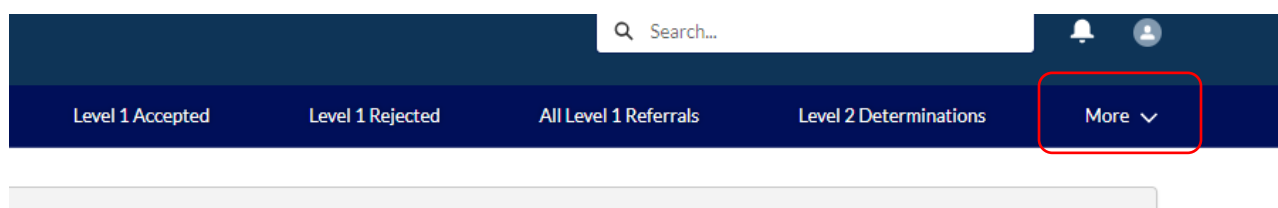


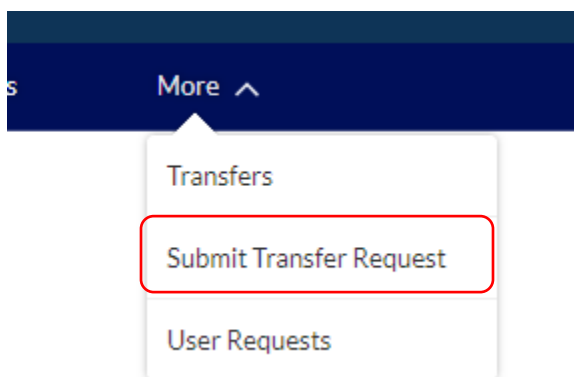
How to Request a Transfer of Documents in the System

Using the Portal, Health Care Organization (HCO) users can request a transfer of the most recent Level 1 and Level 2 documents for an individual moving from one HCO to another HCO.

1. From the Home Screen, Click on “More.”



2. Click on “Submit Transfer Request.”



3. To complete the next step, you will need the individual's first and last name and date of birth. The name and date of birth must be an exact match to those in the portal. Click on “Next.”

A screenshot of a form used for submitting a transfer request. At the top, there is a dark blue header bar. Below it, a light gray box contains two lines of instructional text: 'Before you begin the request to transfer an individual to another Healthcare Organization, please note that this process is not immediate and may require time to complete the transfer.' and 'You will need the First Name, Last Name, and Date of Birth to proceed. If there are no records with an exact match to the information you have entered, you will not be able to proceed.' Below the text is a large, empty white rectangular area for input. In the bottom right corner of the form, there is a red button with the word 'Next' in white text, which is highlighted with a red rectangular box.

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4. In the appropriate boxes, enter the individual's first name, last name, and date of birth and click "Next".

▼ Contact Details

* First Name

Betty

* Last Name

Rubble

* Birthdate

Apr 5, 1956

Previous

Next

****Please note that if there are spaces before or after either the first or last name, the system counts these as characters and will give you the message:***

Sorry, we could not find any matches with the following values in our Database.


If this message appears, click on "Try Again" and remove any spaces.

Try Again

5. Once spaces are removed, click “Next”.
6. Choose the facility the individual is transferring from using the drop-down list. Once both facilities are entered, click “Next”.


Thank you for entering the information. There are records in the system that match this individual.



* Facility Transferring from

Search Accounts... 

Complete this field.

* Facility Transferring to

 [Redacted] Search 

7. To complete the transfer request, click on “Finish.” The PASRR team will review your request.

Transfer request submitted successfully!
Click 'Next' to request an additional transfer

[Previous](#) [Finish](#)