

Children's Services Quick Guide

Transferring a Case

The process of transferring a case from one team to another is only undertaken when the same workflow is continuing but transferring to a different team. This process would be used when, for example, a child who has an open Child In Need workflow moves from Lincoln to Boston. The CIN workflow remains open, but it would need to be continued by a different area team.

Before you record the following workstep, there are a number of steps you must undertake. These are listed below:

- Assessment(s) Completed
- Plans up to date
- Transfer Visit completed
- Letter sent to family
- Professionals notified
- Family notified
- All visits recorded
- Transfer Audit completed (optional)

Generating a Case Transfer workstep on a Group

The details of why the case is being transferred are recorded in a workstep called **CS Case Transfer** which is available to be started outside the normal workflow of the case at any time.

If the case is open on a group, the workstep needs to be accessed through the **Family details** screen.

- Click on the  Start work button in **Current work**

Group Summary - Family - Family Smith (3492471)
 No group description

Summary Professional relationships Case notes Documents

Family Search: Add History Genogram -

ID	Name	Pronouns	Date of birth	Start date	Actions
3549724	Johnny Smith		3 Sep 2020 (2 years old)	22 Feb 2023	
3549723	Josie Smith		14 Jun 2015 (7 years old)	22 Feb 2023	
3549735	Joy Smith		3 Oct 2022 (5 months old)	23 Feb 2023	

Showing 1 to 3 of 3 entries First Previous 1 Next Last

Address Current work **Start work** Workflow map History

[Josie, Johnny & Joy Smith](#)

105 Witham Wharf

[SC Social Care Case Supervision](#) Assigned to: [Amy Brooke](#)

[SC Child in Need Visit](#) Assigned to: [Amy Brooke](#)

- The **New work** window displays, allowing you to select the group members you wish to include in the case transfer by ticking the relevant boxes.
- Click **Next**
- Select the **CS Case Transfer** hyperlink
- The **CS Case Transfer Record C0915** form will display



Generating a Case Transfer workstep on a single subject

On a single subject record, the Case Transfer workstep can be accessed from the **left-hand side bar menu** on their Person summary screen.

- Click **Start > CS Case Transfer**
- The **CS Case Transfer Record C0915** form will display

Completing the Case Transfer workstep

The same workstep is created whether it is for a single subject or a group. The workstep is split into two sections and has a mandatory clipboard request that must be sent to the Manager of the team receiving the case, and completed before the case can be transferred.

- The Manager for the current team holding the case completes the first part of **Section 1. Transfer Details** completing the Case Summary, Transfer Checklist, CiC Statutory Medical and Educational sections and add the name of the worker or team that the case should be transferred to. The Manager should tick on the Transfer request by tick box.
- The Manager then sends the clipboard request using the request icon  **Required CS Manager: Please review and authorise**, to the Manager of the new team.
- They can **Save** and **Close** out of the workstep.
- The Manager of the new team will review the request and if accepting the case, tick **Completed** on the request. Then complete the remainder of **Section 1. Transfer Details** to authorise the transfer and record the new worker. (The request can be Returned if the case information needs updating before accepting the transfer).
- The Manager then sends the optional notification of **CS Notification of Case Transfer** back to the Manager in the previous team and add the Next action of **CS Transfer Actions completed (NFA)**. The workstep can then be finished using the  finish icon.
- The receiving Team Manager will then end the Worker and Organisation Relationships of the previous worker and team and add the new relationships for the new Worker and Team.
- Previous Manager will receive the Notification and can either access the workstep or view the Person summary screen to check for details of the new Key Worker. Any open worksteps can then be reassigned to the new worker.