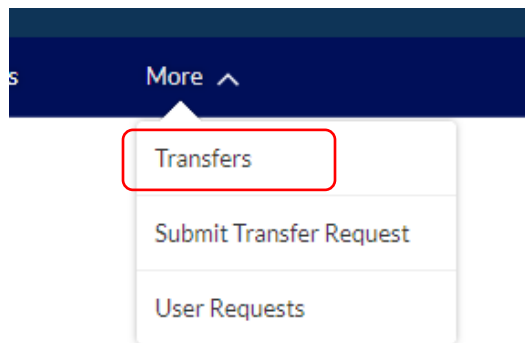


# Locating Transferred Documents in the Portal

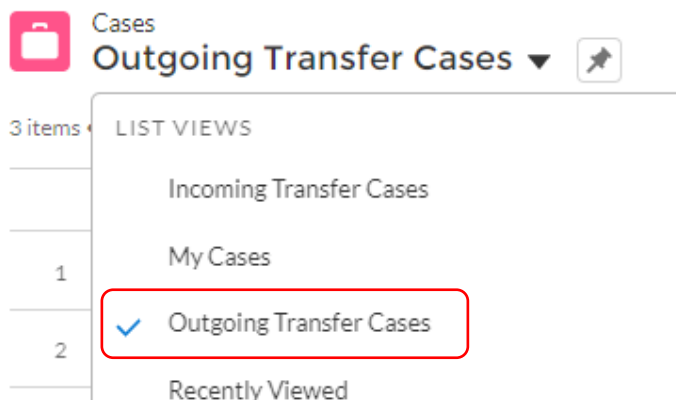
When a nursing facility resident is transferring from one facility to another facility, their PASRR documents can be transferred via the portal. This guide provides directions on how to access these documents.

## Outgoing Transfers:


To access documents transferring to another facility from your facility, log into the portal, click on “More” on the home screen, and select “Transfers” from the dropdown.




Click on “Cases”, and from the dropdown, select “Outgoing Transfer Cases.”



A list of outgoing transfer cases will be displayed.

 Cases

**Outgoing Transfer Cases** ▼ 

5 items • Sorted by Case Number • Filtered by All cases - Type • Updated a few seconds ago

	Cas... ↑ ▼	Contact Na... ▼	Subject
1	00002403	Southcoast User	<a href="#">Outgoing Facility Transfer Request for Betty ..</a>
2	00002406	Southcoast User	<a href="#">Outgoing Facility Transfer Request for Betty ..</a>
3	00002407	Southcoast User	<a href="#">Outgoing Facility Transfer Request for Turkey.</a>

Click on the Case ID you want to open to open the transfer record.

3	<b>00002407</b>	Southcoast User	<a href="#">Outgoing Facility Transfer Request for Turkey.</a>
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Opening the record will display the Case Details. Below the details, you will find the “Additional Information” section.

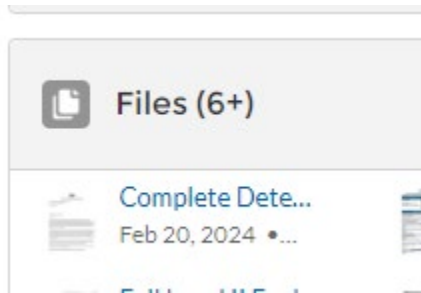
▼ **Additional Information**

Status	Type
Closed	Outgoing Notification Facility Tra
Case Origin	Case Reason
PASSR Portal	
Priority	
High	
Subject	
Outgoing Facility Transfer Request for Turkey Sandwich	
Description	
This is to Notify you that Patent Name Turkey Sandwich has requested to be transferred from your healthcare facil Boston Neighborhood Health Center.	
You have until February 26, 2024 to download all files related to the Individual. Files can be found on the right-hand	
Internal Comments	
Date/Time Opened	Date/Time Closed
2/21/2024, 9:13 AM	2/26/2024, 12:00 AM
Web Email	Web Company

In the “Description” field, you will see this message:

