

Transferring Clients Between Different Program Sites

When a program has different sites and there is potential for clients to transfer between sites under the same legal entity, there are certain documentation requirements which must be met. The following documentation must be completed to demonstrate that the receiving program has reviewed and accepted the documentation from the transferring program.

Assignments:

The clients must be appropriately assigned or transferred to the program where they will be receiving primary services.

CalAIM Assessment:

Intake CalAIM Assessment is completed as usual for the client, each client must have an active CalAIM Assessment. If the Assessment is current and accurate, this may be maintained by the transferring program with appropriate documentation in the client chart. If the client transfers to a different site location under the same Program Legal entity, a Client Non-Billable Note shall document the thorough review and acceptance of the transferring site's CalAIM Assessment. Example of Client Non-Billable Note below:

Our program maintains regional sites and the client transferred from xyz site, based on their service needs and site of preference. This writer reviewed the transferring site's Assessment to ensure it is current and accurate. Transferring site's CalAIM Assessment is accepted.

Diagnosis Document:

New program to complete a Diagnosis Document for date of admission to new program. Diagnosis Documents are program specific and required for billing services.

Authorization:

If the program requires authorization, the new program will need to submit a new authorization request to Optum that is specific to their program.

Care Plans, Treatment Plans, Interdisciplinary Treatment Plans and Problem List:

These will be maintained and reviewed by the accepting Program. Each client should have ongoing care planning documented in their chart from the first provided service. Problem list should be reviewed with the client and adjusted as necessary to align with the client's presenting symptoms and areas of concern.

Consents:

New consent forms must be completed with the client upon transfer to the new Program site.

CSI Standalone Collection:

The CSI Standalone Collection document must be reviewed and program to confirm the information is still accurate and up to date.

Outcomes:

The outcome measures should continue to follow the same timelines that were established at intake and maintained in the EHR.

Transfer of SAI/Primary site:

Maintain one chart at the client's primary site, if hybrid documents are included. If scanning into the EHR, the transferring site will have access to the scanned documents within the client's record.