EHM

Case Transfer

Document History

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

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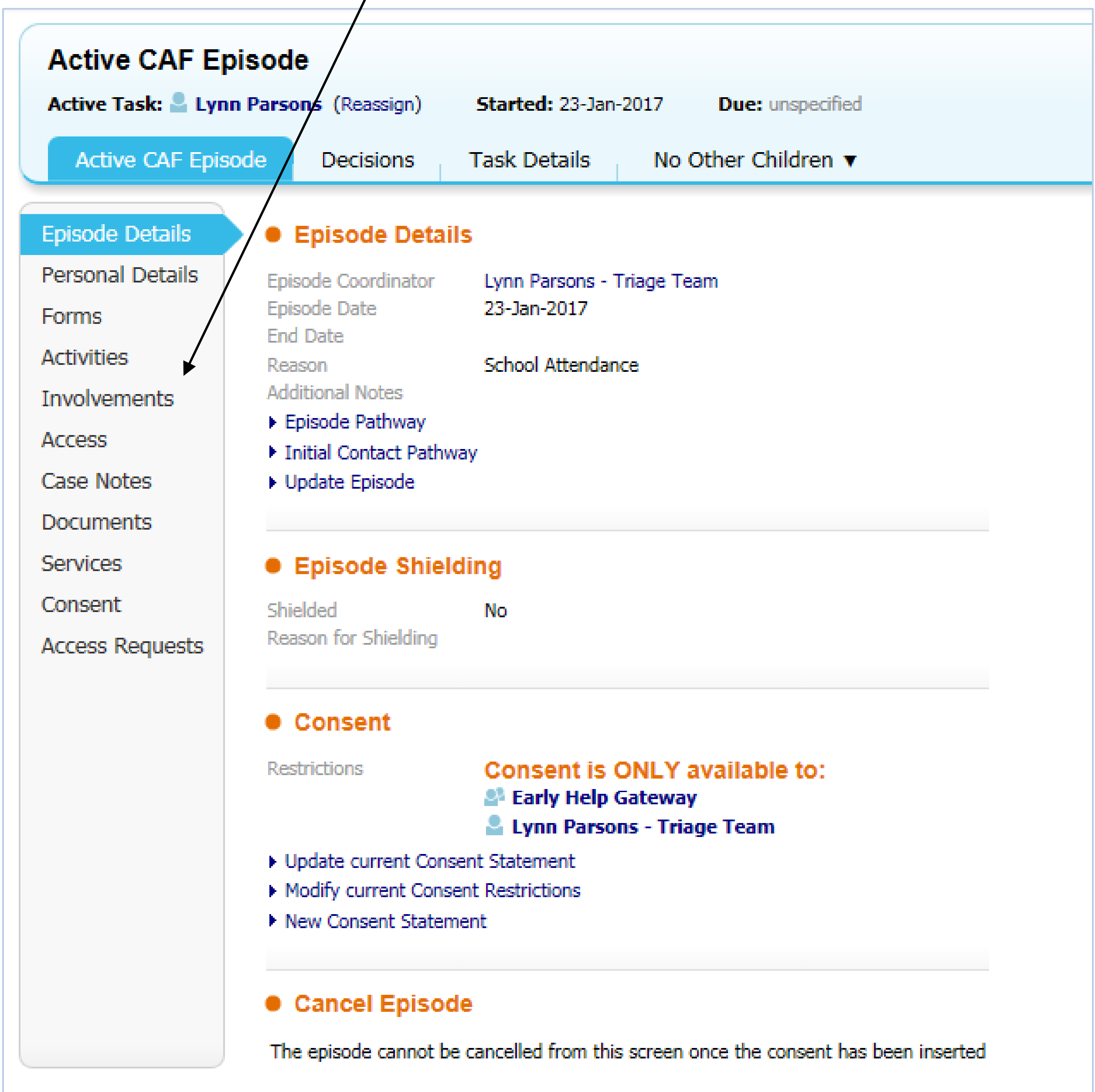
Case Transfer

