



Cascades Steps

Transfer a Family Between Agencies or Clinics



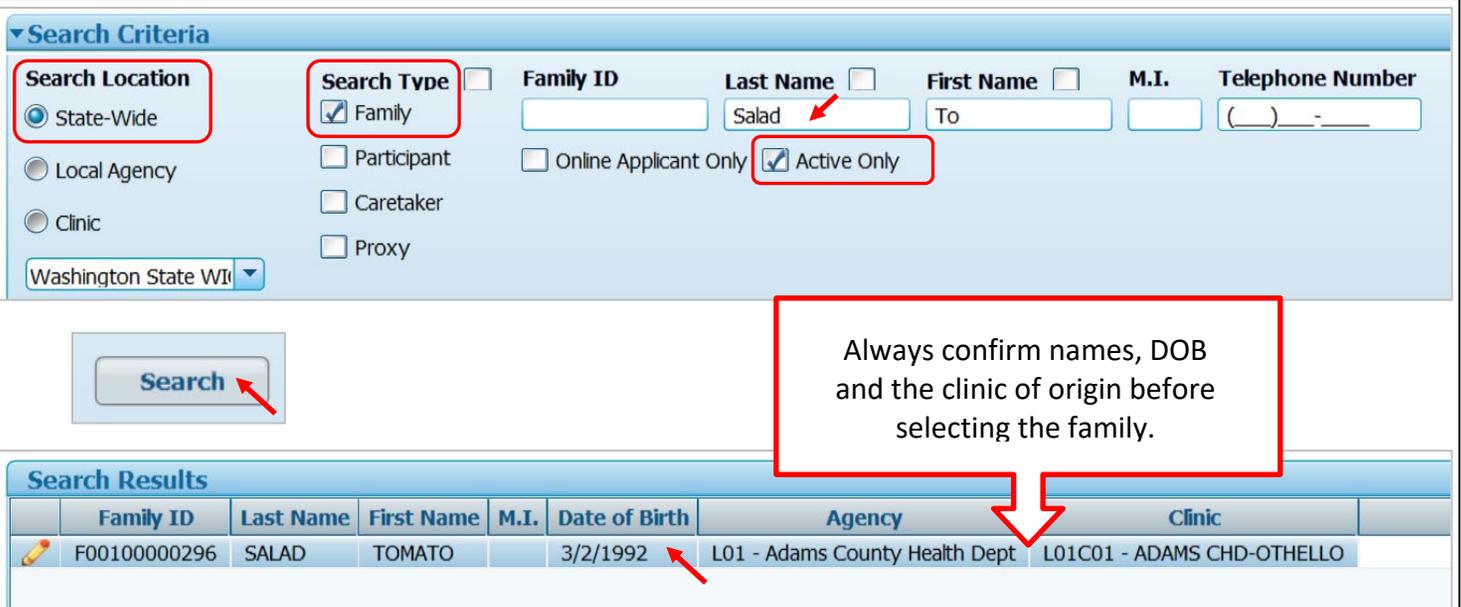
Use these steps when you transfer an **entire** family between two Cascades clinics. The process is the same for transferring between clinics from two agencies or clinics in the same agency.

- If your family’s participants are **expired**, you can transfer them in their expired state.
- If you need to transfer **individual** participants, not an entire family, see the Cascades Steps: [Transfer Between Families](#).
- If you need to transfer **in or out** of the Cascades system, please use these Cascades Steps:
 - [Transfer a Family into the Cascades System](#)
 - [Transfer Participants out of the Cascades System/Out of State](#)

REMEMBER

You can only “pull” families into the clinic you are logged into.

Only transfer when the participant (or accompanying caregiver) is in your clinic in person.

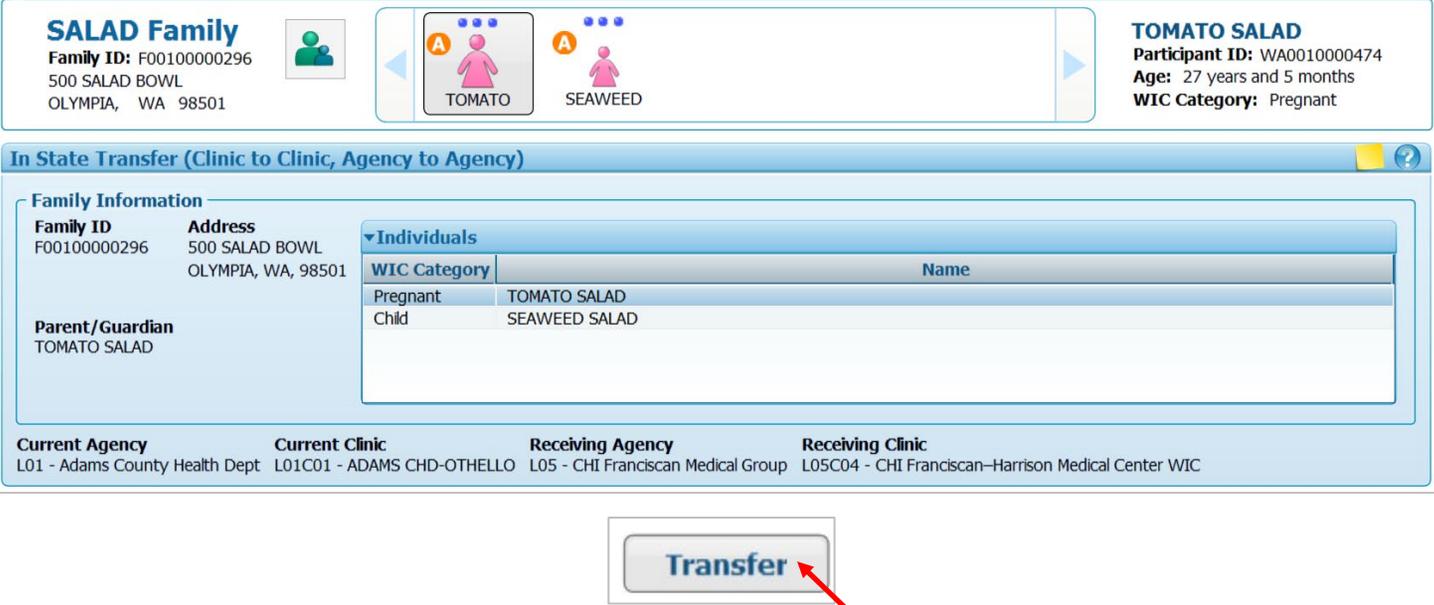
Steps	Cascades Screen
<p>Step 1. Go to Family Search.</p> <p>1. In the menu bar, select Family Services, then Family Search.</p>	
<p>Step 2. Search for the family you want to transfer into your clinic.</p> <p>1. Choose State-Wide as your Search Location.</p> <p>2. Leave Family check-marked in Search Type.</p> <p>3. Add a few letters or more to the Last Name and First Name fields.</p> <p>4. <u>Uncheck</u> Active Only.</p> <p>5. Select Search.</p> <p>6. In Search Results, double-click anywhere on the family’s line to open the family record.</p>	 <div style="border: 2px solid red; padding: 10px; margin-top: 20px;"> <p style="text-align: center;">Always confirm names, DOB and the clinic of origin before selecting the family.</p> </div>



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Steps	Cascades Screen								
<p>Step 3. Go to Transfer → Between Agency or Clinic.</p> <p>The system will move you to the Family Demographics screen.</p> <ol style="list-style-type: none"> In the menu bar, go to Family Services, then Transfer, then Between Agency or Clinic. 	 <p>The screenshot shows the 'Family Services' menu with 'Transfer' selected. The 'Transfer' dropdown menu is open, and 'Between Agency or Clinic' is highlighted with a red arrow.</p>								
<p>Step 4. Confirm information and transfer.</p> <ol style="list-style-type: none"> Confirm information on transfer screen with family. Select the Transfer button. 	 <p>The screenshot shows the 'In State Transfer (Clinic to Clinic, Agency to Agency)' screen. It displays family information for 'SALAD Family' and 'TOMATO SALAD'. The 'Transfer' button is highlighted with a red arrow.</p> <p>SALAD Family Family ID: F00100000296 500 SALAD BOWL OLYMPIA, WA 98501</p> <p>TOMATO SALAD Participant ID: WA0010000474 Age: 27 years and 5 months WIC Category: Pregnant</p> <p>In State Transfer (Clinic to Clinic, Agency to Agency)</p> <p>Family Information</p> <p>Family ID: F00100000296 Address: 500 SALAD BOWL, OLYMPIA, WA, 98501</p> <p>Parent/Guardian: TOMATO SALAD</p> <table border="1"> <thead> <tr> <th colspan="2">Individuals</th> </tr> <tr> <th>WIC Category</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>Pregnant</td> <td>TOMATO SALAD</td> </tr> <tr> <td>Child</td> <td>SEAWEEED SALAD</td> </tr> </tbody> </table> <p>Current Agency: L01 - Adams County Health Dept Current Clinic: L01C01 - ADAMS CHD-OTHELLO Receiving Agency: L05 - CHI Franciscan Medical Group Receiving Clinic: L05C04 - CHI Franciscan-Harrison Medical Center WIC</p> <p>Transfer</p>	Individuals		WIC Category	Name	Pregnant	TOMATO SALAD	Child	SEAWEEED SALAD
Individuals									
WIC Category	Name								
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<p>Step 5. Confirm transfer in the pop-up screen.</p> <ol style="list-style-type: none"> 1. In the In State Clinic to Clinic, Agency to Agency Transfer Confirmation pop-up screen, select OK to transfer this family. 2. A status message lets you know the transfer was successful. 	
<p>You can now proceed to work in this family's record according to policy.</p> <ul style="list-style-type: none"> • Review and document identification for each person who transfers to the new clinic. • The family won't have to sign another R&R when they transfer from one clinic to another within Cascades. The R&R electronic signature transfers with the participant's or family's file. • 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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To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

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