

Transfer Clients Between Programs

Summary

NOTE: Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this User Guide might have been removed from the live CDS. Similarly, some new information may appear in the live system that is not reflected in this User Guide. To find the most updated versions of CDS forms and instructions, click the Forms and Instructions tab on the page [OASAS Applications Home](#), located under CDS Documentation.

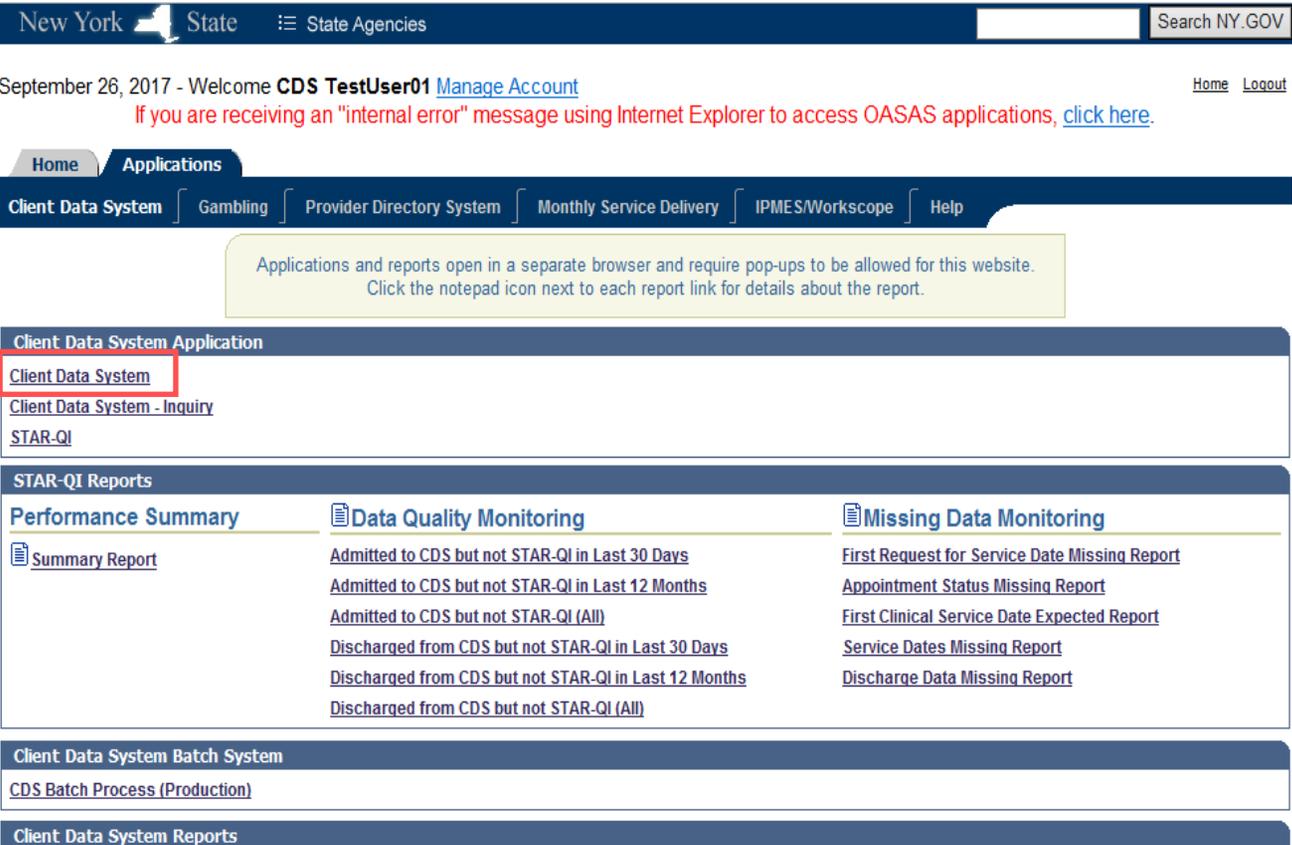
This User Guide will show the user the process of transferring clients from one program to another in the Client Data System (CDS).

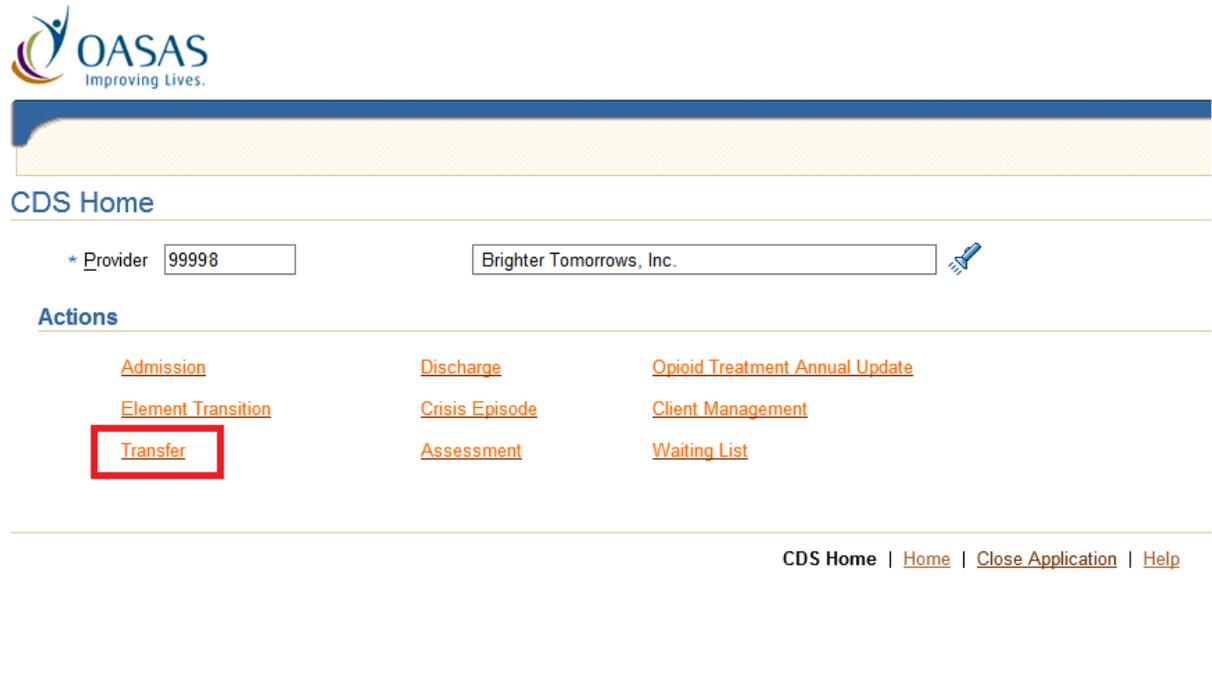
The User Guide will show:

- How to Open the CDS Application
- Enter Program and Client ID Information
- Enter Transition Information
- Fixing Errors

NOTE: It would be helpful to be logged into the OASAS Client Data System application to better follow this User Guide. For more information on logging into the OASAS Client Data System application, please review the Login and Change Password Tutorial or User Guide on the OASAS Applications Home page, located at https://apps.oasas.ny.gov/portal/page/portal/OASAS_APPS.

| Step | Instructions | Image |
|------|--|--|
| 1 | <p>Welcome to the “Transferring a Client Between Programs” User Guide.</p> <p>This User Guide will show you how to transfer a single client or multiple clients in a single transaction.</p> <p>After you log into the OASAS Applications, you will be taken to the <i>OASAS Applications</i> page.</p> <p>To access OASAS Applications, you will click the Applications tab.</p> | <p>The screenshot shows the OASAS Applications page. At the top, there is a navigation bar with 'New York State' and 'State Agencies'. Below this, a welcome message for Kristin Marando is displayed. A yellow banner indicates that the browser might need to be updated before Tuesday, December 4. Below the banner, there are links for browser compatibility and instructions for enabling TLS 1.2. The main content area is divided into two columns. The left column contains 'Application Documentation' with links for quick tips, reference, frequently asked questions, login guides, and external access forms. The right column contains 'CDS Documentation' with tabs for 'Forms and Instructions', 'User Guides', and 'Online Tutorials'. A 'New Tab' button is also visible. Below the documentation, there are sections for 'Consent Forms' and 'Forms and Instructions' with various links and forms.</p> |

| Step | Instructions | Image |
|------|---|---|
| 2 | To open the CDS Application, click the Client Data System link to go to the “CDS Home” page. |  <p>The screenshot shows the user interface for CDS TestUser01. At the top, there is a navigation bar with 'New York State' and 'State Agencies'. Below this, a welcome message and a link to 'Manage Account' are visible. A secondary navigation bar contains 'Home' and 'Applications'. The main navigation bar lists 'Client Data System', 'Gambling', 'Provider Directory System', 'Monthly Service Delivery', 'IPMES/Workscope', and 'Help'. A yellow box contains a note: 'Applications and reports open in a separate browser and require pop-ups to be allowed for this website. Click the notepad icon next to each report link for details about the report.' Under the 'Client Data System Application' section, the 'Client Data System' link is highlighted with a red box. Below this are links for 'Client Data System - Inquiry' and 'STAR-QI'. The 'STAR-QI Reports' section is divided into three columns: 'Performance Summary' (with a 'Summary Report' link), 'Data Quality Monitoring' (with links for 'Admitted to CDS but not STAR-QI in Last 30 Days', 'Admitted to CDS but not STAR-QI in Last 12 Months', 'Admitted to CDS but not STAR-QI (All)', 'Discharged from CDS but not STAR-QI in Last 30 Days', 'Discharged from CDS but not STAR-QI in Last 12 Months', and 'Discharged from CDS but not STAR-QI (All)'), and 'Missing Data Monitoring' (with links for 'First Request for Service Date Missing Report', 'Appointment Status Missing Report', 'First Clinical Service Date Expected Report', 'Service Dates Missing Report', and 'Discharge Data Missing Report'). At the bottom, there are sections for 'Client Data System Batch System' (with a 'CDS Batch Process (Production)' link) and 'Client Data System Reports'.</p> |

| Step | Instructions | Image |
|------|--|--|
| 3 | <p>The first step will be to search for the client(s) you want to transfer.</p> <p>From the “CDS Home” page, first click the Transfer link to open the Transfer Search window.</p> <p>NOTE: CDS transfers can only occur between same-type programs within the same provider.</p> |  |

| Step | Instructions | Image |
|------|---|-------|
| 4 | <p>This brings you to the “<i>Transfer Search</i>” page where you may enter search criteria to find clients to transfer. The search will produce one client or a list of clients from which you can further select one or more clients to transfer.</p> <p>To view a list of all clients eligible for transfer, you would leave the selection criteria fields blank. To enter search criteria to find a subset of clients, you could either:</p> <ul style="list-style-type: none"> Enter specific client identifying information under the <i>Client ID Information</i> section to select one client, or Enter a date range during which transactions occurred (i.e., admission dates). <p>This second approach would produce a list of clients whose transactions (i.e., admissions) occurred during the period you entered. You may select a program from the Current Program dropdown list to obtain a smaller subset.</p> | |

