



## Transfer/Discharge Request

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# Transfer/Discharge Request

In this lesson you will learn to initiate a request to transfer or discharge a client. You will see how your supervisor reviews and then accepts or rejects the request.

Finally, you will see how, in the case of a transfer, the receiving supervisor reviews and then accepts or rejects the request.

## Lesson Objectives

- Understand how to use the Transfer/Discharge Request window
- Learn which parts of the window are used by the following people:
  - Requesting clinician
  - Clinician's supervisor
  - Supervisor at receiving location

## LESSON SCENARIO

Adam Apple is moving to a new city within San Mateo County. His clinician is requesting a transfer for Adam to a program that is closer to his new home. The clinician makes the request using the Transfer/Discharge Request window.

AVPMTST (SAMPLE) - APPLE, ADAM (000000390)/Transfer/Discharge Request

File Edit Favorites Avatar PM Avatar CWS Help

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ADAM APPLE (000000390) Episode: 1 Client's Home Phone: 650-286-8466; Date Of Birth: 01/01/1984; Sex: Male

**Transfer / Discharge Request** Supervisor Authorization Status Receiving Clinic Approval Status Notify

Type of Request

Discharge  Transfer

Transfer To

NORTH COUNTY

If client requests services in future

Return Directly to Region

Re-evaluated by ACCESS

Unable to Determine At This Time

Current Treatment Information and Alerts

Transfer / Discharge Reason

Client is moving to Daly City.

Requested By

BULL

Name/ID Number  Unique Practitioner ID

BULL, INGALL (000016)

Date of Request

10/08/2009

Option

Complete

The supervisor will review the request and approve it, and when approved, the receiving clinic's supervisor will also review the request and approve it. The receiving clinic will admit Adam to a new episode and the transferring clinic will discharge Adam from his current episode.

## UNDERSTANDING TRANSFER/DISCHARGE REQUEST

Clinicians use this window to request a client discharge or transfer for supervisor approval.

- **Discharge:** You choose discharge when you are closing the client's episode to your team and are not sending them to another team within BHRS.
- **Transfer:** You choose transfer when you are closing the client to your team and sending them on to another BHRS team.

The clinician's supervisor reviews and either approves or rejects the request. If the request is for a transfer and the clinician's supervisor approves it, the receiving team's supervisor then reviews and accepts or rejects the request.

The Transfer/Discharge Request Bundle combines the request window and the BHRS Diagnosis window so that you can complete a discharge diagnosis. (See the BHRS Diagnosis section of the Admission Assessment lesson for details.)

### WHO CAN PERFORM THIS FUNCTION?

The client's Primary Therapist can initiate a transfer or discharge request, but only a Supervisor or Unit Chief can approve the request.

### MENU PATH

Avatar CWS→Other Chart Entry→Transfer/Discharge Request Bundle

## TRANSFER/DISCHARGE REQUEST TAB

The clinician initiates the request by completing the Transfer/Discharge Request and Notify tabs. The request then goes to whoever is selected on the Notify tab (usually the clinician's Supervisor). The item appears in the approving person's To-Do list.



### IMPORTANT

When a discharge request is approved, the requesting clinician needs to create a progress note documenting the discharge and the reason for it.

Field	Description
A) Type of Request	Choose whether this is a Discharge or Transfer request.
B) Transfer To	If it is a transfer request, enter the program the client is to be transferred to.
C) Current Treatment Information and Alerts	Document information on the current treatment the client is receiving and any client alerts.
D) Transfer / Discharge Reason	Document a reason for the request.
E) Requested By	Enter the name of the BHRS staff making the request.

## SUPERVISOR AUTHORIZATION STATUS TAB

Only supervisors complete the Supervisor Authorization Status tab. If the request is for a client to be discharged, the supervisor can approve it here and this ends the process. If the supervisor approves a transfer, it gets routed to the staff member selected on the Notify tab (usually the supervisor of the receiving clinic). The request will appear in the receiving clinic supervisor's To-Do list.

Field	Description
A) Authorization Status	The supervisor of the clinician making the request accepts or rejects the request.
B) Comments	Document the reason for the decision.
C) Authorized By	This is the name of the supervisor accepting or rejecting the request.

## RECEIVING CLINIC APPROVAL STATUS TAB

If the request is for a transfer, the receiving clinic's supervisor completes the Receiving Clinic Approval Status tab after reviewing the request details on the Transfer/ Discharge Request tab.

Field	Description
A) Status	The receiving clinic's supervisor accepts or rejects the transfer request.
B) Comments	Provide comments or a reason for the decision.
C) Approved / Rejected By	The name of the receiving clinic's supervisor goes here.
D) Assigned To	The receiving clinic's supervisor can assign the transferring client to a clinician in that location.



## NOTIFY TAB

Use the Notify tab to route the request to a supervisor for approval and to let the clinician, who made the original request, know if it has been approved or rejected.

The screenshot shows a software window titled "AVPMTEST (SAMPLE) - APPLE, ADAM (000000390) / Transfer/Discharge Request". The window has a menu bar (File, Edit, Favorites, Avatar PM, Avatar CWS, Help) and a toolbar. Below the toolbar, the patient information is displayed: "ADAM APPLE (000000390) Episode: 1 Client's Home Phone: 650-286-8466; Date Of Birth: 01/01/1984; Sex: Male". There are four tabs: "Transfer / Discharge Request", "Supervisor Authorization Status", "Receiving Clinic Approval Status", and "Notify". The "Notify" tab is active. It contains two main sections: "Send for Approval" with a list box containing "INGALL BULL" (checked) and "Send for Approval Outgoing Comments" with a text input field. A red letter "A" is positioned to the left of the list box, and a red letter "B" is positioned to the left of the text input field. At the bottom, there is an "Option" section with a "Complete" button and a "Chart Review" button.

Field	Description
A) Send for Approval	Select the staff member who needs to approve the request and also those who should be notified of the approval or rejection of the transfer/discharge request.
B) Send for Approval Outgoing Comments	Provide a comment or reason for the decision, particularly if there are special circumstances or reasons or if you are a supervisor rejecting the request.