

# Resident Transfer SNF to AL in Same Database

For AL Staff when a resident transfers from a SNF to an AL that shares ECS.

If entering information/orders ahead of the resident's arrival:

1. From 'Main Menu,' select "Admissions," and then "Add/Update Client."
2. Click on "filter" on the bottom of the screen, and then select their current facility (where they are coming from) under site and service. *Note: This must be done by a user with rights to view residents in the facility that the resident is coming from.*
3. Click "OK" - The filter screen will close
4. Find the resident's name in the list and Right Click on it
5. Select "Locate" from the options that pop-up
6. Under "Status," click in the button for "Referral"
7. Select the AL name under both 'Site' and 'Service.'
8. Select any remaining filters that apply.
9. Click "OK" at the bottom of the screen.
10. Close the "Demographics" window.

You may now document in the resident's chart:

1. From 'Main Menu,' select "Admissions."
2. Then select "Admission" from the 'Face Sheet' column
3. Choose the resident by filtering for "Referral" under status, rather than "Active"
4. Proceed to document any information necessary for the resident, including the room number.
5. You may then filter for the resident under referral in the same way to begin entering physician orders or other pertinent information.

Once the resident arrives:

1. From 'Main Menu,' select "Admissions," and then "Add/Update Client."
2. Locate the resident in the list (may need to filter for 'referral')
3. Right click on their name and select "locate" from the options that pop-up.
4. Select "All History" from the bottom left corner of the dialogue box.
5. Ensure that the resident has a status of "inactive" at the facility they are coming from. *Note: If they do not, contact the transferring facility to complete this.*
6. Close the 'History' box.
7. Select "Active" under 'Status'
8. Select the AL under 'Site' and 'Service'
9. Select any remaining filters that apply.
10. Verify that the date in the upper left corner is the correct effective date (typically the day after the resident was inactivated by the SNF). *Note: A resident can not be 'Active' in more than one facility on one day. They will need to be inactive in the SNF on the day prior to being 'active' in the AL. Referral is the exception to this rule, which is why we use that status for documenting ahead of time.*

