



EHM

Case Transfer

Document History

Date	Version	Produced By	Comments
23/01/2017	1.0	Lynn Parsons	Created

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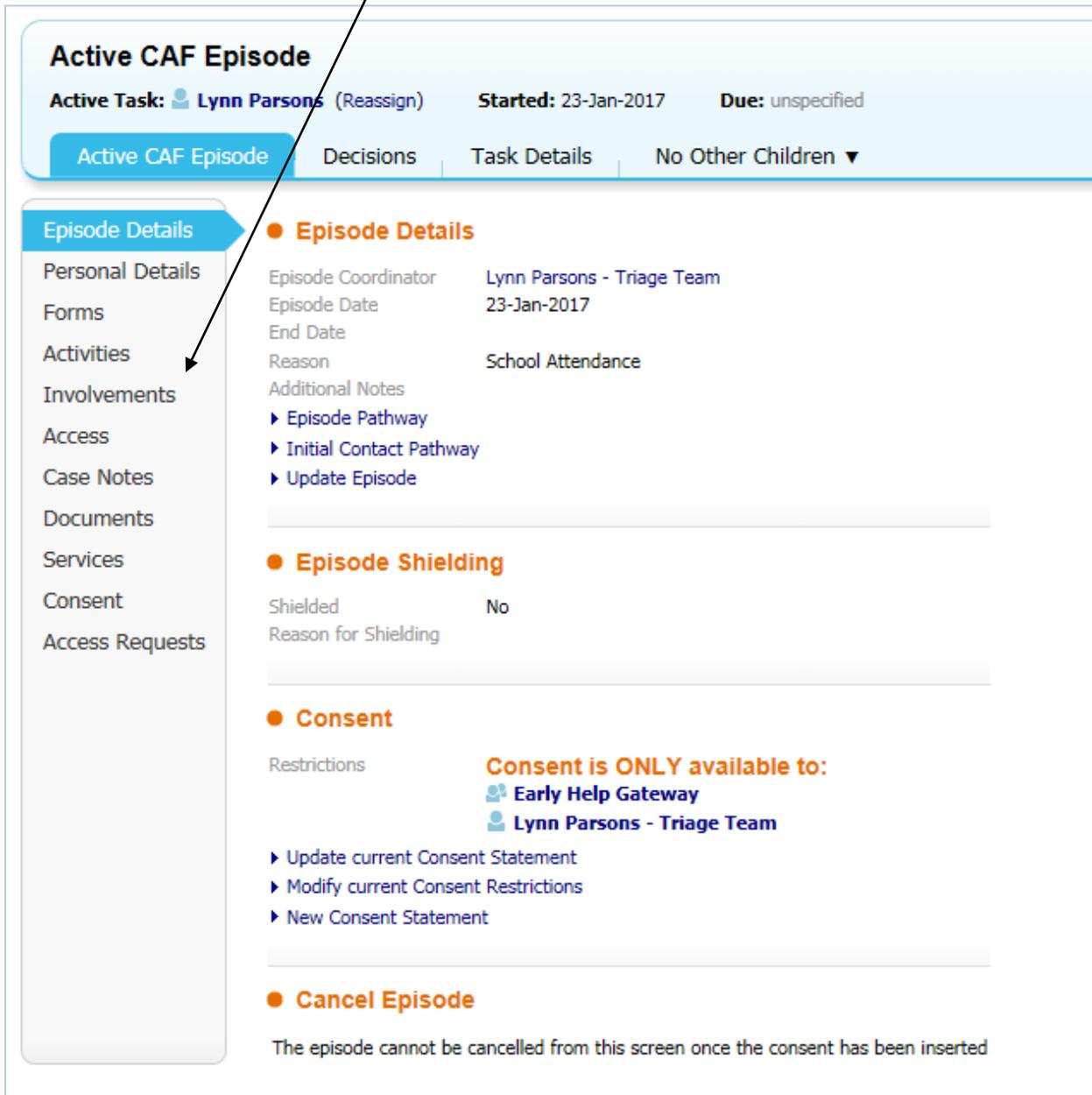
Case Transfer

A Case can be transferred at any point as long as there is an Active Episode.

