# Completing a Young Adult Services Case Transfer from Youth Navigator Network to a PCSA

## Knowledge Base Article

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## Completing a Case Transfer from YNN to a PCSA

# Overview

This article describes steps for Youth Navigator Network users to transfer a Young Adult Services case to a Public Children Services Agency (PCSA).

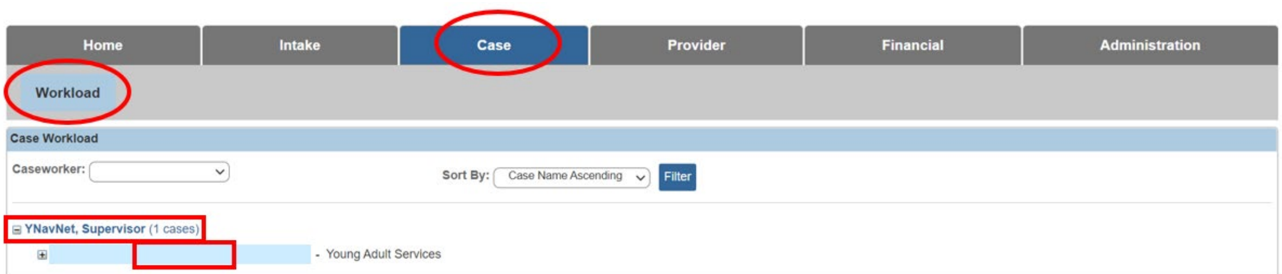
**Important:** Best practice encourages both Youth Navigator Network and the receiving PCSA to communicate throughout the case transfer process.

Youth Navigation Network should contact the PCSA regarding the case and confirm the Case Transfer Administrator the case will be routed to. Once this has been done, the Youth Navigator can begin the transfer process in SACWIS.

# Creating a Case Transfer Activity Log

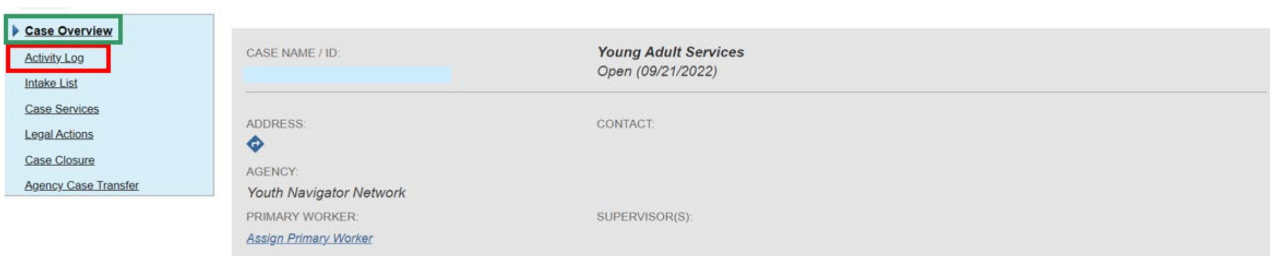
From the SACWIS **Home** page:

1. Click **Case**.
2. Click **Workload**.
3. Click the name of the Youth Navigator assigned to the case.
4. Click the Case Number you wish to transfer.




The **Case Overview** screen appears.

5. Click **Activity Log** in the navigation pane.




The **Activity Log Filter Criteria** screen appears.

