Cascade Steps
Transfer Participants out of the Cascades System

Use this guide when you transfer individual or multiple participants out of the Cascades system.
- The process stays the same for transferring out to a CIMS clinic or out-of-state.
- If you need to transfer into the Cascades system, use this Cascades Steps: Transfer a Family into the Cascades System
- If you need to transfer between two Cascades clinics, use this Cascades Steps: Transfer a Family Between Cascades Clinics

<table>
<thead>
<tr>
<th>Steps</th>
<th>Cascades Screen</th>
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<tbody>
<tr>
<td>Step 1. Go to Family Search.</td>
<td><img src="image" alt="Family Search Screen" /></td>
</tr>
<tr>
<td>1. In the menu bar, select Family Services, then Family Search.</td>
<td><img src="image" alt="Step 1 Screen" /></td>
</tr>
<tr>
<td>Step 2. Search for the family you want to transfer out of your clinic.</td>
<td><img src="image" alt="Search Criteria Screen" /></td>
</tr>
<tr>
<td>1. Leave your Clinic as the Search Location.</td>
<td><img src="image" alt="Search Results Screen" /></td>
</tr>
<tr>
<td>2. Leave Family check-marked in Search Type.</td>
<td>There’s no need to choose an individual participant now. You’ll be able to choose individual participants to transfer at a later point.</td>
</tr>
<tr>
<td>3. Add a few letters or more to the Last Name and First Name fields.</td>
<td></td>
</tr>
<tr>
<td>4. Leave Active Only check-marked.</td>
<td></td>
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<tr>
<td>5. Select Search.</td>
<td></td>
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<tr>
<td>6. In Search Results, double-click anywhere on the family’s line to open the family record.</td>
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</table>
### Cascades Steps

**Transfer Participants out of the Cascades System**

#### August 2019 – Cascades Steps: Transfer Participants out of the Cascades System

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<table>
<thead>
<tr>
<th>Step 3. Go to Transfer → Out of State.</th>
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<tbody>
<tr>
<td>The system will move you to the Family Demographics screen.</td>
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</tbody>
</table>
1. In the menu bar, go to **Family Services**, then **Transfer**, then **Out of State**.

<table>
<thead>
<tr>
<th>Step 4. Select family members you want to transfer.</th>
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</table>
1. Confirm information on the transfer screen with the family. |
2. In the **Individuals** container, check-mark the boxes next to the individual participants you want to transfer out of the Cascades system. |
3. **DON'T PRESS THE TRANSFER BUTTON!** |
4. Instead, press the Print VOC button. |

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**What happens if you press “Transfer”?**

If you select the **Transfer** button, it terminates the participant(s) and their food benefits.
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Step 5. Add optional comments or instructions to VOC.

1. In the pop-up Print Out of State Transfer Documents screen, add optional comments or instructions.

2. Select the Print button.

3. Print the VOC and sign it.

4. On the Out of State Transfer screen, select the Cancel button.
   - Don’t press Transfer!

5. On the pop-up Save Changes? screen, select No, because you don’t want the Cascades system to transfer the participants.
Optional Step: Add a Family Alert.

- A family alert can help you manage caseload.
- This way you don’t call participants who have transferred out.

1. In Quick Links, select **Family Alerts** (in the **Certification** section).
2. Select the **Add** button.
3. Add the certification end date as the alert’s end date.
4. Once your note is complete, select **Save**.

- Leave the participant(s) record(s) as **Active**.
- Let the system expire the certification.
- At this time, you don’t have to track participants who need to be terminated.

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For persons with disabilities, this document is available on request in other formats.
To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

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