COBB COUNTY COMMUNITY SERVICES BOARD
DOUGLAS COUNTY COMMUNITY SERVICES BOARD

Policy # 8094	Transfer of Clinical Information
Origination Date: February 1998	
Revision Date: February 2004; March 27,2006; March 12, 2009, August 23, 2010, October 4, 2012	
Reviewed Date: April 2005; June 14, 2007, May 1, 2013, July 14, 2016	
Approved: Bryan G Stephens LPC Bryan G. Stephens Interim Executive Director	Jamie L. Allison, MA, LPC Jamie Allison, Chief Quality Officer

POLICY:

It is the policy of the Cobb County Community Services Board and the Douglas County Community Services Board to provide appropriate care and exchange clinical information when clients are admitted, transferred, or discharged to another service provider to ensure continuity of care.

PROCEDURES:

1. The following information is exchanged to ensure continuity of care:
   a. The reason for transfer, referral or discharge.
   b. Status at the time of transfer, referral or discharge.
   c. A summary of services and care provided and progress made toward achieving goals.
   d. Medications, instructions and names of referrals given to the client.
2. Referrals (requests for evaluations and services provided outside the agency) can be initiated by clients or by a staff member to terminate agency services or to offer treatment outside the professional domain of the agency. Staff members are encouraged to confer with their clinical supervisors regarding referral sources. (Clients should understand that the agency is not accountable for referral services.)
3. The above procedures need to be documented as a progress note in the clinical record by the referring staff member.
4. A Release of Information (ROI) should accompany referrals and requests for information. Medical Records will handle sending/requesting the information from the client's clinical record (electronic and paper) to the new service provider upon receipt of the ROI. Documentation of what Medical Records has sent/requested will be placed in the Message Board of the client's ECR (see Policy #5036) and the paper ROI form will be filed/scanned into the client's record.