6. Click **Add Activity**.

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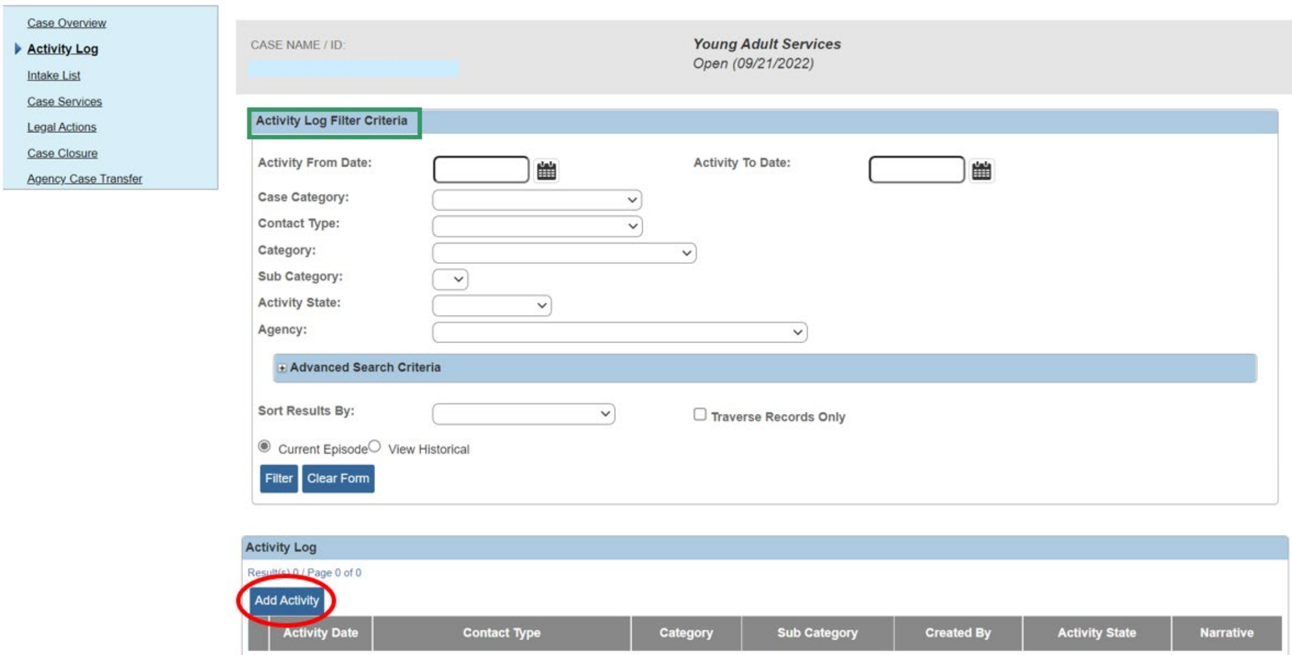
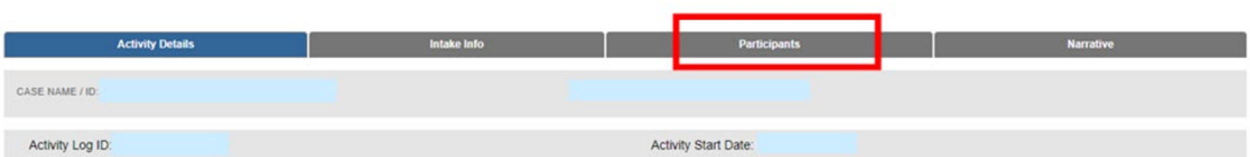



The **Activity Details** screen appears, with the Start Activity Date and Responsible Worker fields pre-populated.

7. Enter the **Start Activity Date**, if needed.
8. Select **Responsible Worker**, if needed.
9. Select an option from the list of **Available Contact Types** in the **Contact Types** grid (this will activate the **Add** option).
10. Click **Add** to place the Contact Type you selected in the **Select Contact Types** box.
11. Select **Case Transfer** from the **Category** drop-down menu.
12. Select **Case Transfer Summary** from the list of **Available Sub Categories**.
13. Click **Add**.
14. Click the **Participants** tab near the top of the page.



