

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:

## Shift a Chart Number vs Switch Chart #s

- 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>