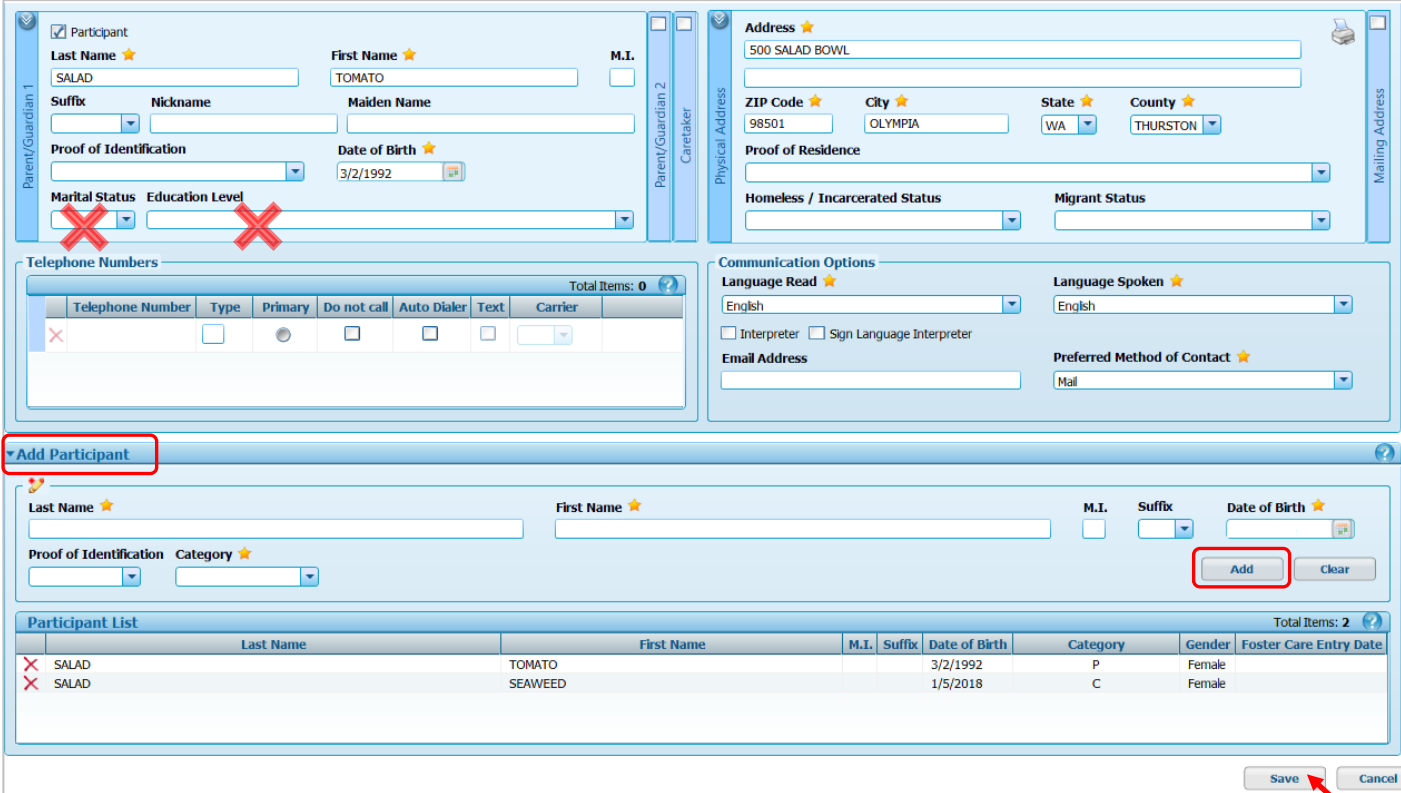# Cascades Steps
Transfer a Family into the Cascades System

Use this guide when you transfer a family into the Cascades system. The process is the same for transferring from a CIMS clinic or from out-of-state. Use Cascades Policy and Procedure Manual Volume 1, Chapter 21 Transfers/Verification of Certification to guide you.

- Remember to only transfer when the participant (or accompanying Parent Guardian) is in your clinic in person.
- If you need to transfer out of the Cascades system, use this Cascades Steps: Transfer Participants out of the Cascades System/Out of State
- If you need to transfer between two Cascades clinics, use this Cascades Steps: Transfer a Family Between Cascades Agencies or Clinics

Step	Cascades Screen
Step 1: Go to New Family screen. 1. In the menu bar, select **Family Services**, then **New Family**.	
Step 2: Start a record for the family. 1. Fill out all starred fields for the Parent/Guardian 1. 2. In the **Add Participant** container, complete the starred fields for the first participant. Select **Add**. 3. If you have additional participants in the family, fill out the **Add Participant** box again. Select **Add** after each addition. 4. Select **Save** once you've added all participants for this family.	

Step	Cascades Screen
Step 3: Go to Transfer → Into State. The system will move you to the **Family Demographics** screen. 1. In the menu bar, select **Family Services**, then **Transfer**, then **Into State**.	
Step 4: Complete VOC and Race/Ethnicity information for the first participant. 1. Fill out all required fields in the **VOC Information** and **Race/Ethnicity** sections. a. Choose **Declared** or **Observed** in the **Race/Ethnicity** section. WIC policy requires you to ask the participant. 2. Select the **Transfer In** button. 3. Three green dots and an "A" appear by the participant icon. This record is now active and ready for prescribing and issuing food benefits.	 **IMPORTANT** When you enter transferring pregnant participants to Cascades, the system doesn't allow certification end dates to be set beyond **six weeks past** the expected due date.

Step	Cascades Screen
Step 5: Complete VOC and Race/Ethnicity information for other participants of the family. 1. If the family has additional participants, select the icon for the **next participant** in the family carousel. 2. Repeat **Step 4** to transfer any remaining participants of this family into your clinic.	
Step 6: Scan the VOC in the Assigned Risk Factors screen. 1. Select the **Scan Document** button in the left bottom corner of the screen. 2. Title the scan, select your scanner, and select **Scan Page(s)** to scan VOC. Select **Save**. 3. Select **Save** to exit the **Assigned Risk Factors** screen.	

Step	Cascades Screen
Step 7: Complete the R&R Form. 1. In **Quick Links**, select **Certification Signature**. 2. Confirm that the **Rights and Responsibilities** box is check-marked. 3. Select **Capture Signature**.	

You can now proceed to work in this family's record according to policy.

- Review and document residency and identification for each person who transfers into this clinic.

- For each participant, enter risk factors from the VOC to the **Assigned Risk Factors** screen. You may not be able to add all risk factors. Cascades calculates "system-assigned" risks from information entered on other screens.

- Use Cascades Policy and Procedure Manual Volume 1, Chapter 21 Transfers/Verification of Certification to guide you for any additional transfer policy steps you may need for this family.

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