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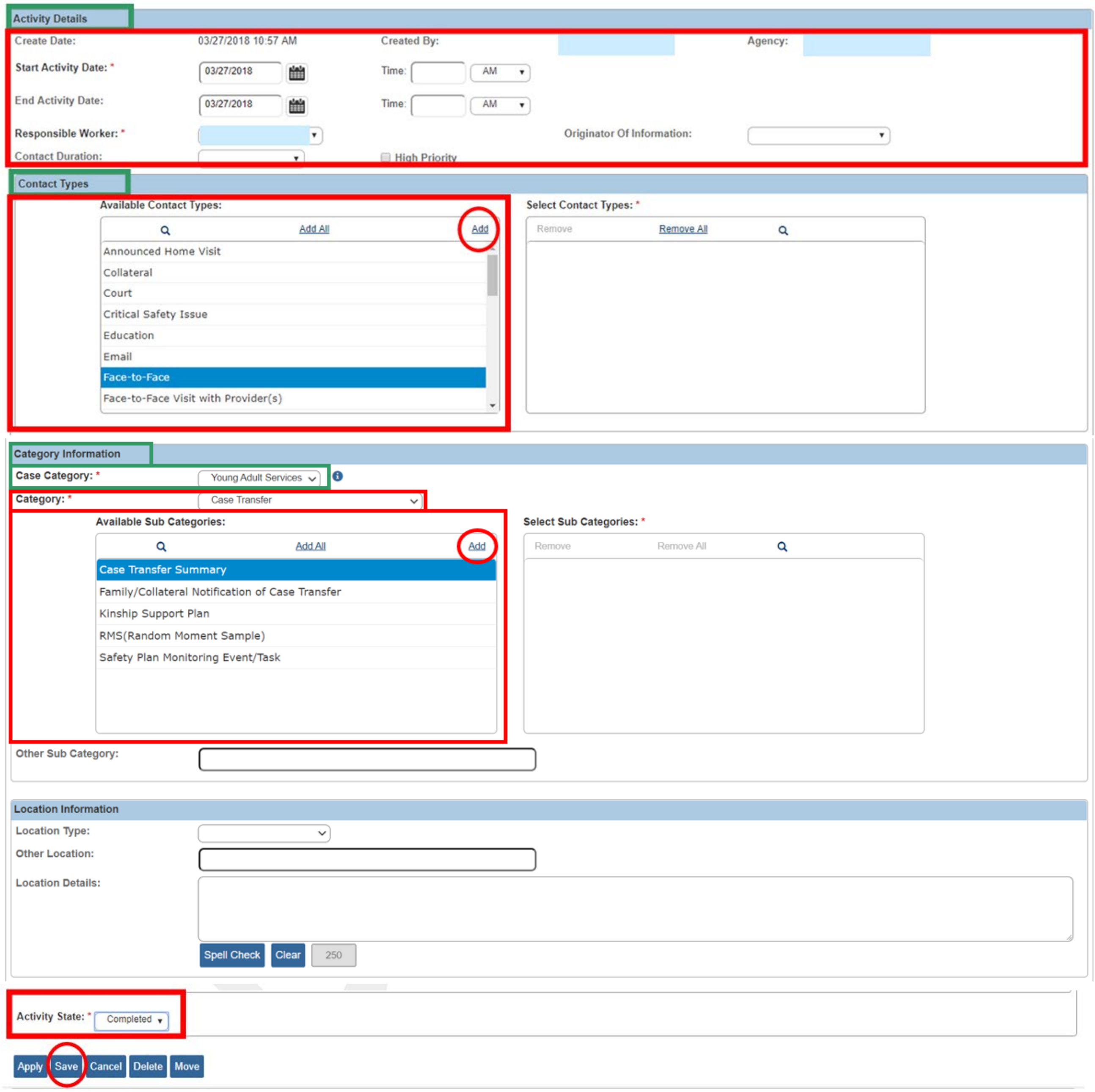
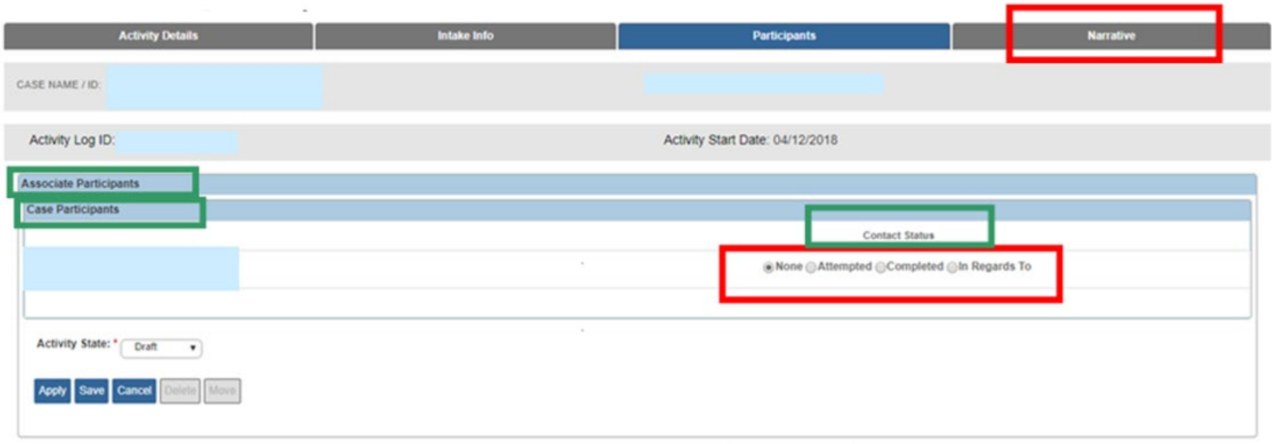