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

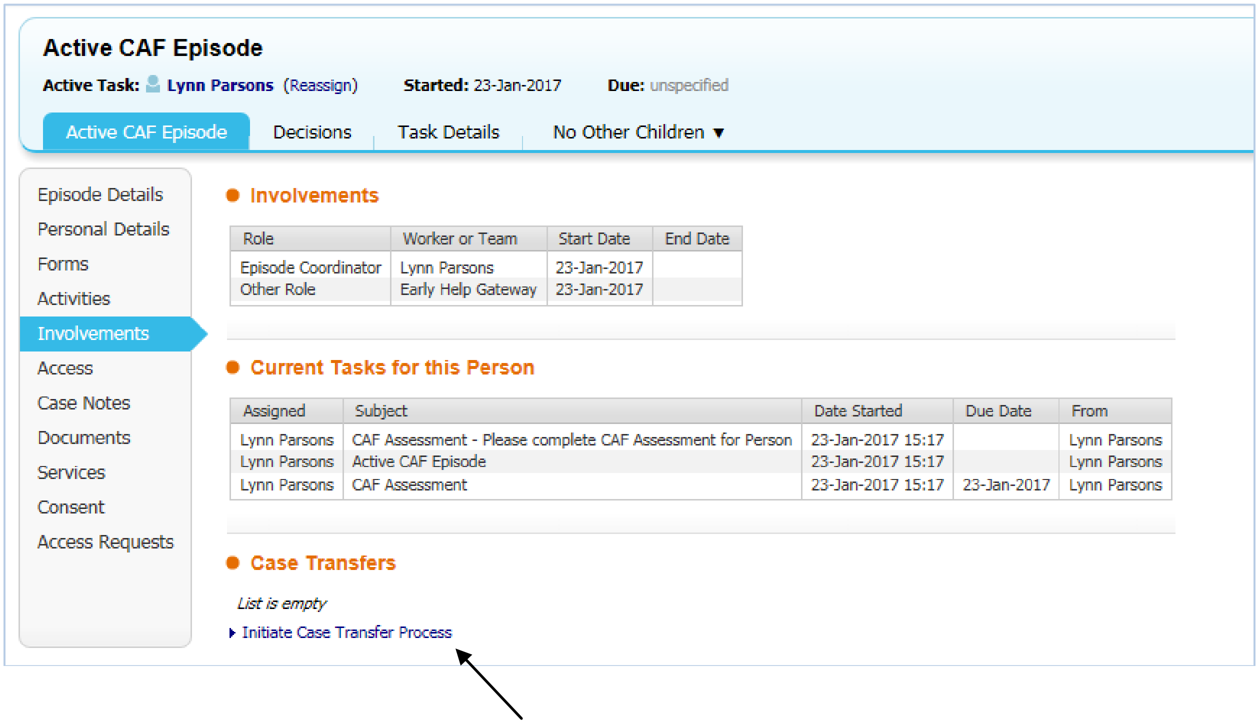
To transfer a Case you must be the Episode Coordinator.

Transferring a Case

From the **Active Episode** select Involvements

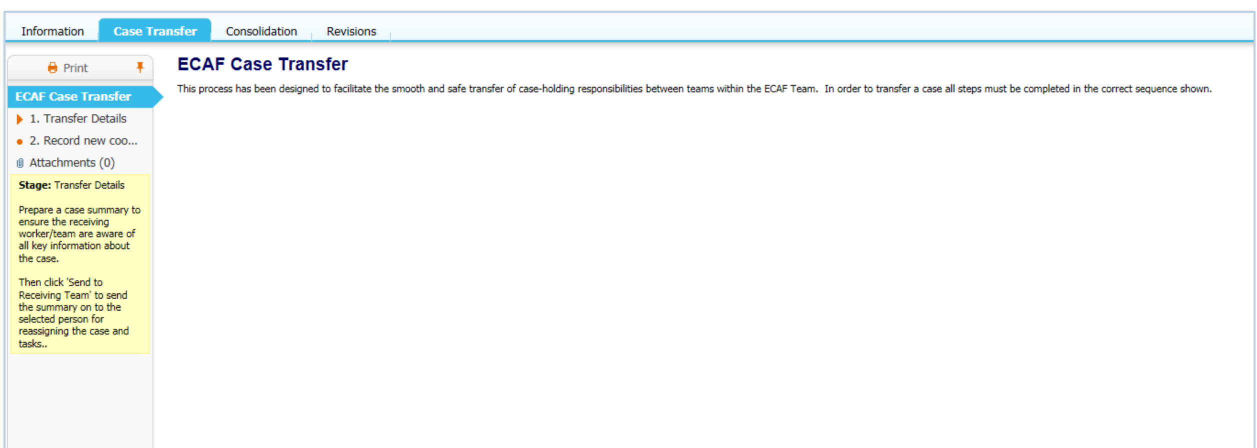


The following screen will be displayed:-



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

The ECAF Transfer Screen will be displayed:



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:

