Cascades Steps
Transfer a Family Between Cascades Clinics

Use this guide when you transfer an **entire, active** 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**, **don’t complete a Subsequent Certification for** the participants at the clinic of origin. See page 4 of this Cascades Steps for how to proceed with expired participants.
- If you need to transfer **individual** participants, not an entire family, see [Understanding Foster and Non-Foster Transfers](#).
- 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

<table>
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<tr>
<th>Steps</th>
<th>Cascades Screen</th>
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<tbody>
<tr>
<td><strong>Step 1. Go to Family Search.</strong></td>
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<tr>
<td>1. In the menu bar, select <strong>Family Services</strong>, then <strong>Family Search</strong>.</td>
<td><img src="image" alt="Family Search Screen" /></td>
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<tr>
<td><strong>Step 2. Search for the family you want to transfer into your clinic.</strong></td>
<td><img src="image" alt="Search Criteria" /></td>
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<tr>
<td>1. Choose <strong>State-Wide</strong> as your <strong>Search Location</strong>.</td>
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<tr>
<td>2. Leave <strong>Family</strong> check-marked in <strong>Search Type</strong>.</td>
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<tr>
<td>3. Add a few letters or more to the <strong>Last Name</strong> and <strong>First Name</strong> fields.</td>
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<tr>
<td>4. Leave <strong>Active Only</strong> check-marked.</td>
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<tr>
<td>5. Select <strong>Search</strong>.</td>
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<tr>
<td>6. In <strong>Search Results</strong>, double-click anywhere on the family’s line to open the family record.</td>
<td></td>
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**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.

Always confirm names, DOB and the clinic of origin before selecting the family.
Step 3. Go to Transfer ➔ Between Agency or Clinic.

The system will move you to the Family Demographics screen.

1. In the menu bar, go to Family Services, then Transfer, then Between Agency or Clinic.

Step 4. Confirm information and transfer.

1. Confirm information on transfer screen with family.

2. Select the Transfer button.
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<th>Step 5. Confirm transfer in the Pop-up screen.</th>
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<tr>
<td>1. In the <strong>In State Clinic to Clinic, Agency to Agency Transfer Confirmation</strong> pop-up screen, select <strong>OK</strong> to transfer this family.</td>
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<tr>
<td>2. A status message lets you know the transfer was successful.</td>
</tr>
</tbody>
</table>

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

- 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.
What if this family has expired participants?
1. Don't complete a Subsequent Certification for the participants at the clinic of origin.
2. Instead, at your (= receiving) clinic location, start NEW records for these participants.
3. Contact Cascades Support to have them link each participants’ records. Support staff will need:
   - The clinic names of the clinic of origin and receiving clinic
   - The participant IDs for each record “pair”
   - Which record is to be marked “Primary”

For more guidance, see Staff Tool: Understanding Foster and Non-Foster Transfers.

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To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

DOH 961-1171 August 2019