The **Associate Participants** screen appears.

1. Select a **Contact Status** in the **Case Participants** grid.
2. Click the **Narrative** tab near the top of the page.

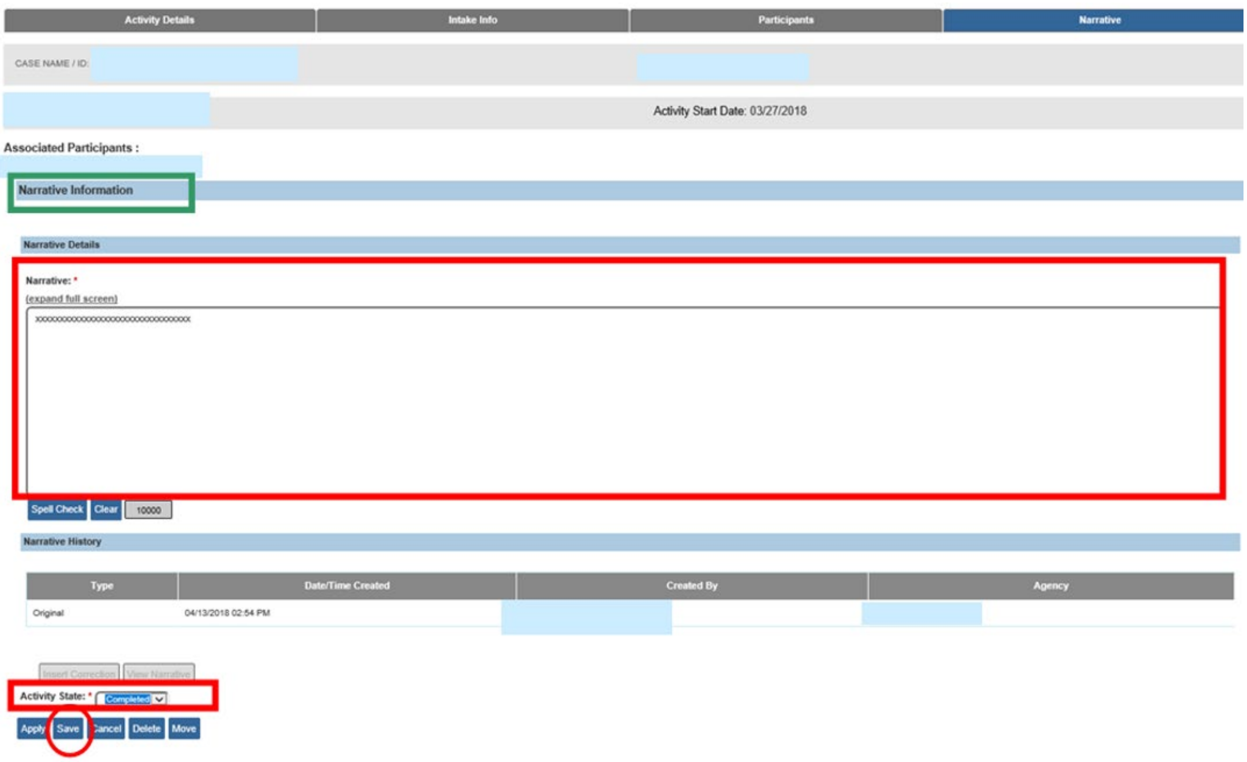



The **Narrative Information** screen appears.