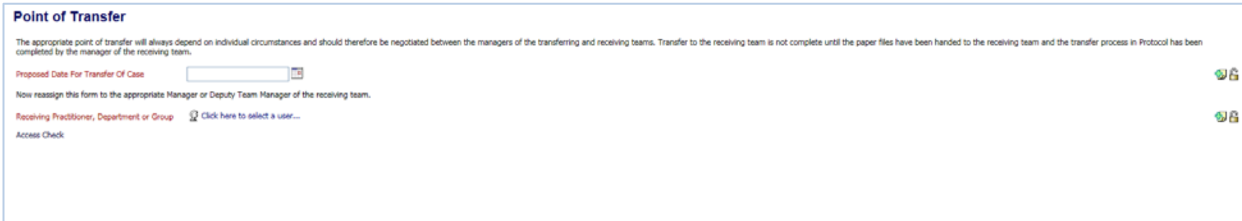
Confirm the following information:

Case Files

Case Files

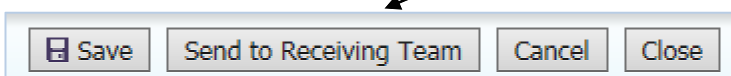
The paper file contains hard copies of an up-to-date assessment and plan?	◯ Yes	◯ No
A new case file has been made up if required?	◯ Yes	◯ No

Point of Transfer:



- 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

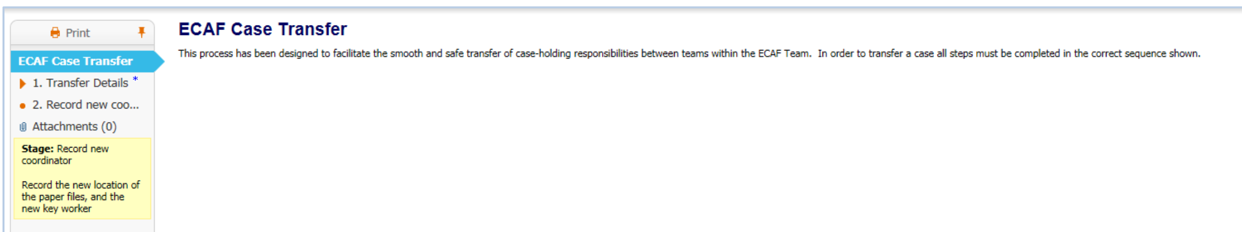


You have transferred the case but will remain the Episode Coordinator until the receiving team completed the second part of the Case Transfer Process!

Receiving a Case Transfer

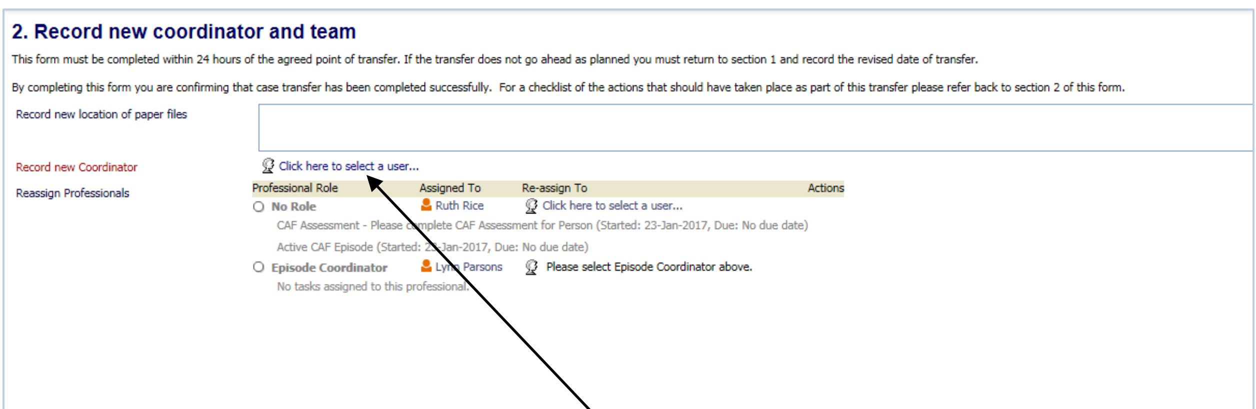
When a case is transferred to you a task will appear in your Tray:-

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



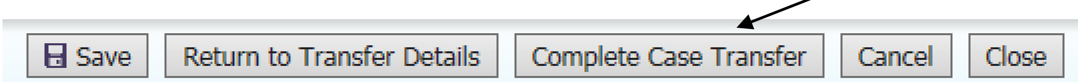
Select **1.Transfer Details** from the left-hand menu to review the details of the Case being transferred.

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.