To transfer a Case you must be the Episode Coordinator.

Transferring a Case

From the **Active Episode** select Involvements



The screenshot displays the 'Active CAF Episode' interface. At the top, it shows the active task assigned to Lynn Parsons (Reassign), with a start date of 23-Jan-2017 and an unspecified due date. Below this are navigation tabs: 'Active CAF Episode', 'Decisions', 'Task Details', and 'No Other Children'. A left-hand sidebar menu lists various options: Episode Details, Personal Details, Forms, Activities, Involvements, Access, Case Notes, Documents, Services, Consent, and Access Requests. The 'Involvements' option is highlighted with a blue arrow pointing to the 'Involvements' menu item. The main content area is divided into sections: 'Episode Details' (listing Episode Coordinator as Lynn Parsons - Triage Team, Episode Date as 23-Jan-2017, End Date, Reason as School Attendance, and Additional Notes with sub-options for Episode Pathway, Initial Contact Pathway, and Update Episode); 'Episode Shielding' (showing Shielded as No and Reason for Shielding); 'Consent' (showing Restrictions as 'Consent is ONLY available to: Early Help Gateway and Lynn Parsons - Triage Team' with sub-options for Update current Consent Statement, Modify current Consent Restrictions, and New Consent Statement); and 'Cancel Episode' (with a note: 'The episode cannot be cancelled from this screen once the consent has been inserted').

The following screen will be displayed:-

Active CAF Episode
Active Task: Lynn Parsons (Reassign) **Started:** 23-Jan-2017 **Due:** unspecified

Active CAF Episode Decisions Task Details No Other Children ▼

Episode Details
 Personal Details
 Forms
 Activities
Involvements
 Access
 Case Notes
 Documents
 Services
 Consent
 Access Requests

● Involvements

Role	Worker or Team	Start Date	End Date
Episode Coordinator	Lynn Parsons	23-Jan-2017	
Other Role	Early Help Gateway	23-Jan-2017	

● Current Tasks for this Person

Assigned	Subject	Date Started	Due Date	From
Lynn Parsons	CAF Assessment - Please complete CAF Assessment for Person	23-Jan-2017 15:17		Lynn Parsons
Lynn Parsons	Active CAF Episode	23-Jan-2017 15:17		Lynn Parsons
Lynn Parsons	CAF Assessment	23-Jan-2017 15:17	23-Jan-2017	Lynn Parsons

● Case Transfers

List is empty

[▶ Initiate Case Transfer Process](#)

Click on the **Initiate Case Transfer Process** link at the bottom of the screen.

The ECAF Transfer Screen will be displayed:

Information **Case Transfer** Consolidation Revisions

Print

ECAF Case Transfer
 This process has been designed to facilitate the smooth and safe transfer of case-holding responsibilities between teams within the ECAF Team. In order to transfer a case all steps must be completed in the correct sequence shown.

ECAF Case Transfer

- ▶ 1. Transfer Details
- 2. Record new coo...
- ⊞ Attachments (0)

Stage: Transfer Details

Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.

Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks.

Select **Transfer Details** from the left menu

Enter the following information:

Key information:

1. Transfer Details

The purpose of this section is to ensure that the new allocated worker and team are aware of all key information about the case.

Details

Electronic Record:

Confirm the following information:

Electronic Record

● **Electronic Record**

Demographic data is complete and up-to-date? Yes No

Record of professional involvements is complete and up-to-date? Yes No

Case Files:

Confirm the following information:

Case Files

● **Case Files**

The paper file contains hard copies of an up-to-date assessment and plan? Yes No

A new case file has been made up if required? Yes No

Point of Transfer:

Point of Transfer

The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.

