

## F624

(Rev. 208; Issued:10-21-22; Effective: 10-21-22; Implementation:10-24-22)

### §483.15(c)(7) Orientation for transfer or discharge.

**A facility must provide and document sufficient preparation and orientation to residents to ensure safe and orderly transfer or discharge from the facility. This orientation must be provided in a form and manner that the resident can understand.**

#### DEFINITIONS

**“Transfer and Discharge”:**Includes movement of a resident to a bed outside of the certified facility whether that bed is in the same physical plant or not. Transfer and discharge does not refer to movement of a resident to a bed within the same certified facility. (See §483.5) Specifically, transfer refers to the movement of a resident from a bed in one certified facility to a bed in another certified facility when the resident expects to return to the original facility. Discharge refers to the movement of a resident from a bed in one certified facility to a bed in another certified facility or other location in the community, when return to the original facility is not expected.

#### GUIDANCE

The guidance at this tag addresses the immediate orientation and preparation necessary for a *facility-initiated* transfer, such as to a hospital emergency room or therapeutic leave where discharge planning is not required because the resident will return, or for an emergent or immediate *facility-initiated* discharge where a complete discharge planning process is not practicable. For concerns related to how the facility planned for a discharge that meets a resident’s health and safety needs, as well as their preferences and goals in circumstances which permit a complete discharge planning process, please refer to F660, Discharge Planning.

Sufficient preparation and orientation means the facility informs the resident where he or she is going, and takes steps under its control to minimize anxiety. Examples of preparation and orientation may include explaining to a resident why they are going to the emergency room or other location or leaving the facility; working with family or resident’s representative to assure that the resident’s possessions (as needed or requested by the resident) are not left behind or lost; and ensuring that staff handle transfers and discharges in a manner that minimizes anxiety or depression and recognizes characteristic resident reactions identified by the resident’s assessment and care plan.

The facility must orient and prepare the resident regarding his or her transfer or discharge in a form and manner that the resident can understand. The form and manner of this orientation and preparation must take into consideration factors that may affect the resident’s ability to understand, such as educational level, language and/or communication barriers, and physical and mental impairments. The facility must also document this orientation in the medical record, including the resident’s understanding of the transfer or discharge.

Other tags for consideration would be:

- F622, Transfer and Discharge Requirements, specifically the clinical information that must be conveyed to the receiving provider, if the transfer or discharge is to another healthcare setting; and
- F843, Transfer Agreement, for concerns related to timely transfer to the acute care

facility.

## **PROCEDURES**

- Review nursing notes and any other relevant documentation to see if appropriate orientation and preparation of the resident prior to transfer and discharge has occurred. Through record review and interviews, determine if the resident received sufficient preparation prior to transfer or discharge, and if they understood the information provided to them.
- Were the resident's needed/requested possessions transferred with the resident to the new location?

Ask resident or his or her representative if they understand why the transfer or discharge occurred.