

THE COUNSELING SOURCE, INC.

POLICY AND PROCEDURE

TITLE: Facility Transfer

PURPOSE: To establish the procedure to ensure that services are continued in the event that a client is transferred to another treatment or residential facility.

POLICY: Upon notification of transfer, the primary clinician will be responsible for initiating the facility transfer procedure to ensure continuity of care.

PROCEDURE:

Upon notification of planned transfer to a facility that the primary clinician serves, he/she will:

1. Ascertain from client if he/she wants to continue service. Do this either by talking with the client prior to a scheduled move or via phone at the new facility when transfer is made without prior notification.
2. If the client chooses to continue with services, contact the Charge Nurse of the new facility to obtain a physician's order for continued service
3. Resume services as soon as the physician's order is complete.
4. Make contact with the client within 14 calendar days of your notification of transfer.
5. Complete a Status Change form to indicate new facility name/address.

Upon notification of planned transfer to a facility that the primary clinician does not serve, he/she will:

1. Ascertain from client if he/she wants to continue service. Do this either by talking with the client prior to a scheduled move or via phone at the new facility.
2. If the client wants to continue, within 5 calendar days of your notification of the move (or impending move) email transfer@thecounselingsource.com regarding re-assignment of this client and provide the following information:
 - A. Client name
 - B. Current facility
 - C. New facility
 - D. Effective date of transfer
 - E. Clinician to whom the client is being transferred, if known.
3. The clinician will complete a Transfer Summary.

When the Intake Coordinator is notified of a client transfer to another facility, he/she will:

1. Ascertain if The Counseling Source, Inc. currently serves the facility.
 - A. If we do:
 1. Contact the lead clinician for that facility and provide the transfer information.
 2. Contact the Transferring Clinician with the new clinician's name.
 3. Contact the New Clinician to convey information related to transfer.
 4. Email the New Clinician the following documents:
 - A. Most recent Mental Health Evaluation (Diagnostic Assessment)
 - B. A populated Mental Health Evaluation worksheet
 - C. Most recent ISP
 - B. If we do not:
 1. Notify the Executive Director so he can contact that facility's administrator for permission to continue seeing the client.

- A. If permission is granted, the Executive Director will identify who will go to the facility to provide the service and inform the Intake Coordinator of the clinician assignment.
- B. The Intake Coordinator will then follow the procedure for notifying the new treating clinician and will forward the documents as outlined above.
- C. The new treating clinician will contact the Charge Nurse of the new facility to obtain a physician's order for continued services and resume treatment as soon as the order is received.
- D. If permission is not granted, the Executive Director will inform the clinician to contact the client to offer outpatient services.
- E. If the client chooses to continue services on an outpatient basis, the clinician will notify the Intake Coordinator to schedule the appointment.
- F. If the client does not choose to continue services on an outpatient basis, the clinician will complete a termination summary.

REFERENCED STANDARDS AND REGULATIONS:

Ohio Department of Mental Health Administrative Code 5122
CARF Behavioral Health Standards Manual

EFFECTIVE DATE: 2/25/2004

REVIEWED: February 2018