Proposed Date For Transfer Of Case

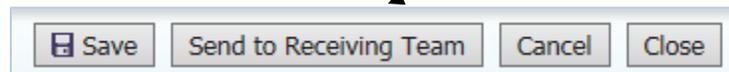
Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.

Receiving Practitioner, Department or Group [Click here to select a user...](#)

Access Check

- Enter the date for the **Proposed Date for Transfer of Case**
- Use the **Click here to select a User** link and select the Group you are transferring to (unless you have agreed the name of the person to transfer to)

Once all this information has been entered click on the **Send to Receiving Team** link at the top right of your screen



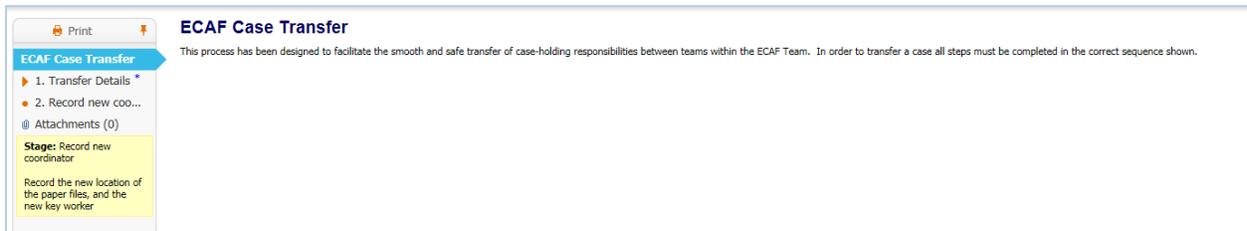
You have transferred the case but will remain the Episode Coordinator until the receiving team completed the second part of the Case Transfer Process!

Receiving a Case Transfer

When a case is transferred to you a task will appear in your Tray:-

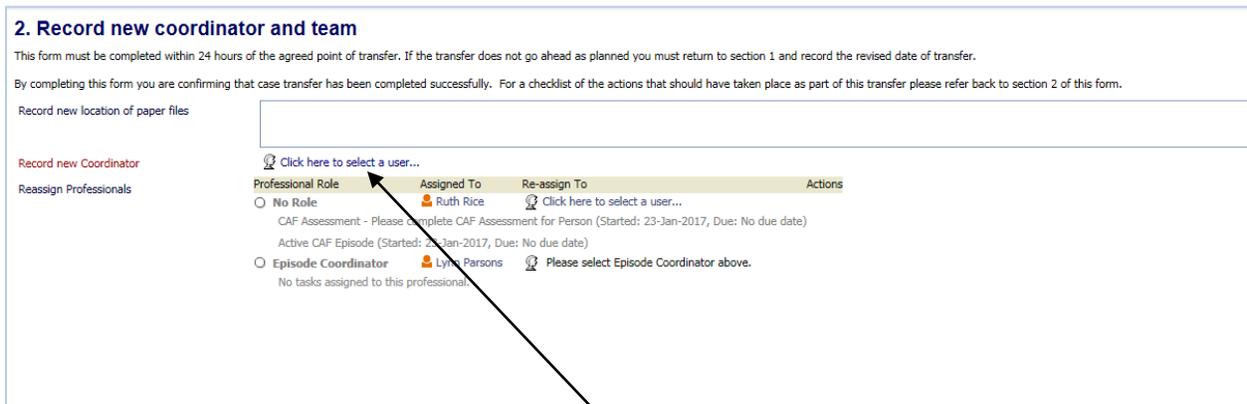


Pick up the task by click on the link and the Transfer Screen will be opened



Select **1.Transfer Details** from the left-hand menu to review the details of the Case being transferred.

Select **2. Record New Coordinator** to begin the process of accepting the Case Transfer



To **Record New Coordinator** click on the link and select the person

Once this information has been entered click on **Complete Case Transfer** link at the top right of your screen



The case has now been transferred and the person chosen is now the **Episode Coordinator!**

The case transfer process is now complete and the **New Episode Coordinator** will be displayed in the involvements section.