmation message: “Transaction completed successfully!”

Also note that the transaction for the transferred patient is gone from the list of eligible transfers for this program (i.e., the chosen “from” program). In this example, the patient with the Provider Client ID of ‘2456’ is now gone from the list.
Any possible Error messages will appear at the top of the page (if applicable). You can use the information in the error message to identify and correct the problem.

For example, if a transfer attempt is made to a program of a different type, you would receive the following error message:

“1. – Transfers can only be made to programs of the same type.”
At this point, you could make additional transfers if needed and click the Save button again to save those new transfers.

NOTE: Depending on the size of your screen, you may need to scroll down to see the Save button.
To return to the “CDS Home” page to perform a different task, you would click **Home** at the top of the page.

![Transfer Tutorial Script - 17- Final Version](image)

**Enter New Transfer**

**Information**

- Transaction completed successfully!

**Provider:** 99998 - Brighter Tomorrows, Inc.

<table>
<thead>
<tr>
<th>Provider Client ID</th>
<th>Sex</th>
<th>Birth Date</th>
<th>Last 4 SSN</th>
<th>Last Name 2 Char</th>
<th>Current Program / To Program</th>
<th>Current Trans. Date / To Trans. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2646</td>
<td>Male</td>
<td>9/25/1949</td>
<td>2456</td>
<td>DU</td>
<td>126 - Brighter Tomorrows-CD OP Clinic</td>
<td>2/14/2008</td>
</tr>
<tr>
<td>9182</td>
<td>Female</td>
<td>1/1/1953</td>
<td>2837</td>
<td>RM</td>
<td>126 - Brighter Tomorrows-CD OP Clinic</td>
<td>1/16/2008</td>
</tr>
<tr>
<td>3681</td>
<td>Female</td>
<td>5/1/1990</td>
<td>3572</td>
<td>MR</td>
<td>126 - Brighter Tomorrows-CD OP Clinic</td>
<td>5/1/2008</td>
</tr>
<tr>
<td>9876</td>
<td>Female</td>
<td>8/1/1985</td>
<td>4231</td>
<td>BA</td>
<td>126 - Brighter Tomorrows-CD OP Clinic</td>
<td>2/14/2008</td>
</tr>
</tbody>
</table>
Once you are finished entering transfers and any other transactions, you can return to the OASAS Applications page by clicking on the Close Application button to exit the application.