1. Enter text in the **Narrative** field.

**Note:** This narrative will later display in the **Case Transfer** record.

2. Select **Completed** from the **Activity State** dropdown.
3. Click **Save**.

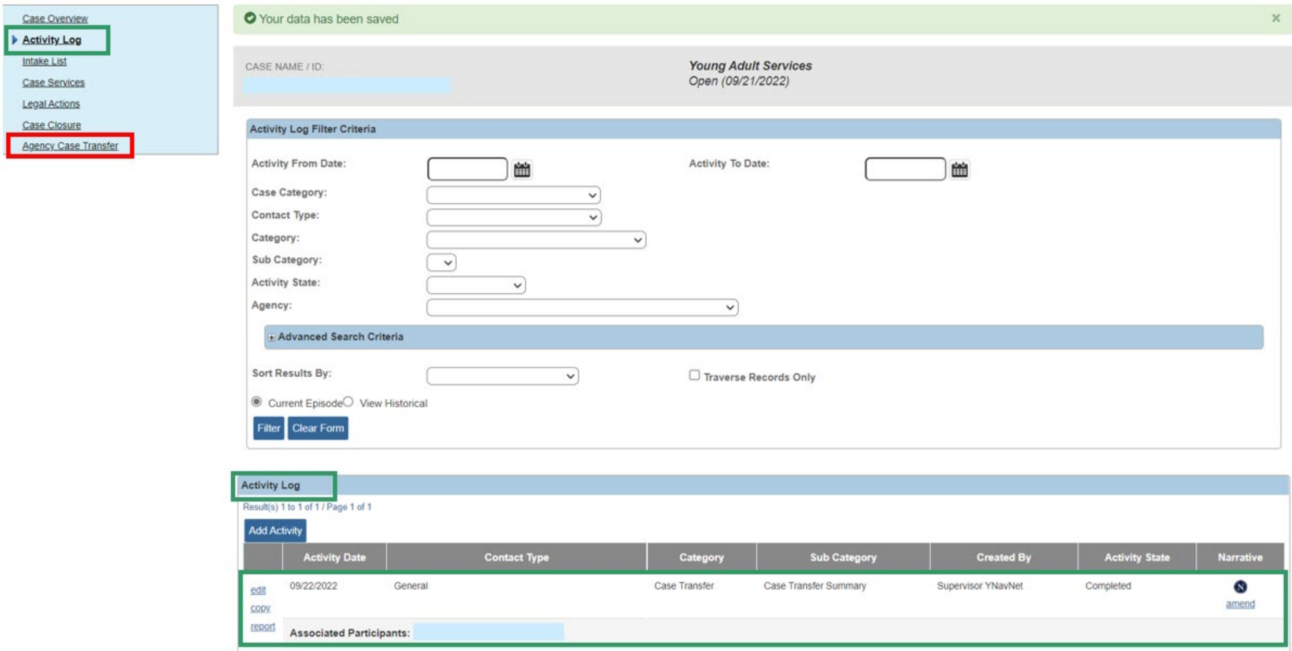



The **Activity Log** page appears, displaying the added record in the **Activity Log** grid.

