### PURPOSE

To define the requirements for the documentation of a patient transfer to another organization and/or internally to an affiliated organization.

### POLICY

All patients transferred from the organization will have a transfer summary completed and filed in the clinical record.

### PROCEDURE

1. A completed transfer summary will be sent within 2 business days of a planned transfer if the patient’s care will be immediately continued in a health care facility; or within 2 business days of becoming aware an unplanned transfer, if the patient is still receiving care in a health care facility at the time when Ohio Living Home Health becomes aware of the transfer.
2. The transferring clinician will complete a transfer summary that includes, as appropriate:
   1. The reason for transfer
   2. The physical and psychosocial status at the time of transfer, including specific medical, psychosocial, or other problems requiring interventions or follow-up
   3. Continuing symptom management needs
   4. Medication profile
   5. A summary of the care provided and the progress toward achieving goals
   6. Any instructions and/or referrals provided to the patient
   7. The existence of any Advance Directives known to the organization
   8. Date of face-to-face encounter, if during initial certification
   9. The date of transfer, which is the date of the last visit made
3. Completed transfer summaries will be given to a medical records clerk or designee who will send a copy to the receiving organization.
4. A copy of the transfer summary should be sent to the physician.