This article concerns which function under Admin to use when you need to change a chart number: **Shift** or **Switch**

Switch Chart #s changes the chart number from one number to another and is the best one to start with if a chart number needs to change.

Shift a Chart # is used when it is determined later that a patient has changed payers. Shift will shift the data (COPY ICD codes, surgeries, facility stays, med history, and OASIS; MOVE visits, supplies, a/r, verbal orders, 485s) from one chart# to another. NOTE: SHIFT is difficult to correct, so please be sure that you need to perform a shift, and that you have the correct old and new numbers, before you do it.

Switch Chart #s: Barnestorm Office > Admin > Shift a Chart#

Use this feature if you created a referral with an incorrect chart number and you need to change it.

1. From **Barnestorm Office** > **Admin** > **Switch Chart#'s**
2. Search for the patient by entering their name or the incorrect chart number in the Old Chart# field.
3. Enter the new six digit chart number that you want to use or click on **Get Next Chart #**.
4. Click on the **Validate** button.
5. If every thing is good to change then the **Save** button will appear.
6. Click on Save. A list of items that were changed will appear (ex. Referral, ICD codes).

Shift a Chart#: Barnestorm Office > Admin > Shift a Chart#

Shifting a chart number is normally done when a patient has changed insurance, but only if there is a lot of information to move to the new chart number (ICDs, visits, supplies, 485, OASIS)**.**

Shifting the chart number is only one step in the process that should be completed when a patient's insurance changes. Please see the article for **Change a Patient's Insurance** for the full process.

The following data will be copied, moved or deleted:

- COPY icd codes, surgeries, facility stays, med history, and OASIS to new chart;
- MOVE visits, supplies, a/r, verbal orders, 485s from old to new chart;
- DELETE PPS Tracking from old chart (will not copy to new)

*NOTE: SHIFT is difficult to correct, so please be sure that you need to perform a shift, and that you have the correct old and new numbers, before you do it.

Filling in the screen:

1st **Patient** field: The TOP chart is the one that has the information NOW. This chart is sending its information to the other chart.

2nd **Patient** field: The BOTTOM chart is the one you want to send the information to. This chart is receiving the information from the TOP chart.

From/Thru fields: Put in the date range of the data you want to shift.

Verify Data to be Copied/Moved: Click this tab, after putting in the patients and desired date range. A list will appear showing you how many items for each screen is currently in the top chart/bottom chart.

After you verify that everything looks correct click **Change the Data**. A report will appear for you to print which items were added, moved or deleted.

Knowledgebase
http://kb.barnestorm.biz/KnowledgebaseArticle50136.aspx