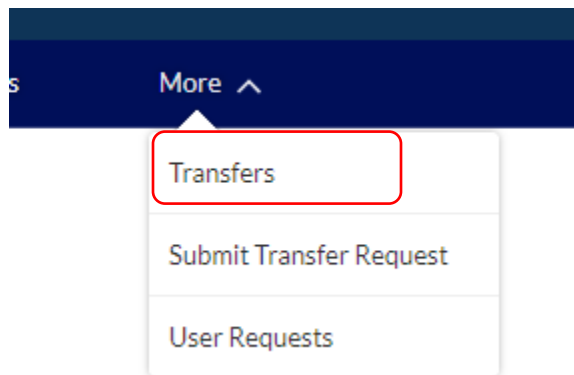
Description
This is to Notify you that Patent Name Turkey Sandwich has requested to be transferred from your healthcare facility: Southcoast Behavioral Health to East Boston Neighborhood Health Center.
You have until February 26, 2024 to download all files related to the Individual. Files can be found on the right-hand side of this record.

On the right side of the screen, you will see the listing of documents located under “Files”. It’s important to note you have five days to download the documents for your records. After five days, you will no longer be able to access these documents.

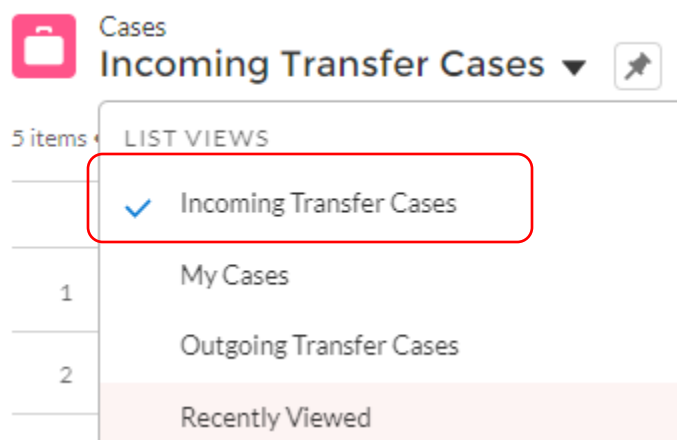


## Incoming Transfers:


To access documents for nursing facility residents transferred to your facility, log into the Portal, click on “More” from the home screen, and then select “Transfers” from the dropdown.




Click on the “Cases” tab and from the dropdown, select “Incoming Transfer Cases.”



A list of incoming nursing facility residents transferring to your facility will be displayed.


 Cases

**Incoming Transfer Cases** ▼ 

5 items • Sorted by Date/Time Opened • Filtered by All cases - Type • Updated a few seconds ago

	Case ... ▼	Contact Na... ▼	Subject ▼	St... ▼	Date/Time Op... ▼
1	<b>000024...</b>	Southcoast User	<a href="#">Facility Transfer Request for Martin ...</a>	Closed	2/21/2024, 10:24
2	000024	Southcoast User	<a href="#">Facility Transfer Request for Martin</a>	Closed	2/20/2024 3:33 P

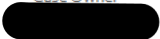



Clicking on the “Case Record” here will only provide you with the details of the transfer.

 Case


**Facility Transfer Request for Martin Martian**

Priority: Low      Status: Closed      Case Number: 00002410

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Case Owner	Contact Phone
	<a href="#">888-000-0000</a>
Case Number	Contact Email
00002410	
Contact Name	New HCO
<a href="#">Southcoast User</a>	<a href="#">Sout</a> 
Account Name	Old HCO
<a href="#">Martin Martian</a>	<a href="#">East</a> 
	Access Expiration

Click on the transferring nursing facility resident’s Account Name to access the individual’s account.

[South](#) 

---



Account Name

[Martin Martian](#)

Once in the nursing facility resident’s account, click on the “Related” tab.

DETAILS      **RELATED**

Scroll down to see the documents listed under the “Level 1 Referrals” and “Level 2 Evaluations” boxes (in this example, only an EHD positive Level 1 is transferring; therefore there is no Level 2).

	Level 1 Referrals (Account) (1)
Level 1 Form ID	
<a href="#">L1-034420</a>	
	Level 2 Evaluations (Individual Account) (0)