FAQ – Service User Transfer – Included and Excluded Data

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When a **Service User Transfer** is completed by our 3rd line team, selected information from the resident's record is transferred to support continuity of care.

To ensure accuracy, data protection, and system compatibility, **only specific areas are included** in the transfer. Some sections are **intentionally excluded** and must be reviewed or recreated manually if required.

For audit and traceability purposes, the staff member who initiates the internal transfer will be recorded as the creator of the transferred records in the destination site. The original records and their history remain unchanged in the source site.

Please note: Service User Transfer is different from Day Care Transfer and uses a different template. Also, Personal Care isn't available for Day Centre. Day Centre doesn't transfer a person's record or care plan to another site — it simply allows them to be visible on a selected site for a set period, while their care plan remains on the original site.

The following areas are included

- Care Planning (Resident Care Plans)
  - Essentials
    - Personal Details
      - Personal Details
      - Further Details
      - Additional Fields *
      - Personal Appearance
    - About Me
    - Key Contacts
    - Care Notes
    - Care Reviews
    - Food, Drink & Nutrition
  - Medical
    - History / Diagnoses
    - Medication Profile
    - Medication Creams
    - Health Issues
    - Professional Contacts
  - Other Areas
    - Life History
- Admin
  - Client Area
    - Personal Allowance
- Staff
  - Staff personal information (name, contact information etc.)
  - Primary Role
  - Security Information (PIN, Basic Care Editing etc.)

The following areas are not included

- Care Planning (Resident Care Plans)
  - Summary
    - Fact Facts
  - Essentials
    - Personal Details
      - Impairments
    - Risk Assessments
    - Consent and Capacity
      - Resident Consents
      - Mental Capacity Assessments
    - Checklists
  - Medical
    - EMAR
  - Analysis
    - Monitoring
      - Monitoring Analysis
  - Other Areas
    - Linked Documents
    - Personal Belongings
    - Memory Box
    - Activities
- Admin
  - Communication
    - Custom Tasks

Why Some Information Is Not Transferred

Some areas of a service user’s record are intentionally excluded from the Service User Transfer. This is to ensure information remains accurate, legally compliant, and appropriate for the new

care setting.

Time-Specific or Legally Sensitive Information

Certain records are valid only at a specific point in time or are closely linked to legal responsibility. Transferring these without review could result in outdated or invalid information being relied upon.

Examples include:

- Mental Capacity Assessments
- Consent and Capacity records
- Resident Consents

These must be **reassessed and re-recorded** in the new cars setting to reflect current circumstances, legal accountability, and decision-making arrangements

Information Dependent on Local Processes or Reassessment

Some areas of care planning and administration are shaped by the policies, procedures, and risk management approaches of an individual service or provider.

Examples include:

- Risk Assessments
- Impairments
- Checklists
- Custom Tasks

Because these may vary between organisations, transferring them directly could lead to **misalignment with local practices**. Recreating them ensures they are completed in line with the receiving service’s standards and responsibilities.

Historical, Analytical, or Document-Based Data

Certain information is designed for ongoing monitoring, historical reference, or internal analysis rather than direct care delivery in a new setting.

Examples include:

- Monitoring and Monitoring Analysis
- Linked Documents

• Activities records
• Memory Boxes
• eMAR data

This information often requires **review, validation, or selective re-entry** to ensure relevance and accuracy, rather than being transferred in bulk.

Summary

Excluding these areas helps to:
• Protect service users and providers legally
• Prevent reliance on outdated or inappropriate information
• Ensure care records are accurate, current, and tailored to the new service

All excluded areas remain accessible in the original record and can be reviewed and re-created where appropriate following the transfer.

What Customers Should Do After a Transfer

• Review all transferred information for accuracy
• Re-complete excluded assessments where required
• Upload or recreate documents and monitoring data as appropriate

Was it helpful ?

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