## Completing the Case Transfer

# Completing a Case Transfer from YNN to a PCSA

1. Click **Agency Case Transfer** in the navigation pane.



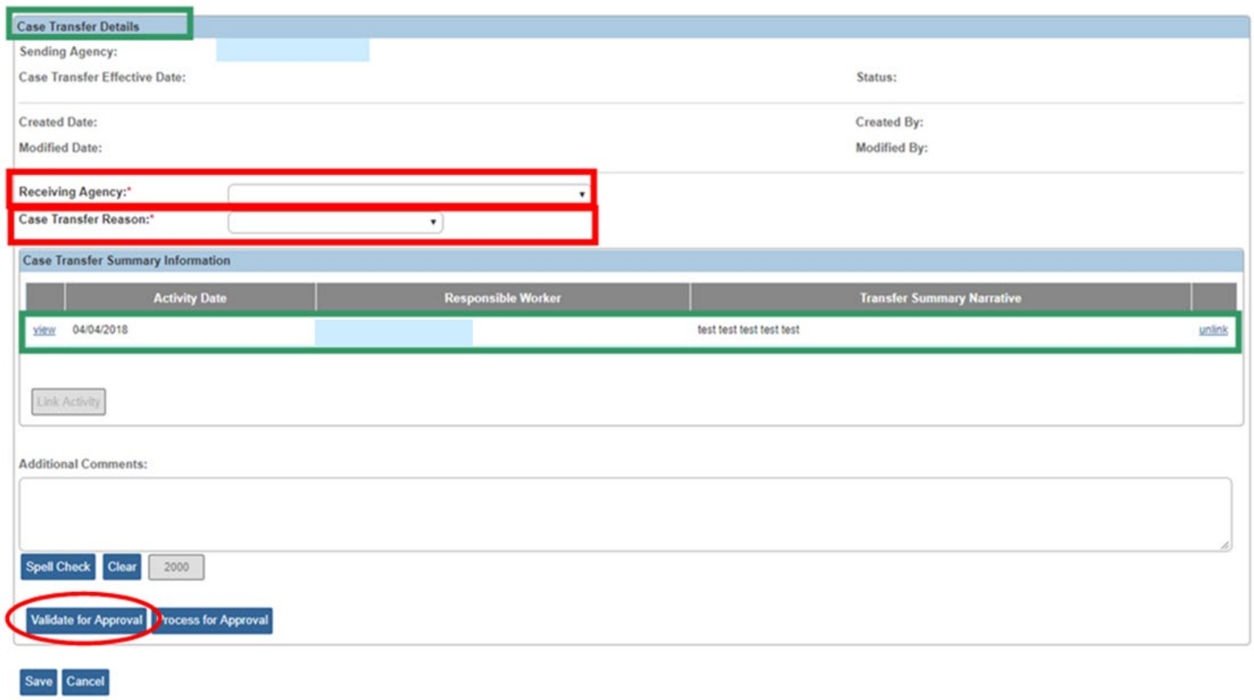

The **Case Transfer(s)** screen appears.

2. Click **Add Case Transfer**.


The **Case Transfer Details** screen appears.

**Note:** The **Case Transfer Activity Log** is automatically linked to the record.

1. Select the **Receiving Agency** from the dropdown menu.
2. Select the **Case Transfer Reason** from the dropdown menu.
3. Click **Validate for Approval**

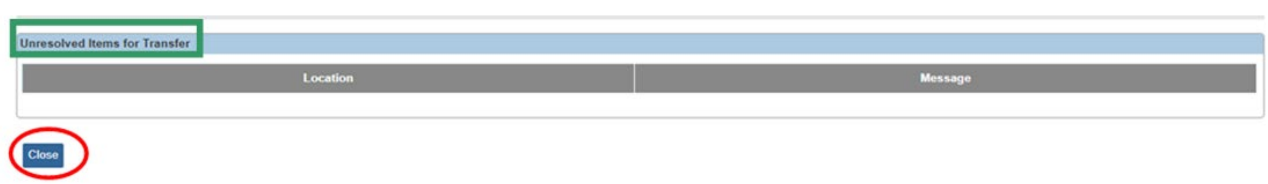



If there is an unresolved item(s), the Unresolved Items for Transfer grid appears.

4. Click the link(s) in the Location column to correct the item(s).


If no unresolved items exist, the Unresolved Items for Transfer grid appears with nothing listed.