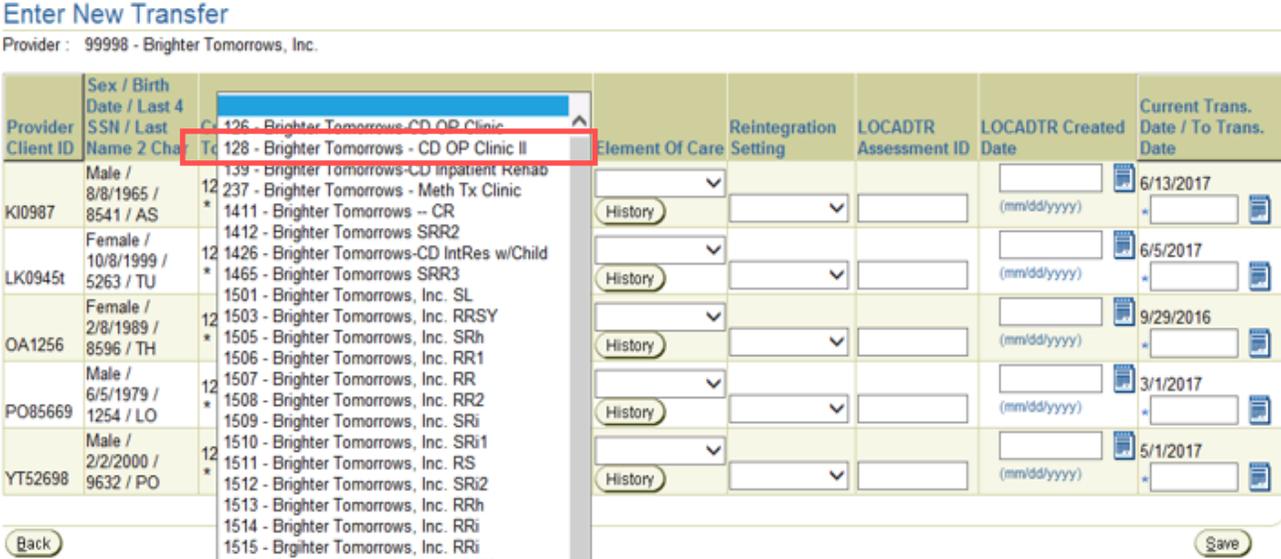
| Step | Instructions | Image |
|------|--|-------|
| 5 | <p>Once the selection criteria are added, click the Find button to view the resulting list of client transfer candidates who meet the search criteria.</p> <p>Here we are searching for clients that are <i>currently</i> active in the identified programs. If searching for clients with transactions entered during a specific time period, enter dates in Transaction Date From/To.</p> | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|---|--------------------|--|------------------------------|----------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|--------|-----------------------------|---------------------------------------|---------|--|--|--------------|-----------|---------|--------------------------------|---------------------------------------|---------|--|--|--------------|----------|---------|-------------------------------|---------------------------------------|---------|--|--|--------------|-----------|---------|--------------------------------|---------------------------------------|---------|--|--|--------------|----------|---------|-------------------------------|---------------------------------------|---------|--|--|--------------|-----------|
| <p>6</p> | <p>Next you will see the resulting list of transfer candidates, as in the example shown here. From this list, you can select and transfer clients.</p> <p>To do this, you first need to locate the client(s) to be transferred. If the list is long, you can sort the list results by one of two fields shown at the top of the columns. These fields are Provider Client ID and Current Trans. Date/To Trans. Date.</p> <p>To sort clients by either of these fields, click on the field's shadowed column heading.</p> | <p>Enter New Transfer Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>KI0987</td> <td>Male / 8/8/1965 / 8541 / AS</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/13/2017</td> </tr> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>3/1/2017</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>5/1/2017</td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/5/2017</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>9/29/2016</td> </tr> </tbody> </table> <p>Back Save</p> <p>Transfer Home Close Application Help</p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/13/2017 | PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/13/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>7</p> | <p>In this User Guide example, clicking the shaded column heading “Provider Client ID” sorted clients by that field.</p> | <p>Enter New Transfer Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>KI0987</td> <td>Male / 8/8/1965 / 8541 / AS</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/13/2017</td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/5/2017</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>9/29/2016</td> </tr> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>3/1/2017</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>5/1/2017</td> </tr> </tbody> </table> <p>Back Save</p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/13/2017 | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 | PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/13/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|---|--|--|------------------------------|--------------------------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|--------|-----------------------------|---------------------------------------|--|----------------------|----------------------|--------------------------------------|-------------------------------------|---------|--------------------------------|---------------------------------------|--|----------------------|----------------------|--------------------------------------|------------------------------------|--------|-------------------------------|---------------------------------------|--|----------------------|----------------------|--------------------------------------|-------------------------------------|---------|-----------------------------|---------------------------------------|--|----------------------|----------------------|--------------------------------------|------------------------------------|---------|-----------------------------|---------------------------------------|--|----------------------|----------------------|--------------------------------------|------------------------------------|
| <p>8</p> | <p>For each client on the list that will be transferred, you must select or enter the new program, Element of Care (if applicable), Reintegration Setting (if applicable) you are transferring each client to, and the transfer date. You may also enter LOCADTR Assessment ID, LOCADTR Created Date,</p> <p>If transferring multiple clients, you must enter the above information for each client.</p> <p>Note: Element of Care and Reintegration Setting apply only to Part 820 residential treatment programs. These items should be left blank for all other service types.</p> <p>LOCADTR Assessment ID and LOCADTR Created Date are optional items. You may submit a transfer without submitting this information. More information regarding LOCADTR 3.0 can be found at LOCADTR 3.0.</p> | <p>Enter New Transfer</p> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>KI0987</td> <td>Male / 8/8/1965 / 8541 / AS</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>6/13/2017 * <input type="text"/></td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>6/5/2017 * <input type="text"/></td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>9/29/2016 * <input type="text"/></td> </tr> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>3/1/2017 * <input type="text"/></td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>5/1/2017 * <input type="text"/></td> </tr> </tbody> </table> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/13/2017 * <input type="text"/> | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/5/2017 * <input type="text"/> | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 9/29/2016 * <input type="text"/> | PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 3/1/2017 * <input type="text"/> | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 5/1/2017 * <input type="text"/> |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/13/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/5/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 9/29/2016 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 3/1/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 5/1/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

