**Transferring Clients Between Different Program Sites**

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

**Assignments:**

If the program sites are under different unit numbers, open clients to unit where they are currently receiving services. If the client transfers to the other unit, they are to be transferred to that unit in CCBH.

If the program sites are under the same unit number, but different subunits, ensure that the documentation demonstrates services are being provided by the new subunit.

**BHA:**

Intake BHA is completed as usual, within 60 days of assignment. Regardless of the sites being under the same unit number or different unit number, if the client transfers to a different site, a Never Billable Progress Note shall be documented. The note shall include the review and acceptance of the transferring site’s BHA. Example of Never Billable Progress Note below:

*Our program maintains regional sites and the client transferred from xyz site, unit/subunit, based on their service needs and site of preference. This writer reviewed the transferring site’s BHA to ensure it is current and accurate. Transferring site’s BHA is accepted.*

**Client Plan:**

Intake Client Plan is completed as usual. For program sites under the **same unit number**, if client transfers to another site, from the original intake site, a Never Billable Progress Note shall be documented. The note shall include the review and acceptance of the transferring site’s BHA. Example of Never Billable Progress Note below:

*Our program maintains regional sites and the client transferred from xyz site, unit/subunit, based on their service needs and site of preference. This writer reviewed the transferring site’s Client Plan to ensure it is current and accurate. Transferring site’s Client Plan is accepted.*

If the sites are under **different unit numbers**, if the client transfers to the other site, in addition to the Never Billable Progress Note, the Client Plan must be **REVISED** to include the new unit number.

**Consents:**

As these forms are maintained in the hybrid chart, new forms must be completed with the client upon transfer to the other site.

**Outcomes:**

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

**Billing:**

If the sites are under the same unit, but different subunit, the client should be open to the unit/subunit at which they are currently receiving services.

If the sites are under a different unit, the client should be open to the unit at which they are currently receiving services.

**Transfer of SAI/Primary site:**

Maintain one chart at the client’s primary site. If the client fully transfers sites, then the chart will need to be transferred to the new site. If the client returns to the primary site, then original documents will be transferred to be included in the chart.