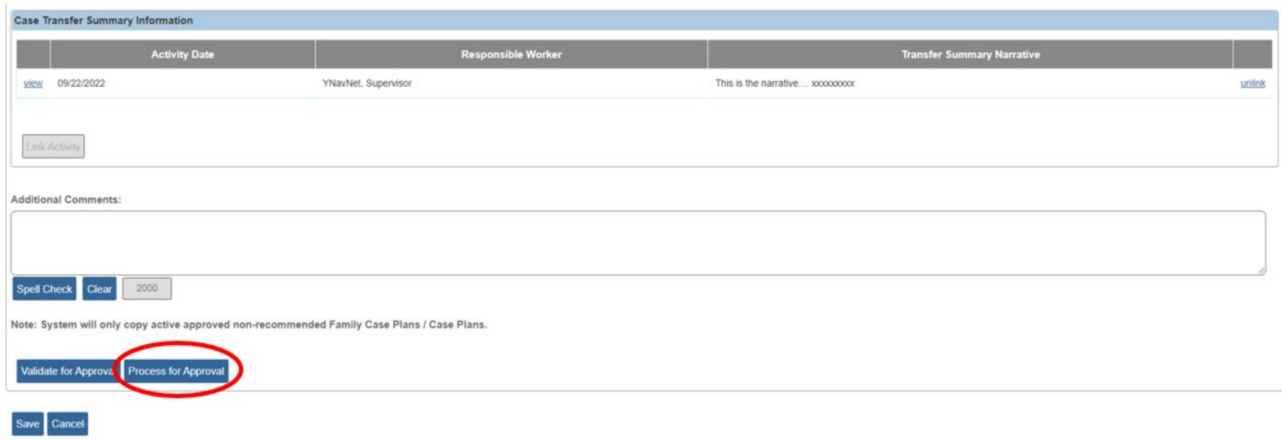
5. Click **Close**.




The **Case Transfer Details** grid appears.

## Processing for Approval

1. Click **Process for Approval**.




The **Process Approval** screen appears.

**Important:** The SACWIS case transfer functionality allows the transferring agency user to:

- Route the case transfer record internally to a supervisor for review and processing, or
- Route the case transfer record directly to the receiving agency.

2. Select **Route** from the **Action** dropdown menu.
3. From the **Agency** dropdown menu, select the agency the case transfer will be routed to.

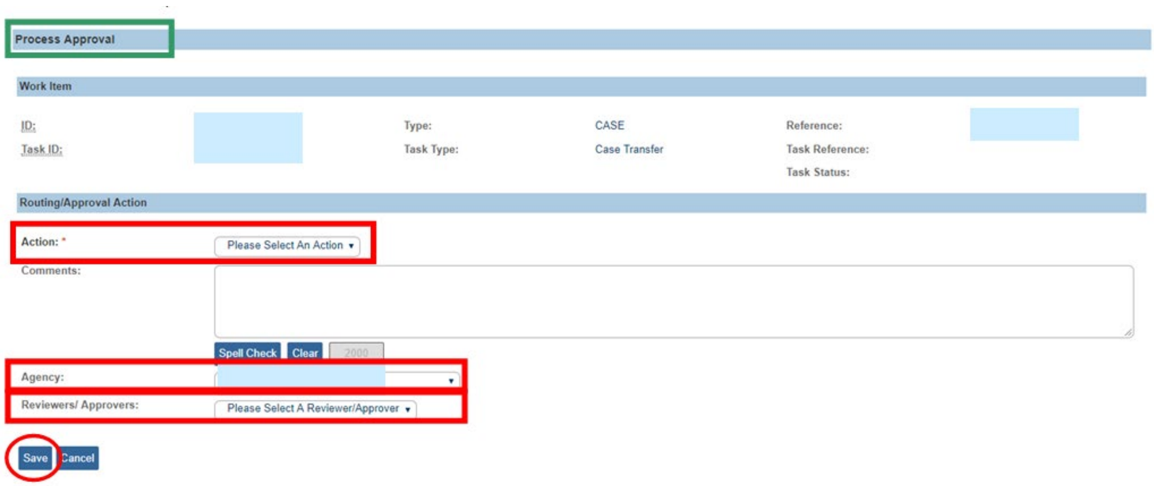
**Note:** To route internally for review, this will be the Youth Navigator Network agency. Otherwise, select the receiving agency.

4. From the **Reviewers/Approvers** dropdown menu, select the name of the person you wish to route the transfer to.

**Note:** Only receiving agency employees who have **Case Transfer Administrator** security will be available to select in the **Reviewer/Approver** field.