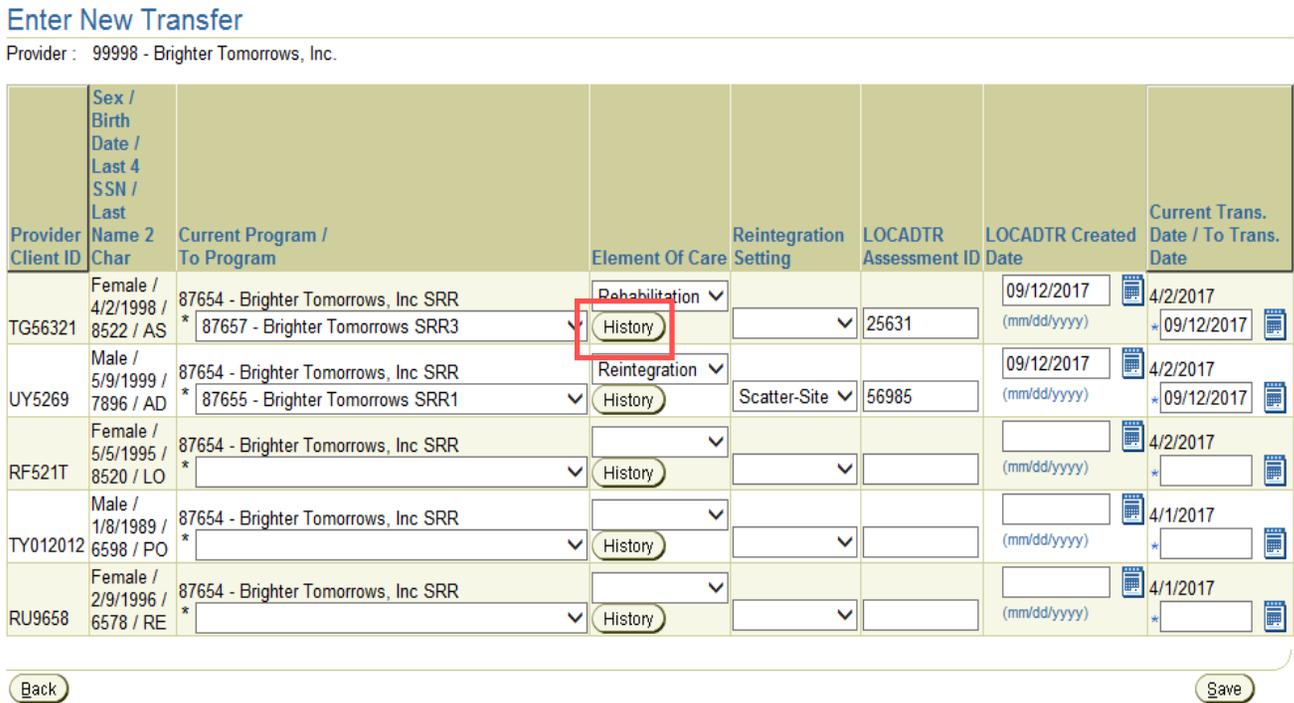
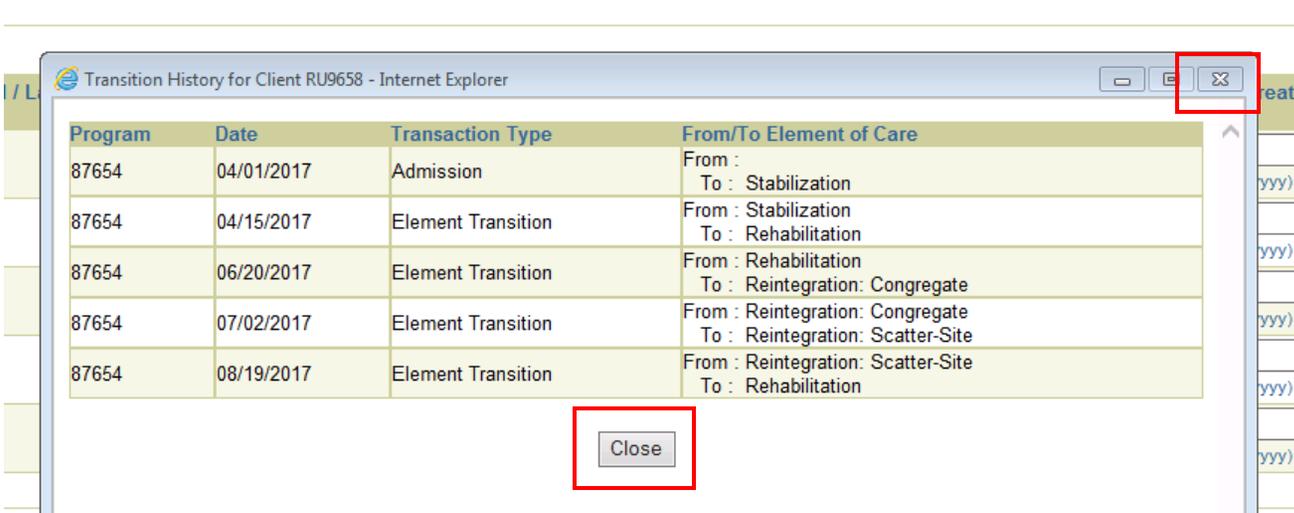
Transfer Clients Between Programs

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|---|---|------------------------------|--|------------------------------|-----------------------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|--------|-----------------------------|---|------------------------------|----------------------|----------------------|-----------------------------------|-------------------------------------|---------|--------------------------------|---|------------------------------|----------------------|----------------------|-----------------------------------|------------------------------------|--------|-------------------------------|---|------------------------------|----------------------|----------------------|-----------------------------------|-------------------------------------|---------|-----------------------------|---|------------------------------|----------------------|----------------------|-----------------------------------|------------------------------------|---------|-----------------------------|---|------------------------------|----------------------|----------------------|-----------------------------------|------------------------------------|
| <p>9a</p> | <p>To transfer a client, click the down arrow of the To Program field in his/her row to open the dropdown list.</p> <p>Then, select the appropriate program from the dropdown list.</p> | <p>Enter New Transfer</p> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>KI0987</td> <td>Male / 8/8/1965 / 8541 / AS</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text"/> History</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>6/13/2017 * <input type="text"/></td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text"/> History</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>6/5/2017 * <input type="text"/></td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text"/> History</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>9/29/2016 * <input type="text"/></td> </tr> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text"/> History</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>3/1/2017 * <input type="text"/></td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text"/> History</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>5/1/2017 * <input type="text"/></td> </tr> </tbody> </table> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/13/2017 * <input type="text"/> | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/5/2017 * <input type="text"/> | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 9/29/2016 * <input type="text"/> | PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 3/1/2017 * <input type="text"/> | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 5/1/2017 * <input type="text"/> |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/13/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/5/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 9/29/2016 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 3/1/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text"/> History | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 5/1/2017 * <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

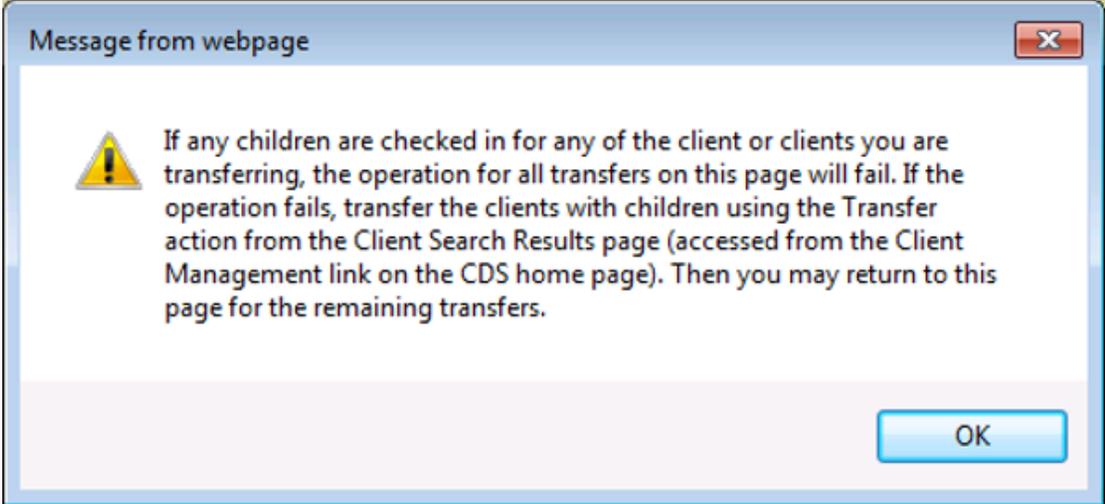
| Step | Instructions | Image |
|------------------|--|---|
| <p>9b</p> | <p>In this User Guide example, the program “128 - Brighter Tomorrows - CD OP Clinic II” is used as the program where the client will be transferred to.</p> |  <p>The screenshot shows the 'Enter New Transfer' interface for Provider: 99998 - Brighter Tomorrows, Inc. It features a table with columns: Provider Client ID, Sex / Birth Date / Last 4 SSN / Last Name 2 Char, a dropdown menu for program selection, Element Of Care, Reintegration Setting, LOCADTR Assessment ID, LOCADTR Created Date, and Current Trans. Date / To Trans. Date. The dropdown menu is open, showing a list of programs including '128 - Brighter Tomorrows - CD OP Clinic II', which is highlighted with a red box. Other programs listed include '139 - Brighter Tomorrows-CD inpatient Kenab', '237 - Brighter Tomorrows - Meth Tx Clinic', '1411 - Brighter Tomorrows -- CR', '1412 - Brighter Tomorrows SRR2', '1426 - Brighter Tomorrows-CD IntRes w/Child', '1465 - Brighter Tomorrows SRR3', '1501 - Brighter Tomorrows, Inc. SL', '1503 - Brighter Tomorrows, Inc. RRSY', '1505 - Brighter Tomorrows, Inc. SRh', '1506 - Brighter Tomorrows, Inc. RR1', '1507 - Brighter Tomorrows, Inc. RR', '1508 - Brighter Tomorrows, Inc. RR2', '1509 - Brighter Tomorrows, Inc. SRi', '1510 - Brighter Tomorrows, Inc. SRi1', '1511 - Brighter Tomorrows, Inc. RS', '1512 - Brighter Tomorrows, Inc. SRi2', '1513 - Brighter Tomorrows, Inc. RRh', '1514 - Brighter Tomorrows, Inc. RRi', and '1515 - Brighter Tomorrows, Inc. RRi'. The table also shows client information and transfer dates for several clients, with 'History' buttons for each row. A 'Back' button is at the bottom left and a 'Save' button is at the bottom right.</p> |

