**Cascades Steps**

**Transfer a Family Between Cascades 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 [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

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### Steps

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

Step 5. Confirm transfer in the pop-up screen.

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.

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

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