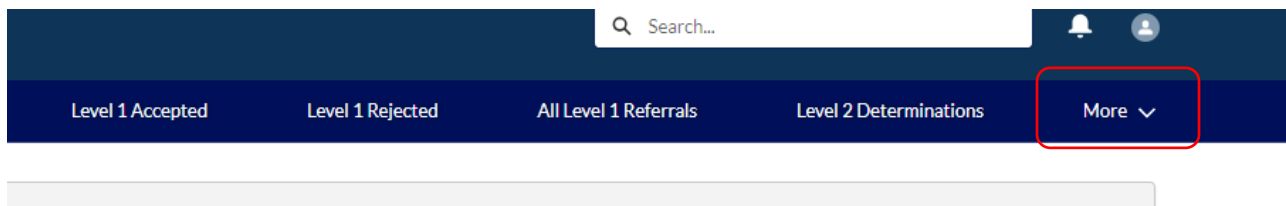


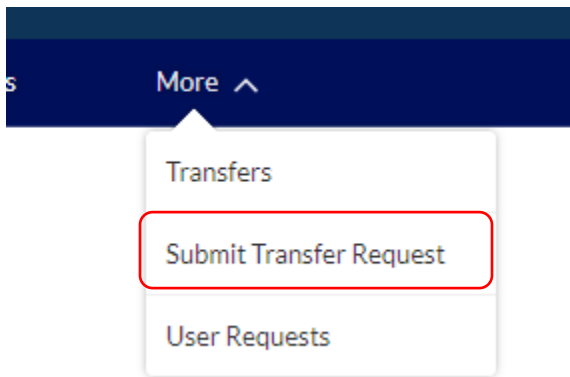
How to Request a Transfer of Documents in the System

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.

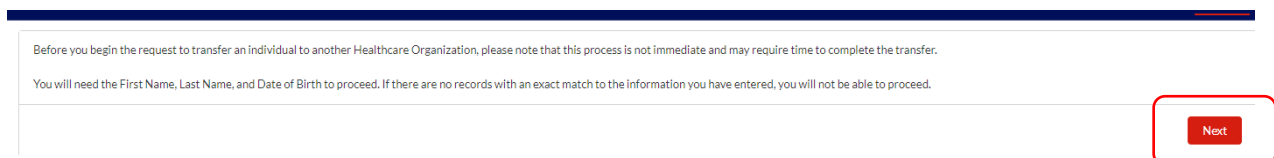
1. From the Home Screen, Click on “More.”



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.”



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... Q

Complete this field.

* Facility Transferring to
Search... x

Previous Next

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