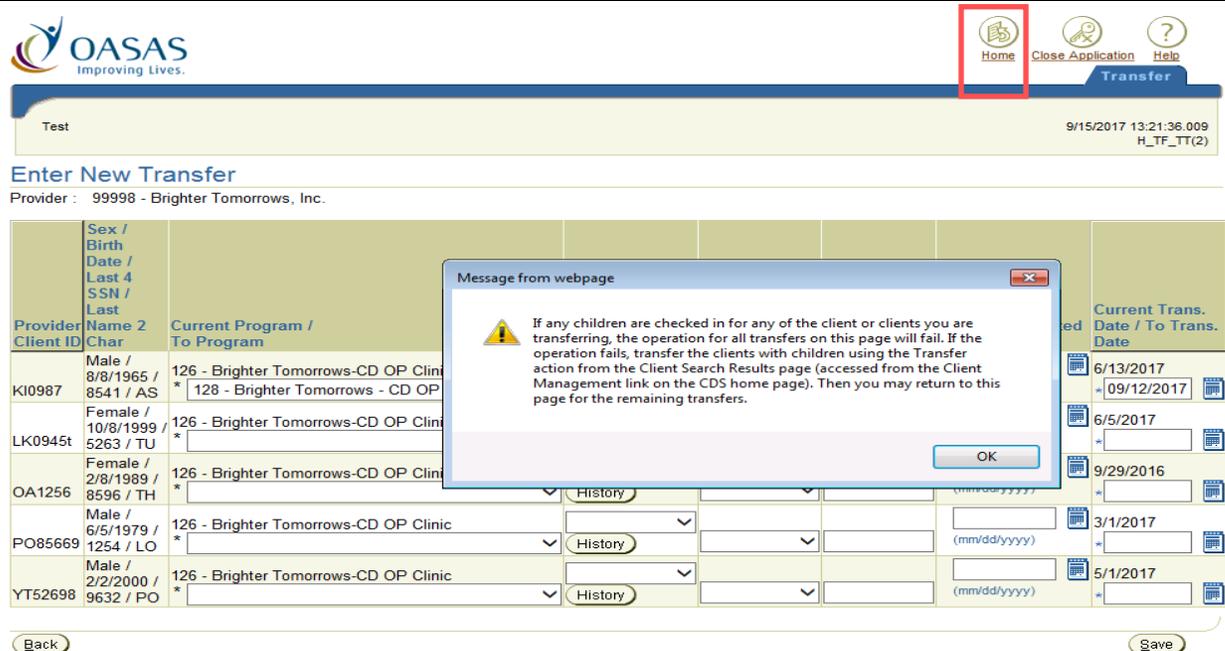
| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|---|--------------------|--|------------------------------|----------------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|--------|-----------------------------|---|---------|--|--------|----------------------------|----------------------------|---------|-----------------------------|---|---------|--|--|--------------|---------------|---------|-----------------------------|---|---------|--|--|--------------|---------------|---------|--------------------------------|---|---------|--|--|--------------|---------------|--------|-------------------------------|---|---------|--|--|--------------|----------------|
| <p>10</p> | <p>Next, you must enter the date of the transfer. In this User Guide example, the transfer date “09/12/2017” was entered in the To Trans. Date field.</p> <p>The fields for LOCADTR Assessment ID and LOCADTR Created Date have also been completed.</p> <p>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 the calendar pop-up window.</p> | <p>Enter New Transfer</p> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>KI0987</td> <td>Male / 8/8/1965 / 8541 / AS</td> <td>* 126 - Brighter Tomorrows-CD OP Clinic 128 - Brighter Tomorrows - CD OP Clinic II</td> <td>History</td> <td></td> <td>854569</td> <td>09/12/2017 (mm/dd/yyyy)</td> <td>09/12/2017 * 09/12/2017</td> </tr> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>* 126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>3/1/2017 *</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>* 126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>5/1/2017 *</td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>* 126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/5/2017 *</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>* 126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>9/29/2016 *</td> </tr> </tbody> </table> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | KI0987 | Male / 8/8/1965 / 8541 / AS | * 126 - Brighter Tomorrows-CD OP Clinic 128 - Brighter Tomorrows - CD OP Clinic II | History | | 854569 | 09/12/2017 (mm/dd/yyyy) | 09/12/2017 * 09/12/2017 | PO85669 | Male / 6/5/1979 / 1254 / LO | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 * | YT52698 | Male / 2/2/2000 / 9632 / PO | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 * | LK0945t | Female / 10/8/1999 / 5263 / TU | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 * | OA1256 | Female / 2/8/1989 / 8596 / TH | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 * |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| KI0987 | Male / 8/8/1965 / 8541 / AS | * 126 - Brighter Tomorrows-CD OP Clinic 128 - Brighter Tomorrows - CD OP Clinic II | History | | 854569 | 09/12/2017 (mm/dd/yyyy) | 09/12/2017 * 09/12/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | * 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|--|--------------------|--|------------------------------|----------------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|---------|-------------------------------|--|----------------|--|-------|----------------------------|--------------------------|--------|-----------------------------|--|---------------|--------------|-------|----------------------------|--------------------------|--------|-------------------------------|--|--|--|--|--|---------------|----------|-----------------------------|--|--|--|--|--|---------------|--------|-------------------------------|--|--|--|--|--|---------------|
| <p>11</p> | <p>This is an example of a transfer for clients transferring between Part 820 residential treatment programs. In this example, two clients are being transferred into two different Part 820 residential treatment programs. To complete a transfer to a Part 820 program, the Element of Care must be selected. A client can also move to a different Element of Care while transferring to a different Part 820 program. If the Element of Care selected is Reintegration, a Reintegration Setting will need to be selected as shown in the second row of this example.</p> <p>NOTE: The two fields identified above should be left blank when the “To Program” is NOT a Part 820 residential treatment program.</p> | <p>The screenshot shows the 'Enter New Transfer' interface for Provider: 99998 - Brighter Tomorrows, Inc. It features a table with the following columns: Provider Client ID, Sex / Birth Date / Last 4 SSN / Last Name 2 Char, Current Program / To Program, Element Of Care, Reintegration Setting, LOCADTR Assessment ID, LOCADTR Created Date, and Current Trans. Date / To Trans. Date. Two rows are highlighted with red boxes: the first row shows 'Rehabilitation' selected in the 'Element Of Care' column, and the second row shows 'Scatter-Site' selected in the 'Reintegration Setting' column.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>TG56321</td> <td>Female / 4/2/1998 / 8522 / AS</td> <td>87654 - Brighter Tomorrows, Inc SRR * 87657 - Brighter Tomorrows SRR3</td> <td>Rehabilitation</td> <td></td> <td>25631</td> <td>09/12/2017 (mm/dd/yyyy)</td> <td>4/2/2017 * 09/12/2017</td> </tr> <tr> <td>UY5269</td> <td>Male / 5/9/1999 / 7896 / AD</td> <td>87654 - Brighter Tomorrows, Inc SRR * 87655 - Brighter Tomorrows SRR1</td> <td>Reintegration</td> <td>Scatter-Site</td> <td>56985</td> <td>09/12/2017 (mm/dd/yyyy)</td> <td>4/2/2017 * 09/12/2017</td> </tr> <tr> <td>RF521T</td> <td>Female / 5/5/1995 / 8520 / LO</td> <td>87654 - Brighter Tomorrows, Inc SRR *</td> <td></td> <td></td> <td></td> <td></td> <td>4/2/2017 *</td> </tr> <tr> <td>TY012012</td> <td>Male / 1/8/1989 / 6598 / PO</td> <td>87654 - Brighter Tomorrows, Inc SRR *</td> <td></td> <td></td> <td></td> <td></td> <td>4/1/2017 *</td> </tr> <tr> <td>RU9658</td> <td>Female / 2/9/1996 / 6578 / RE</td> <td>87654 - Brighter Tomorrows, Inc SRR *</td> <td></td> <td></td> <td></td> <td></td> <td>4/1/2017 *</td> </tr> </tbody> </table> <p>Buttons: Back, Save</p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | TG56321 | Female / 4/2/1998 / 8522 / AS | 87654 - Brighter Tomorrows, Inc SRR * 87657 - Brighter Tomorrows SRR3 | Rehabilitation | | 25631 | 09/12/2017 (mm/dd/yyyy) | 4/2/2017 * 09/12/2017 | UY5269 | Male / 5/9/1999 / 7896 / AD | 87654 - Brighter Tomorrows, Inc SRR * 87655 - Brighter Tomorrows SRR1 | Reintegration | Scatter-Site | 56985 | 09/12/2017 (mm/dd/yyyy) | 4/2/2017 * 09/12/2017 | RF521T | Female / 5/5/1995 / 8520 / LO | 87654 - Brighter Tomorrows, Inc SRR * | | | | | 4/2/2017 * | TY012012 | Male / 1/8/1989 / 6598 / PO | 87654 - Brighter Tomorrows, Inc SRR * | | | | | 4/1/2017 * | RU9658 | Female / 2/9/1996 / 6578 / RE | 87654 - Brighter Tomorrows, Inc SRR * | | | | | 4/1/2017 * |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TG56321 | Female / 4/2/1998 / 8522 / AS | 87654 - Brighter Tomorrows, Inc SRR * 87657 - Brighter Tomorrows SRR3 | Rehabilitation | | 25631 | 09/12/2017 (mm/dd/yyyy) | 4/2/2017 * 09/12/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UY5269 | Male / 5/9/1999 / 7896 / AD | 87654 - Brighter Tomorrows, Inc SRR * 87655 - Brighter Tomorrows SRR1 | Reintegration | Scatter-Site | 56985 | 09/12/2017 (mm/dd/yyyy) | 4/2/2017 * 09/12/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RF521T | Female / 5/5/1995 / 8520 / LO | 87654 - Brighter Tomorrows, Inc SRR * | | | | | 4/2/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TY012012 | Male / 1/8/1989 / 6598 / PO | 87654 - Brighter Tomorrows, Inc SRR * | | | | | 4/1/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RU9658 | Female / 2/9/1996 / 6578 / RE | 87654 - Brighter Tomorrows, Inc SRR * | | | | | 4/1/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