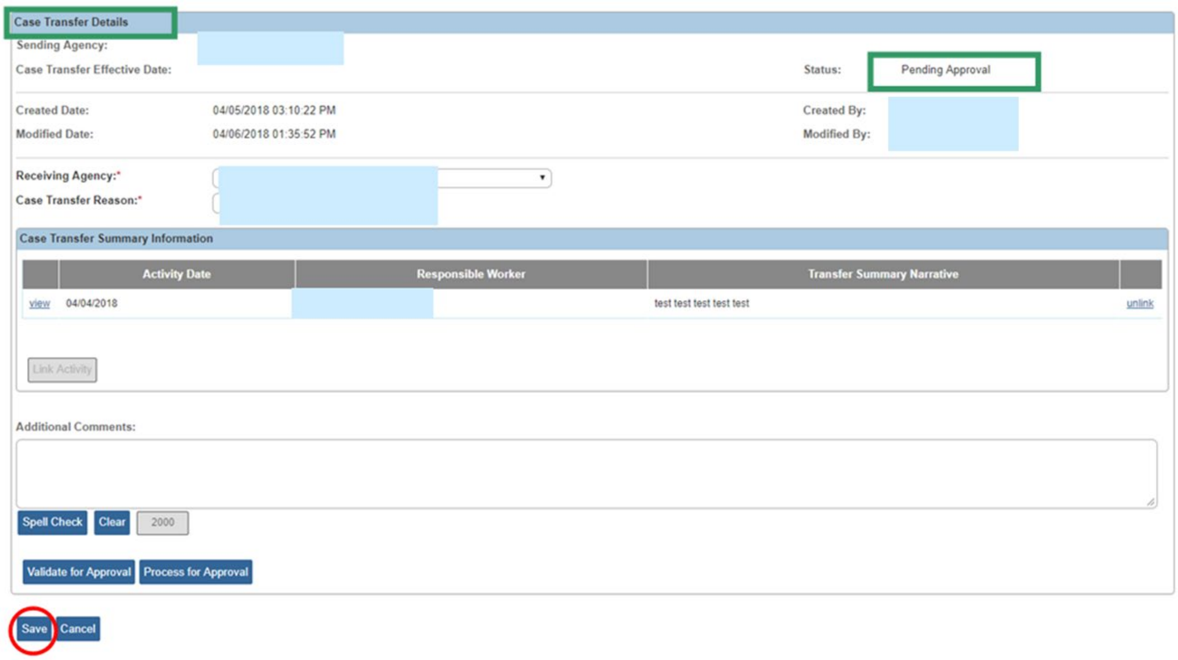
5. Click **Save**.

# Completing a Case Transfer from YNN to a PCSA




The **Case Transfer Details** screen appears, displaying a **Pending Approval** status.

6. Click **Save**.




The **Case Transfer(s)** screen appears.

## Reviewing and Final Routing for Approval

**Important:** If the Case Transfer was routed to an internal Case Transfer Administrator, that person will follow the steps below to access the Case Transfer record and complete the process.

From the SACWIS **Home** page:

1. Click **Approvals**.

2. Click the **Case Transfer** link.


The **Case Transfer Details** screen appears.

3. Click **Process for Approval**.
4. Follow steps 2-5 in the previous Processing for Approval section to route to the Receiving Agency.

## The Receiving Agency Process

The Receiving Agency Case Transfer Administrator will access the record from their Approvals screen. Once they have reviewed the Case Transfer record, the transfer administrator will do one or more of the following:

- Decline for re-work, record comments, and then route the case transfer work item(s) back to the Youth Navigator Network Agency. The process can be repeated as needed.
- Accept the Case Transfer record by final approving it.

Once the status of the Case Transfer is Approved:

- Youth Navigator Network agency's assignments are end dated.
- The Receiving PCSA Transfer Administrator will be assigned to the case effective on the case transfer approval date.
- The Case Status History screen will show when ownership of the case changed from Youth Navigator Network to the Receiving PCSA.

If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .