



Tips & Tricks

Transfers



When a patient is transferred from your agency to an inpatient facility, you need to complete either a transfer without discharge or a transfer with discharge. Your agency's internal policies should guide the decision of whether or not to discharge.

- **Transfer without discharge:** You might want to document a transfer without discharge if your patient spends a few nights in the hospital being treated for pneumonia.
- **Transfer with discharge:** You might document a transfer with discharge if your patient will go home after the hospital and doesn't want to continue home care services, or their condition has worsened, and they will stay in the hospital for an extended period of time to receive more intensive care.

Transfer without discharge

1. In the My Patient List Task, highlight the patient name.
2. Click **Schedule** task, and click  **Schedule**.
2. In the **Type** field, select SN - OASIS Transfer w/out DC and click  **Accept**.
3. In the new contact, use the available forms to complete your documentation.
4. On the Clinical Record Items form, select **6. Transferred to an inpatient facility - patient not discharged from agency** as the reason for the assessment.
5. When your documentation is finished, close the encounter.

Transfer with discharge

1. In the My Patient List Task, highlight the patient name.
2. Click **Schedule** task, and click  **Schedule**.
3. In the **Type** field, select SN - OASIS TRANSFER w/ DC and click  **Accept**.
4. In the new contact, use the available forms to complete your documentation.
 - Note that the form groups in this contact are different from the Transfer without Discharge contact. The additional forms help document discharge information.
5. On the Clinical Record Items form, select **7. Transferred to an inpatient facility - patient discharged from agency** as the reason for the assessment.
6. On the Inpatient Facility Admission or Agency Discharge form, select a discharge reason and enter any discharge instructions.
7. When your documentation is finished, close the encounter.