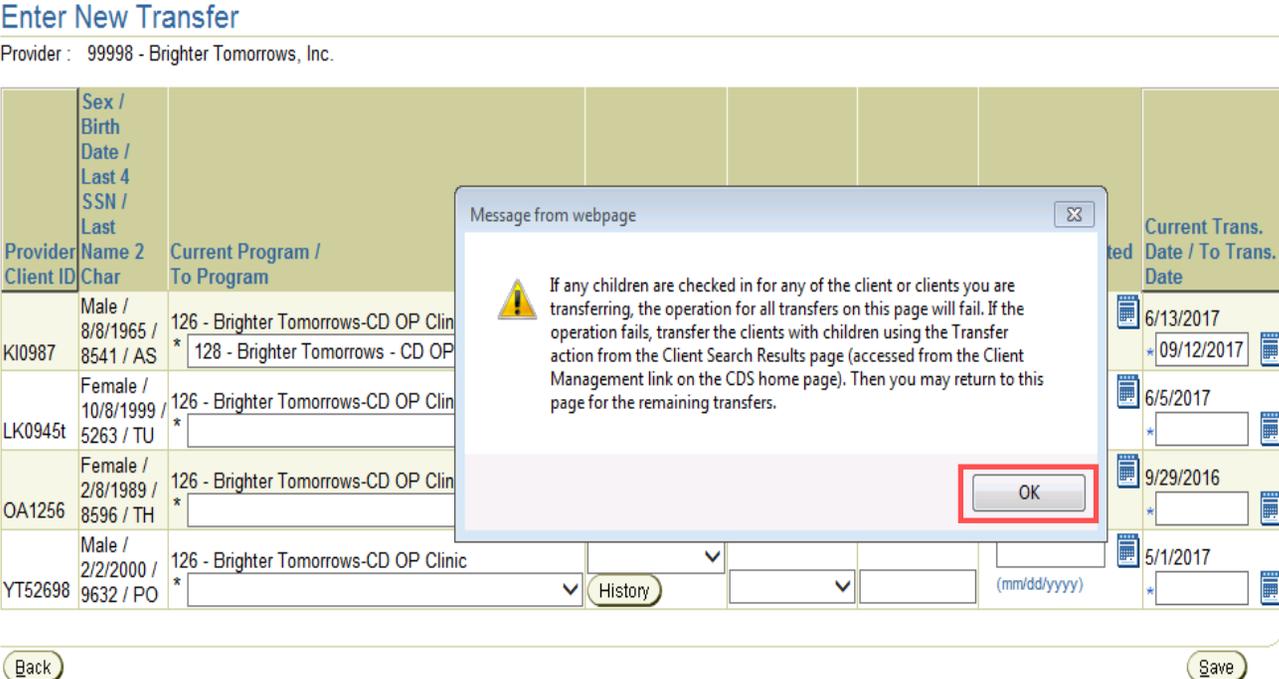
| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------------------|--|--|--|---------------------------|-----------------------|------------------------------|----------------------------|-----------------------|--------------------------------------|------------------------------|----------------------|--------------------------------------|-------------------------------|---|-------|--|---------------------------|---|-------|----------------------------|--------------------|--|-----------------------------|------------|--------------------|--|--------------------------|--------------|-------|----------------------------|------------|------------------------|-------------------------------|--------|---|-------------------------------------|---------|--|--|--|--|----------|-----------------------------|----------|---|-------------------------------------|---------|--|--|--|--|----------|-------------------------------|--------|---|-------------------------------------|---------|--|--|--|--|----------|
| <p>12a</p> | <p>This page includes a History button under Element of Care for each client. Although the button appears for each client, it only applies to Part 820 residential treatment programs.</p> |  <p>The screenshot shows the 'Enter New Transfer' page for Provider: 99998 - Brighter Tomorrows, Inc. It features a table with columns: Sex / Birth Date / Last 4 SSN / Last, Provider Client ID, Name 2 Char, Current Program / To Program, Element Of Care, Reintegration Setting, LOCADTR Assessment ID, LOCADTR Date, LOCADTR Created Date, and Current Trans. Date / To Trans. Date. The 'History' buttons for the first two rows are highlighted with red boxes.</p> <table border="1"> <thead> <tr> <th>Sex / Birth Date / Last 4 SSN / Last</th> <th>Provider Client ID</th> <th>Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Date</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>Female / 4/2/1998 / 8522 / AS</td> <td>TG56321</td> <td>*</td> <td>87654 - Brighter Tomorrows, Inc SRR 87657 - Brighter Tomorrows SRR3</td> <td>Rehabilitation History</td> <td></td> <td>25631</td> <td>09/12/2017 (mm/dd/yyyy)</td> <td>09/12/2017</td> <td>4/2/2017 09/12/2017</td> </tr> <tr> <td>Male / 5/9/1999 / 7896 / AD</td> <td>UY5269</td> <td>*</td> <td>87654 - Brighter Tomorrows, Inc SRR 87655 - Brighter Tomorrows SRR1</td> <td>Reintegration History</td> <td>Scatter-Site</td> <td>56985</td> <td>09/12/2017 (mm/dd/yyyy)</td> <td>09/12/2017</td> <td>4/2/2017 09/12/2017</td> </tr> <tr> <td>Female / 5/5/1995 / 8520 / LO</td> <td>RF521T</td> <td>*</td> <td>87654 - Brighter Tomorrows, Inc SRR</td> <td>History</td> <td></td> <td></td> <td></td> <td></td> <td>4/2/2017</td> </tr> <tr> <td>Male / 1/8/1989 / 6598 / PO</td> <td>TY012012</td> <td>*</td> <td>87654 - Brighter Tomorrows, Inc SRR</td> <td>History</td> <td></td> <td></td> <td></td> <td></td> <td>4/1/2017</td> </tr> <tr> <td>Female / 2/9/1996 / 6578 / RE</td> <td>RU9658</td> <td>*</td> <td>87654 - Brighter Tomorrows, Inc SRR</td> <td>History</td> <td></td> <td></td> <td></td> <td></td> <td>4/1/2017</td> </tr> </tbody> </table> | Sex / Birth Date / Last 4 SSN / Last | Provider Client ID | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Date | LOCADTR Created Date | Current Trans. Date / To Trans. Date | Female / 4/2/1998 / 8522 / AS | TG56321 | * | 87654 - Brighter Tomorrows, Inc SRR 87657 - Brighter Tomorrows SRR3 | Rehabilitation History | | 25631 | 09/12/2017 (mm/dd/yyyy) | 09/12/2017 | 4/2/2017 09/12/2017 | Male / 5/9/1999 / 7896 / AD | UY5269 | * | 87654 - Brighter Tomorrows, Inc SRR 87655 - Brighter Tomorrows SRR1 | Reintegration History | Scatter-Site | 56985 | 09/12/2017 (mm/dd/yyyy) | 09/12/2017 | 4/2/2017 09/12/2017 | Female / 5/5/1995 / 8520 / LO | RF521T | * | 87654 - Brighter Tomorrows, Inc SRR | History | | | | | 4/2/2017 | Male / 1/8/1989 / 6598 / PO | TY012012 | * | 87654 - Brighter Tomorrows, Inc SRR | History | | | | | 4/1/2017 | Female / 2/9/1996 / 6578 / RE | RU9658 | * | 87654 - Brighter Tomorrows, Inc SRR | History | | | | | 4/1/2017 |
| Sex / Birth Date / Last 4 SSN / Last | Provider Client ID | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Date | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Female / 4/2/1998 / 8522 / AS | TG56321 | * | 87654 - Brighter Tomorrows, Inc SRR 87657 - Brighter Tomorrows SRR3 | Rehabilitation History | | 25631 | 09/12/2017 (mm/dd/yyyy) | 09/12/2017 | 4/2/2017 09/12/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Male / 5/9/1999 / 7896 / AD | UY5269 | * | 87654 - Brighter Tomorrows, Inc SRR 87655 - Brighter Tomorrows SRR1 | Reintegration History | Scatter-Site | 56985 | 09/12/2017 (mm/dd/yyyy) | 09/12/2017 | 4/2/2017 09/12/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Female / 5/5/1995 / 8520 / LO | RF521T | * | 87654 - Brighter Tomorrows, Inc SRR | History | | | | | 4/2/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Male / 1/8/1989 / 6598 / PO | TY012012 | * | 87654 - Brighter Tomorrows, Inc SRR | History | | | | | 4/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Female / 2/9/1996 / 6578 / RE | RU9658 | * | 87654 - Brighter Tomorrows, Inc SRR | History | | | | | 4/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>12b</p> | <p>This is an example of the popup window that will appear by clicking the History button. The history of all transactions related to this treatment episode beginning at admission will be displayed. Click either Close or the “X” to close this window.</p> |  <p>The screenshot shows a popup window titled 'Transition History for Client RU9658 - Internet Explorer'. It contains a table with columns: Program, Date, Transaction Type, and From/To Element of Care. A 'Close' button is highlighted with a red box at the bottom of the window.</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Date</th> <th>Transaction Type</th> <th>From/To Element of Care</th> </tr> </thead> <tbody> <tr> <td>87654</td> <td>04/01/2017</td> <td>Admission</td> <td>From : To : Stabilization</td> </tr> <tr> <td>87654</td> <td>04/15/2017</td> <td>Element Transition</td> <td>From : Stabilization To : Rehabilitation</td> </tr> <tr> <td>87654</td> <td>06/20/2017</td> <td>Element Transition</td> <td>From : Rehabilitation To : Reintegration: Congregate</td> </tr> <tr> <td>87654</td> <td>07/02/2017</td> <td>Element Transition</td> <td>From : Reintegration: Congregate To : Reintegration: Scatter-Site</td> </tr> <tr> <td>87654</td> <td>08/19/2017</td> <td>Element Transition</td> <td>From : Reintegration: Scatter-Site To : Rehabilitation</td> </tr> </tbody> </table> | Program | Date | Transaction Type | From/To Element of Care | 87654 | 04/01/2017 | Admission | From : To : Stabilization | 87654 | 04/15/2017 | Element Transition | From : Stabilization To : Rehabilitation | 87654 | 06/20/2017 | Element Transition | From : Rehabilitation To : Reintegration: Congregate | 87654 | 07/02/2017 | Element Transition | From : Reintegration: Congregate To : Reintegration: Scatter-Site | 87654 | 08/19/2017 | Element Transition | From : Reintegration: Scatter-Site To : Rehabilitation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Program | Date | Transaction Type | From/To Element of Care | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 87654 | 04/01/2017 | Admission | From : To : Stabilization | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 87654 | 04/15/2017 | Element Transition | From : Stabilization To : Rehabilitation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 87654 | 06/20/2017 | Element Transition | From : Rehabilitation To : Reintegration: Congregate | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 87654 | 07/02/2017 | Element Transition | From : Reintegration: Congregate To : Reintegration: Scatter-Site | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 87654 | 08/19/2017 | Element Transition | From : Reintegration: Scatter-Site To : Rehabilitation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------------------|---|--|--------------------------------------|-----------------------|------------------------------|----------------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|-----------------------------|--------|---|---------|--|--------|----------------------------|---------------------------|--------------------------------|---------|--|---------|--|--|--------------|---------------|-------------------------------|--------|--|---------|--|--|--------------|----------------|-----------------------------|---------|--|---------|--|--|--------------|---------------|-----------------------------|---------|--|---------|--|--|--------------|---------------|
| <p>12c</p> | <p>Finally, click the Save button to begin transferring the client to the new program.</p> <p>NOTE: You may complete additional transfers for clients displayed for this search prior to saving the information.</p> | <p>OASAS Improving Lives.</p> <p>Home Close Application Help</p> <p>Transfer</p> <p>9/15/2017 10:05:46.840 H_TF_TT(2)</p> <p>Enter New Transfer</p> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1"> <thead> <tr> <th>Sex / Birth Date / Last 4 SSN / Last</th> <th>Provider Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>Male / 8/8/1965 / 8541 / AS</td> <td>KI0987</td> <td>126 - Brighter Tomorrows-CD OP Clinic * 128 - Brighter Tomorrows - CD OP Clinic II</td> <td>History</td> <td></td> <td>854569</td> <td>09/12/2017 (mm/dd/yyyy)</td> <td>6/13/2017 * 09/12/2017</td> </tr> <tr> <td>Female / 10/8/1999 / 5263 / TU</td> <td>LK0945t</td> <td>126 - Brighter Tomorrows-CD OP Clinic *</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/5/2017 *</td> </tr> <tr> <td>Female / 2/8/1989 / 8596 / TH</td> <td>OA1256</td> <td>126 - Brighter Tomorrows-CD OP Clinic *</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>9/29/2016 *</td> </tr> <tr> <td>Male / 6/5/1979 / 1254 / LO</td> <td>PO85669</td> <td>126 - Brighter Tomorrows-CD OP Clinic *</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>3/1/2017 *</td> </tr> <tr> <td>Male / 2/2/2000 / 9632 / PO</td> <td>YT52698</td> <td>126 - Brighter Tomorrows-CD OP Clinic *</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>5/1/2017 *</td> </tr> </tbody> </table> <p>Back Save</p> | Sex / Birth Date / Last 4 SSN / Last | Provider Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | Male / 8/8/1965 / 8541 / AS | KI0987 | 126 - Brighter Tomorrows-CD OP Clinic * 128 - Brighter Tomorrows - CD OP Clinic II | History | | 854569 | 09/12/2017 (mm/dd/yyyy) | 6/13/2017 * 09/12/2017 | Female / 10/8/1999 / 5263 / TU | LK0945t | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 6/5/2017 * | Female / 2/8/1989 / 8596 / TH | OA1256 | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 9/29/2016 * | Male / 6/5/1979 / 1254 / LO | PO85669 | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 3/1/2017 * | Male / 2/2/2000 / 9632 / PO | YT52698 | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 5/1/2017 * |
| Sex / Birth Date / Last 4 SSN / Last | Provider Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Male / 8/8/1965 / 8541 / AS | KI0987 | 126 - Brighter Tomorrows-CD OP Clinic * 128 - Brighter Tomorrows - CD OP Clinic II | History | | 854569 | 09/12/2017 (mm/dd/yyyy) | 6/13/2017 * 09/12/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Female / 10/8/1999 / 5263 / TU | LK0945t | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 6/5/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Female / 2/8/1989 / 8596 / TH | OA1256 | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 9/29/2016 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Male / 6/5/1979 / 1254 / LO | PO85669 | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 3/1/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Male / 2/2/2000 / 9632 / PO | YT52698 | 126 - Brighter Tomorrows-CD OP Clinic * | History | | | (mm/dd/yyyy) | 5/1/2017 * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image |
|------|---|---|
| 13 | Next, a window will open reminding you that no transfers will be accepted if ANY of the clients 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). |  A screenshot of a Windows-style dialog box titled "Message from webpage". The dialog box has a light blue header bar with a red "X" close button in the top right corner. On the left side, there is a yellow warning triangle icon with a black exclamation mark. To the right of the icon, the text reads: "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 home page). Then you may return to this page for the remaining transfers." At the bottom right of the dialog box, there is a blue "OK" button. |

