MFT Program Policy on Transferring Clients

Policy Availability

The **Policy on Transferring Clients** is available to the public via the MFT Homepage > Accreditation > Policies and Handbook.

Transferring Clients from One Therapist to Another

When second year students finish their clinical rotation and prepare to graduate, they may have clients on their caseloads who wish to continue therapy. To meet the highest standard of care for our clients, the process by which clients are transferred from one therapist to another must be clear, rigorous, regimented, and formal. Each practicum supervisor will assign a day to discuss the transferring process as well as provide supervision for cases being transferred. These clients will be transferred to rising 2nd year Early Start Practicum (ESP) students in Summer practica.

Process

- Begin planning 8 weeks before the end of the semester.
- Rising therapists (often ESP students) observe, meet clients, and co-conduct transfer sessions before assuming the case.
- Complete and submit the **Client Transfer Form** and **Case Presentation Form**.
  1. Students and supervisors should start talking about transferring cases around about 8 weeks before the end of the semester so that there is adequate time to have thoughtful discussions, find a new therapist(s), and enable the new therapist(s) to have at least 3 sessions with the client and the transferring therapist(s).
  2. All practica syllabi will include a section on "Transferring Clients" in the course schedule or point students to this policy. For the Spring/Fall semesters, this discussion should be listed for the week after midterm, and for the Summer semester, this discussion should be listed for the first day of the course for cases that were transferred into the summer practicum from previous practica. New cases should be taken up for discussion at least 4 weeks before the end of summer practicum.
  3. To ensure that all interns are prepared for this process, therapists will read *Guidelines for an Effective Transfer of Cases: The Needs of the Transfer Triad* (Williams & Winter, 2009). Therapists will discuss this article and review the steps to complete a successful transfer at the following times:
     - Spring and Summer practicum
     - Early Start Practica (ESP) Student Meeting
     - Professional Issues course
     - Second-year orientation meeting
  4. Transferring therapist(s) must maintain their case load for no less than two weeks before the end of the summer practicum.
  5. Each MFT intern will complete and submit the *Client Transfer Form*. This form will be completed in stages as the therapist and supervisor make decisions about the clients, and when/how they will be transferred. The Transferring form should be completed by both

the transferring therapist(s) and the rising (incoming) ESP therapist(s) to track the cases being transferred and engage both therapists in the process.

6. Supervisors must sign off on all transfers to ensure that the process has been correctly followed.
7. If therapist(s) are unable to reach clients with open files who have not attended therapy for a few weeks but who indicated a wish to continue therapy, the transferring therapist(s) must properly inform the client by using the *Transferring Letter Template.*
8. If the transferring therapist(s) was seeing a client who is currently unreachable (phone turned off, not returning messages from therapist, etc.), the therapist will send the client a letter using the *"Closing/Therapist Leaving"* letter template.

Steps to Transferring a Case to a Rising (incoming) Therapist

1. Inform both the Clinical Coordinator and your supervisor, if/when a graduating student has been asked to transfer a case to you.
2. Once you receive your supervisor's or the Clinical Coordinator's approval, you may start the transfer process. Keep the supervisor updated as you go.
3. Before you take possession of the case, have a meeting to discuss the case (case presentation is given by the transferring therapist) and to respond to the questions posed on the transferring form.
4. The transferring therapist(s) will be having conversations with the client(s) about the transferring process prior to having you meet the client(s) or observe the case. Ask the transferring therapist about these conversations—how the client is responding, how they are orienting to a transfer of therapist, etc.
5. Watch a session or two on VALT, meet the client, observe (behind the mirror and in the room) at least twice, and engage in a transferring session in which all parties are present before the transferring therapist comes off the case. This process can be adjusted to best fit a particular case with supervisor/clinical manager permission.

If a Rising Therapist is Not Available to Take the Case

If a rising therapist is unable/unavailable to take a client in need of transfer, therapists will instead talk with clients about taking a break from therapy until the new semester begins in August.

- Clients may pause therapy until the next semester: The Clinical Coordinator keeps a running list of clients who wish to take a break but return in August. If a client would like to be put on the list, we will check back in with them in August.
- Clients on the Return to FamilyWorks List will be contacted by their new therapist as soon as the new semester begins.
- If your client wishes to see a private practitioner, direct your client to the link on the MFT webpage that lists VSU MFT Graduates in private practice. Let clients know that therapists in private practice will charge a fee or bill insurance, although some may offer reduced rates. Remind them that they are always welcome to return to FamilyWorks at any time.

Best Practices

– Hold formal transfer conversations (not casual exchanges).
– Avoid overloading ESP students with too many cases early on

- Maintain flexibility to fit client needs.