| Step | Instructions | Image |
|-------------------|--|--|
| <p>14a</p> | <p>Children in Residence</p> <p>If any of the clients in the list had a child in residence, then all of the transfers would fail as stated in the message displayed.</p> <p>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 clients with children using the Transfer action from the Client Search Results page (accessed from the Client Management link on the CDS home page).</p> <p>NOTE: See the <i>Client Management & Change Provider/Tracking ID User Guide</i> available on the Home tab of the Applications site for more information regarding using Client Management to transfer clients.</p> |  <p>The screenshot shows the OASAS web application interface. At the top, there is a navigation bar with buttons for 'Home', 'Close Application', and 'Help'. The 'Home' button is highlighted with a red box. Below the navigation bar, there is a header section with the OASAS logo and the text 'Improving Lives.'. The main content area displays a table of clients with columns for 'Provider Client ID', 'Sex / Birth Date / Last 4 SSN / Last Name 2', 'Current Program / To Program', and 'Current Trans. Date / To Trans. Date'. A modal dialog box titled 'Message from webpage' is overlaid on the table, displaying a warning icon and the following text: '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 home page). Then you may return to this page for the remaining transfers.' The dialog box has an 'OK' button. At the bottom of the table, there are 'Back' and 'Save' buttons.</p> |

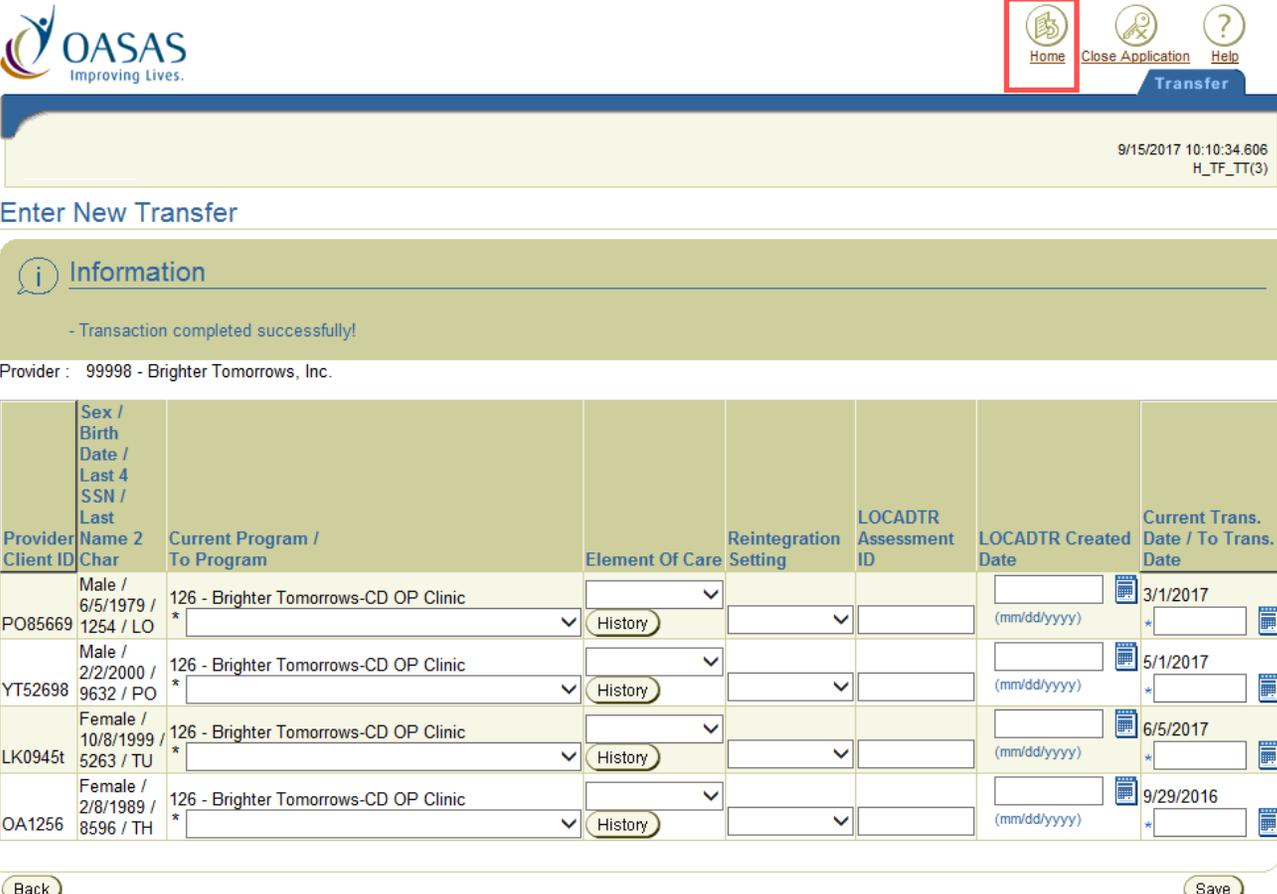
| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----------------------------------|---|--|--------|------------|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|----------------------------------|------|----------|--------|----------|------|----|-----------|----------|-----------------------|------|----------|------|-----------|------|----|----------|----------|
| <p>14b</p> | <p>After selecting the client to transfer, you will be directed to a Transfer page that includes all the data items outlined in this guide as well as an option to transfer the child.</p> <p>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.</p> <p>After client/child transfers are completed, you would return to the "Enter New Transfer" page to complete the remaining client-only transfers.</p> <p>NOTE: See <i>Updating an Existing Transaction and Enter Children User Guide</i> available on the Home tab of the Applications site for more information on Children in Residence transactions.</p> | <p>The screenshot displays the 'Transfer Client' interface. At the top, there is a 'Select Client' header with a 'Transfer' dropdown menu and a 'Go' button. Below this is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td>1426</td> <td>BS012616</td> <td>Female</td> <td>1/1/1970</td> <td>7070</td> <td>ZE</td> <td>7/16/2016</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1426</td> <td>PB131313</td> <td>Male</td> <td>1/13/1983</td> <td>1313</td> <td>QQ</td> <td>7/4/2016</td> <td>Transfer</td> </tr> </tbody> </table> <p>Below the table is the 'Transfer To' section, which includes the following fields:</p> <ul style="list-style-type: none"> * Program : [Dropdown] * Transfer Date : [Text input] (mm/dd/yyyy) Element of Care : [Dropdown] Reintegration Setting : [Dropdown] LOCADTR Assessment ID : [Text input] LOCADTR Created Date : [Text input] (mm/dd/yyyy) Transfer Child In Residence : <input type="checkbox"/> <p>At the bottom of the form, there are three buttons: 'Back', 'Children in Residence', and 'Save'.</p> | Select | Program No | Provider Client ID | Sex | Birth Date | Last 4 SSN | Last Name 2 Char | Transaction Date | Transaction Type | <input checked="" type="radio"/> | 1426 | BS012616 | Female | 1/1/1970 | 7070 | ZE | 7/16/2016 | Transfer | <input type="radio"/> | 1426 | PB131313 | Male | 1/13/1983 | 1313 | QQ | 7/4/2016 | Transfer |
| Select | Program No | Provider Client ID | Sex | Birth Date | Last 4 SSN | Last Name 2 Char | Transaction Date | Transaction Type | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> | 1426 | BS012616 | Female | 1/1/1970 | 7070 | ZE | 7/16/2016 | Transfer | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> | 1426 | PB131313 | Male | 1/13/1983 | 1313 | QQ | 7/4/2016 | Transfer | | | | | | | | | | | | | | | | | | | | | |

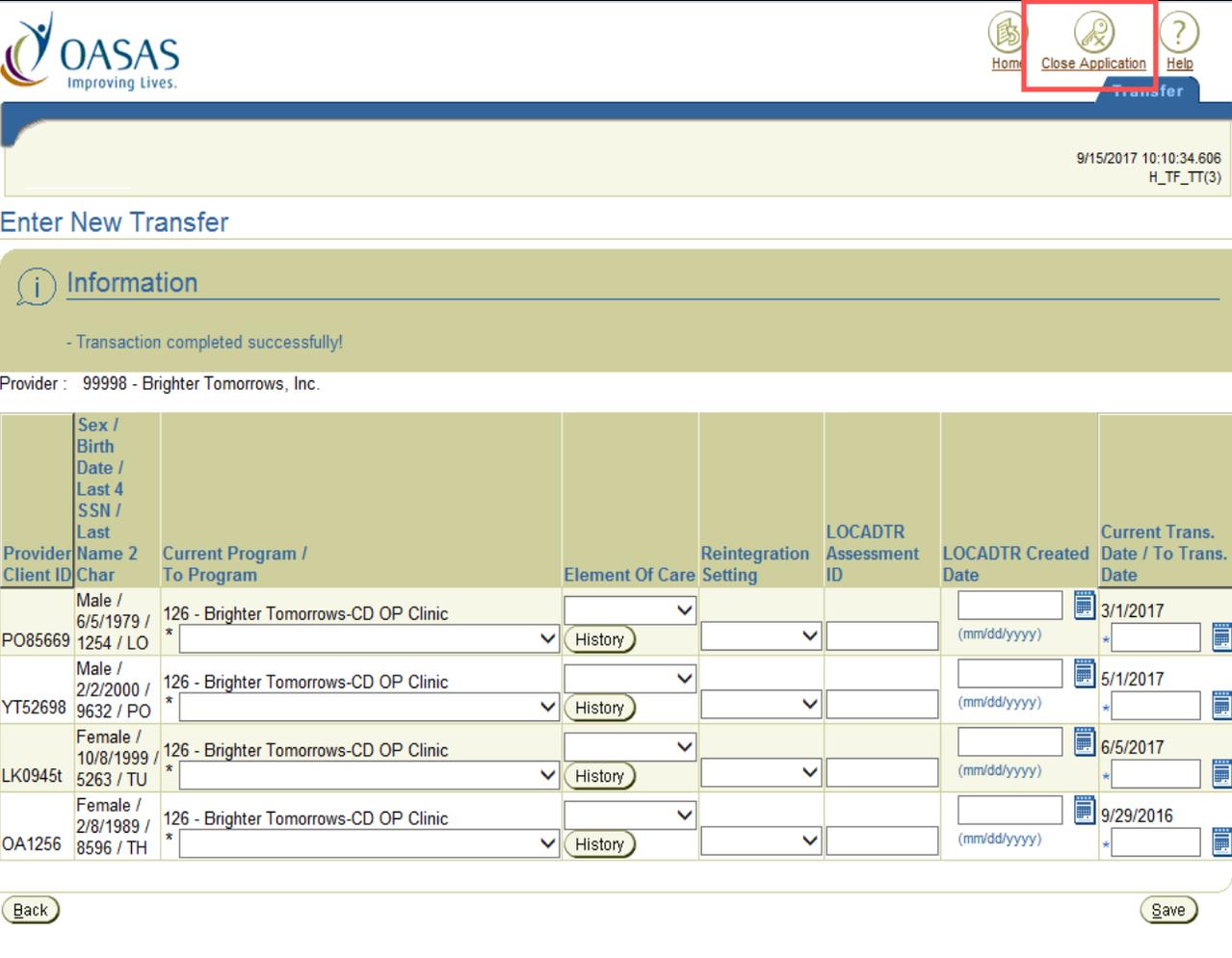
| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|---|--------------------------------------|--|------------------------------|--------------------------------------|--------|-----------------------------|---|---------------------------|---------|--------------------------------|--|---------------|--------|-------------------------------|--|----------------|---------|-----------------------------|--|---------------|
| 15 | If none of the selected transfer clients currently have children in residence, click the OK button in the pop-up window to complete the client transfer(s). |  <p>The screenshot shows the 'Enter New Transfer' page for Provider 99998 - Brighter Tomorrows, Inc. It features a table with columns for Sex / Birth Date / Last 4 SSN / Last Name 2 Char, Current Program / To Program, and Current Trans. Date / To Trans. Date. A warning message box is overlaid on the table, with the 'OK' button highlighted in red.</p> <table border="1" data-bbox="730 305 2009 824"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>KI0987</td> <td>Male / 8/8/1965 / 8541 / AS</td> <td>126 - Brighter Tomorrows-CD OP Clin * 128 - Brighter Tomorrows - CD OP</td> <td>6/13/2017 * 09/12/2017</td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clin *</td> <td>6/5/2017 *</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clin *</td> <td>9/29/2016 *</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic *</td> <td>5/1/2017 *</td> </tr> </tbody> </table> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Current Trans. Date / To Trans. Date | KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clin * 128 - Brighter Tomorrows - CD OP | 6/13/2017 * 09/12/2017 | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clin * | 6/5/2017 * | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clin * | 9/29/2016 * | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic * | 5/1/2017 * |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | |
| KI0987 | Male / 8/8/1965 / 8541 / AS | 126 - Brighter Tomorrows-CD OP Clin * 128 - Brighter Tomorrows - CD OP | 6/13/2017 * 09/12/2017 | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clin * | 6/5/2017 * | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clin * | 9/29/2016 * | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic * | 5/1/2017 * | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|--|---|--|------------------------------|-----------------------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|---------|-----------------------------|---------------------------------------|---|----------------------|----------------------|-----------------------------------|-------------------------------|---------|--------------------------------|---------------------------------------|---|----------------------|----------------------|-----------------------------------|-------------------------------|---------|-----------------------------|---------------------------------------|---|----------------------|----------------------|-----------------------------------|-------------------------------|--------|-------------------------------|---------------------------------------|---|----------------------|----------------------|-----------------------------------|--------------------------------|
| <p>16</p> | <p>When the transaction has been successfully saved, you will see the following confirmation message: “Transaction completed successfully!”</p> <p>Also, note that the transaction for the transferred client is gone from the list of eligible transfers for this program (i.e., the chosen “from” program). In this example, the client with the Provider Client ID of ‘KIO987’ is now gone from the list.</p> | <p>Enter New Transfer</p> <div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;"> <p>Information</p> <p>- Transaction completed successfully!</p> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> </div> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>5/1/2017 <input type="text"/></td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>6/5/2017 <input type="text"/></td> </tr> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>3/1/2017 <input type="text"/></td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text"/> <input type="button" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/> (mm/dd/yyyy)</td> <td>9/29/2016 <input type="text"/></td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="Back"/> <input type="button" value="Save"/> </p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 5/1/2017 <input type="text"/> | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/5/2017 <input type="text"/> | PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 3/1/2017 <input type="text"/> | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 9/29/2016 <input type="text"/> |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 5/1/2017 <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 6/5/2017 <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 3/1/2017 <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text"/> <input type="button" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> (mm/dd/yyyy) | 9/29/2016 <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|---|---|--------------------------------------|--|------------------------------|--|--|-----------------------|----------------------|--------------------------------------|---------|--------------------------------|--|--------------------------------------|----------------------|----------------------|---|--|--------|-------------------------------|---|--------------------------------------|----------------------|----------------------|--|----------------------|---------|-----------------------------|---|--------------------------------------|----------------------|----------------------|---|----------------------|
| <p>17</p> | <p>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.</p> <p>For example, if a transfer attempt is made to a program of a different service type, you would receive the following error message:</p> <p>“- For Provider Client ID LK0945t=> Transfers can only be made to programs of the same type.”</p> | <p>Enter New Transfer</p> <div style="border: 2px solid red; padding: 5px; margin-bottom: 10px;"> <p> Error</p> <p>- For Provider Client ID LK0945t => Transfers can only be made to programs of the same type.</p> </div> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic * 139 - Brighter Tomorrows-CD Inpatient Rehab</td> <td><input type="text" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="6/5/2017"/> (mm/dd/yyyy)</td> <td><input type="text" value="9/12/2017"/> + <input type="text"/></td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="9/29/2016"/> (mm/dd/yyyy)</td> <td><input type="text"/></td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/></td> <td><input type="text" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="5/1/2017"/> (mm/dd/yyyy)</td> <td><input type="text"/></td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="Back"/> <input type="button" value="Save"/> </p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic * 139 - Brighter Tomorrows-CD Inpatient Rehab | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="6/5/2017"/> (mm/dd/yyyy) | <input type="text" value="9/12/2017"/> + <input type="text"/> | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="9/29/2016"/> (mm/dd/yyyy) | <input type="text"/> | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="5/1/2017"/> (mm/dd/yyyy) | <input type="text"/> |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic * 139 - Brighter Tomorrows-CD Inpatient Rehab | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="6/5/2017"/> (mm/dd/yyyy) | <input type="text" value="9/12/2017"/> + <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="9/29/2016"/> (mm/dd/yyyy) | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic * <input type="text"/> | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="5/1/2017"/> (mm/dd/yyyy) | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|---|--|--------------------------------------|-----------------------|------------------------------|---|--------------------------------------|-----------------------|----------------------|--------------------------------------|---------|--------------------------------|---------------------------------------|--------------------------------------|----------------------|----------------------|---|----------|--------|-------------------------------|---------------------------------------|--------------------------------------|----------------------|----------------------|---|-----------|---------|-----------------------------|---------------------------------------|--------------------------------------|----------------------|----------------------|---|----------|
| <p>18</p> | <p>Once all errors are resolved and the transaction is saved, you could make additional transfers if needed and click the Save button again to save those new transfers.</p> <p>NOTE: Depending on the size of your screen, you may need to scroll down to see the Save button.</p> | <div data-bbox="730 224 976 256">Enter New Transfer</div> <div data-bbox="751 289 945 332">  Information </div> <div data-bbox="802 365 1096 389">- Transaction completed successfully!</div> <div data-bbox="730 409 1071 435">Provider : 99998 - Brighter Tomorrows, Inc.</div> <table border="1" data-bbox="730 454 2024 885"> <thead> <tr> <th>Provider Client ID</th> <th>Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="(mm/dd/yyyy)"/></td> <td>6/5/2017</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="(mm/dd/yyyy)"/></td> <td>9/29/2016</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td><input type="text" value="History"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="(mm/dd/yyyy)"/></td> <td>5/1/2017</td> </tr> </tbody> </table> <div data-bbox="739 922 798 954">Back</div> <div data-bbox="1906 922 1990 966">Save</div> | Provider Client ID | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="(mm/dd/yyyy)"/> | 6/5/2017 | OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="(mm/dd/yyyy)"/> | 9/29/2016 | YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="(mm/dd/yyyy)"/> | 5/1/2017 |
| Provider Client ID | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="(mm/dd/yyyy)"/> | 6/5/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="(mm/dd/yyyy)"/> | 9/29/2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | 126 - Brighter Tomorrows-CD OP Clinic | <input type="text" value="History"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="(mm/dd/yyyy)"/> | 5/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|---|--|---------------------------------------|--------------------------------------|-----------------------|------------------------------|----------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|---------|-----------------------------|---|---------------------------------------|---------|--|--|--------------|----------|---------|-----------------------------|---|---------------------------------------|---------|--|--|--------------|----------|---------|--------------------------------|---|---------------------------------------|---------|--|--|--------------|----------|--------|-------------------------------|---|---------------------------------------|---------|--|--|--------------|-----------|
| 19 | To return to the “CDS Home” page to perform a different task, you would click Home at the top of the page. |  <p>The screenshot shows the OASAS web application interface. At the top right, there are three navigation buttons: 'Home' (highlighted with a red box), 'Close Application', and 'Help'. Below these is a 'Transfer' button. The main content area displays 'Enter New Transfer' and an 'Information' section with a message: '- Transaction completed successfully!'. Below this, it shows 'Provider : 99998 - Brighter Tomorrows, Inc.' and a table of transfer records.</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last</th> <th>Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td>*</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>3/1/2017</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td>*</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>5/1/2017</td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td>*</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/5/2017</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td>*</td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>9/29/2016</td> </tr> </tbody> </table> <p>At the bottom of the interface, there are 'Back' and 'Save' buttons.</p> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | PO85669 | Male / 6/5/1979 / 1254 / LO | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | YT52698 | Male / 2/2/2000 / 9632 / PO | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | LK0945t | Female / 10/8/1999 / 5263 / TU | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | OA1256 | Female / 2/8/1989 / 8596 / TH | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | * | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Instructions | Image | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|---|--|---------------------------------------|--------------------------------------|-----------------------|------------------------------|----------------------|--------------------------------------|-----------------------|----------------------|--------------------------------------|---------|-----------------------------|--|---------------------------------------|---------|--|--|--------------|----------|---------|-----------------------------|--|---------------------------------------|---------|--|--|--------------|----------|---------|--------------------------------|--|---------------------------------------|---------|--|--|--------------|----------|--------|-------------------------------|--|---------------------------------------|---------|--|--|--------------|-----------|
| 20 | Once you are finished entering transfers and any other transactions, you can return to the <i>OASAS Applications</i> page by clicking on the Close Application button to exit the application. |  <p>The screenshot shows the OASAS web application interface. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' buttons. The 'Close Application' button is highlighted with a red box. Below the navigation bar, the date and time '9/15/2017 10:10:34.606 H_TF_TT(3)' are displayed. The main content area is titled 'Enter New Transfer' and contains an 'Information' section with a message: '- Transaction completed successfully!'. Below this, the provider is identified as '99998 - Brighter Tomorrows, Inc.'. A table lists client transfers with columns for Provider Client ID, Sex / Birth Date / Last 4 SSN / Last, Name 2 Char, Current Program / To Program, Element Of Care, Reintegration Setting, LOCADTR Assessment ID, LOCADTR Created Date, and Current Trans. Date / To Trans. Date. The table contains four rows of data. At the bottom of the table, there are 'Back' and 'Save' buttons.</p> <table border="1" data-bbox="730 630 2009 1096"> <thead> <tr> <th>Provider Client ID</th> <th>Sex / Birth Date / Last 4 SSN / Last</th> <th>Name 2 Char</th> <th>Current Program / To Program</th> <th>Element Of Care</th> <th>Reintegration Setting</th> <th>LOCADTR Assessment ID</th> <th>LOCADTR Created Date</th> <th>Current Trans. Date / To Trans. Date</th> </tr> </thead> <tbody> <tr> <td>PO85669</td> <td>Male / 6/5/1979 / 1254 / LO</td> <td></td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>3/1/2017</td> </tr> <tr> <td>YT52698</td> <td>Male / 2/2/2000 / 9632 / PO</td> <td></td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>5/1/2017</td> </tr> <tr> <td>LK0945t</td> <td>Female / 10/8/1999 / 5263 / TU</td> <td></td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>6/5/2017</td> </tr> <tr> <td>OA1256</td> <td>Female / 2/8/1989 / 8596 / TH</td> <td></td> <td>126 - Brighter Tomorrows-CD OP Clinic</td> <td>History</td> <td></td> <td></td> <td>(mm/dd/yyyy)</td> <td>9/29/2016</td> </tr> </tbody> </table> | Provider Client ID | Sex / Birth Date / Last 4 SSN / Last | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | PO85669 | Male / 6/5/1979 / 1254 / LO | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | YT52698 | Male / 2/2/2000 / 9632 / PO | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | LK0945t | Female / 10/8/1999 / 5263 / TU | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | OA1256 | Female / 2/8/1989 / 8596 / TH | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 |
| Provider Client ID | Sex / Birth Date / Last 4 SSN / Last | Name 2 Char | Current Program / To Program | Element Of Care | Reintegration Setting | LOCADTR Assessment ID | LOCADTR Created Date | Current Trans. Date / To Trans. Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PO85669 | Male / 6/5/1979 / 1254 / LO | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 3/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YT52698 | Male / 2/2/2000 / 9632 / PO | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 5/1/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LK0945t | Female / 10/8/1999 / 5263 / TU | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 6/5/2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OA1256 | Female / 2/8/1989 / 8596 / TH | | 126 - Brighter Tomorrows-CD OP Clinic | History | | | (mm/dd/yyyy) | 9/29/2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |