Completing a Bridges to PCSA Case Transfer

Knowledge Base Article

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Overview

This Knowledge Base Article discusses steps for transferring a Bridges case back to the PCSA, including procedures for both the *Transferring Agency* and the *Receiving Agency*.

Important: Although the case transfer process in SACWIS has improved system usability and streamlined business procedures, best practice encourages both the transferring agency and the receiving agency to maintain a high-level of communication throughout the entire case transfer process.

When it is necessary to transfer a Bridges case back to the PCSA, the Bridges worker will contact the PCSA worker and inform him or her of the transfer.

The PCSA worker must then create a Young Adult Services (YAS) Intake and link it to the Bridges case that will be transferred. For Information about creating and linking a YAS Intake, please refer to the following article: Creating and Linking a Young Adult Services Intake.

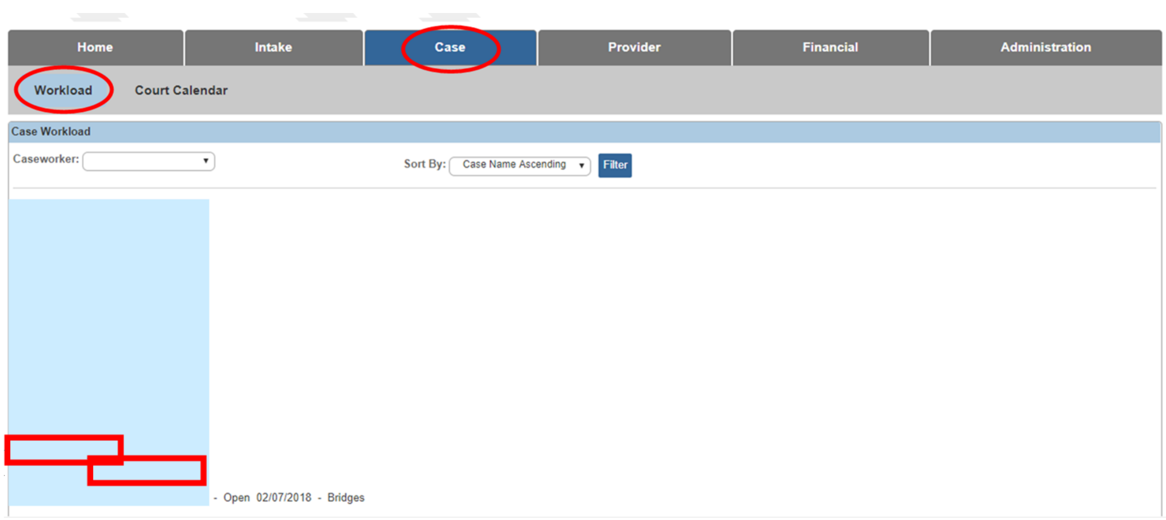
Once the Intake has been created and linked to the Bridges case, the Bridges worker at the sending agency can begin the transfer.

The Transferring Agency

Creating a Case Transfer Activity Log

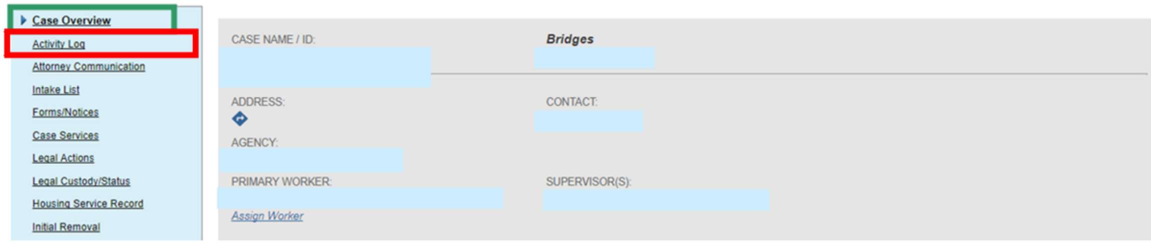
From the SACWIS home page:

1. Click, **Case**.
2. Click, **Workload**.
3. Click the name of the appropriate worker.
4. Click the appropriate case number.



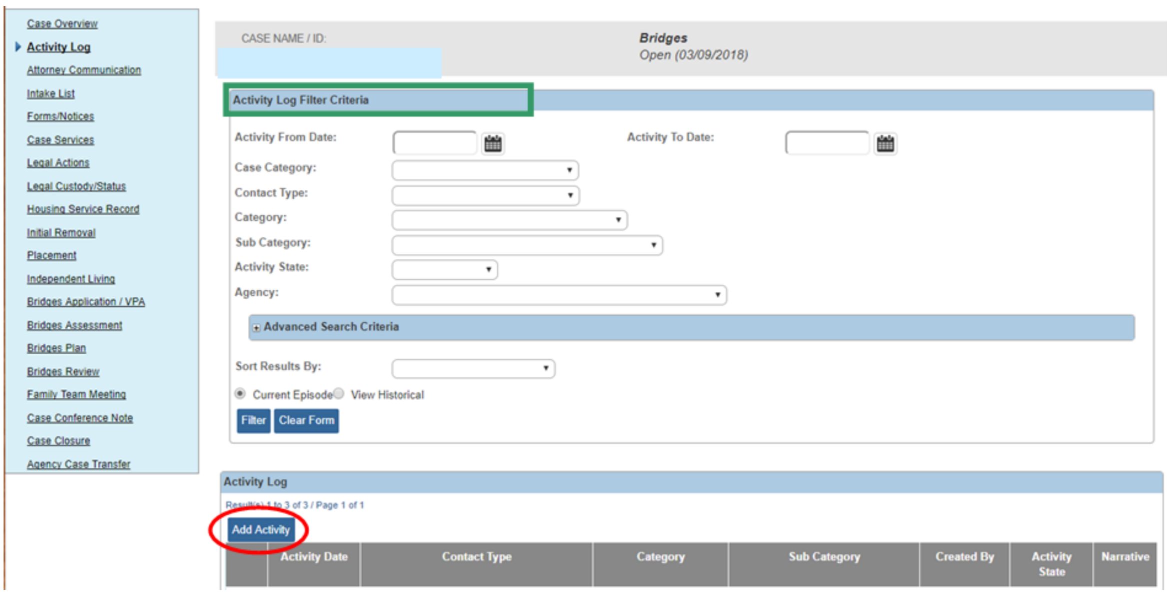
The **Case Overview** screen appears.

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



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

1. Click, **Add Activity**.

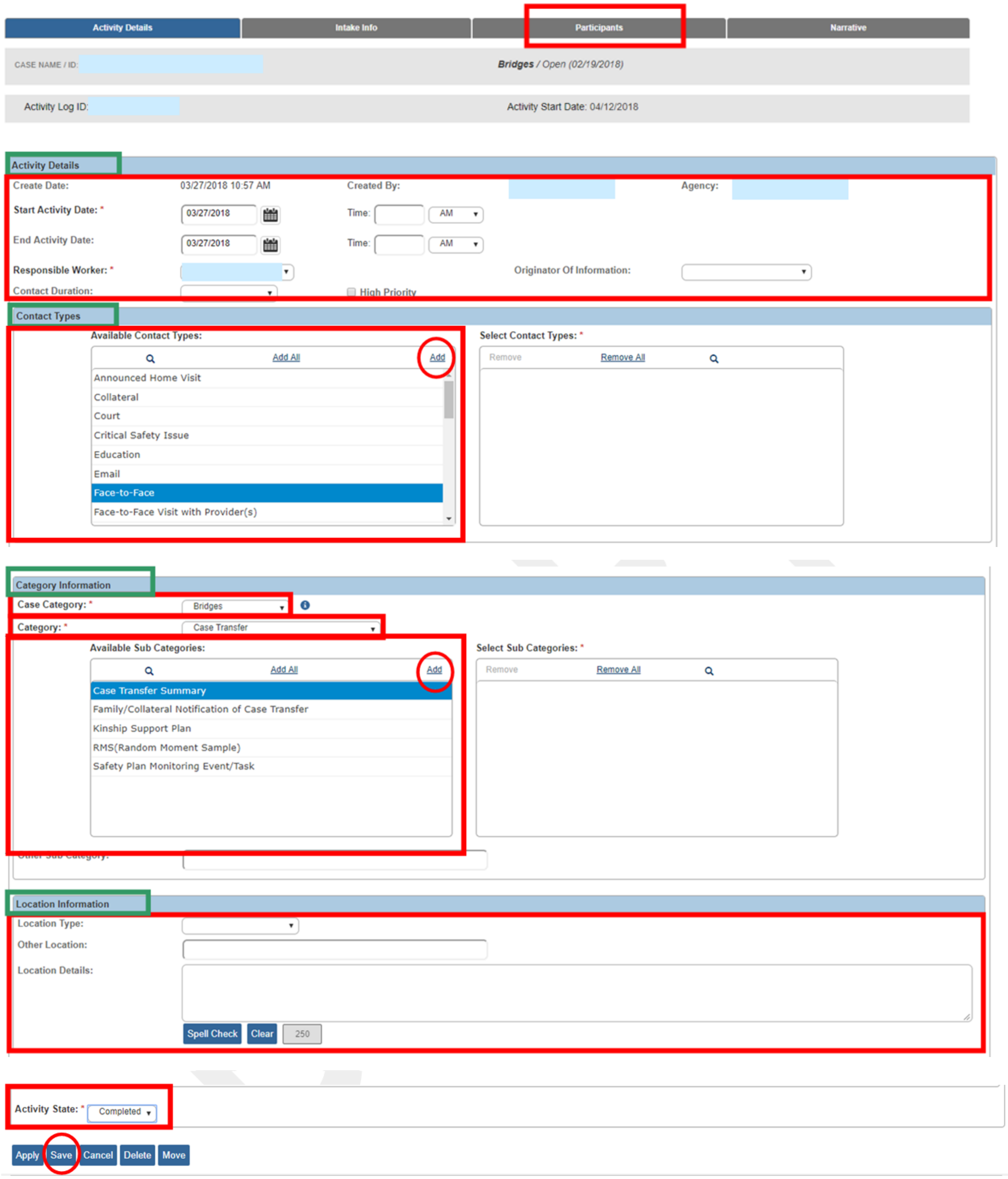


The **Activity Details** grid appears.

2. The **Start Activity Date** and **Responsible Worker** fields will be pre-populated.
3. Make a selection from the list of **Available Contact Types** in the **Contact Types** grid (this will activate the **Add** option).
4. Click, **Add** (this will place the Contact Type you selected in the **Select Contact Types** box).
5. **Bridges** will auto-populate the **Case Category** drop-down menu in the **Category Information** grid.
6. Select, **Case Transfer** from the **Category** drop-down menu.
7. Select, **Case Transfer Summary** from the list of **Available Sub Categories**.
8. Click, **Add**.

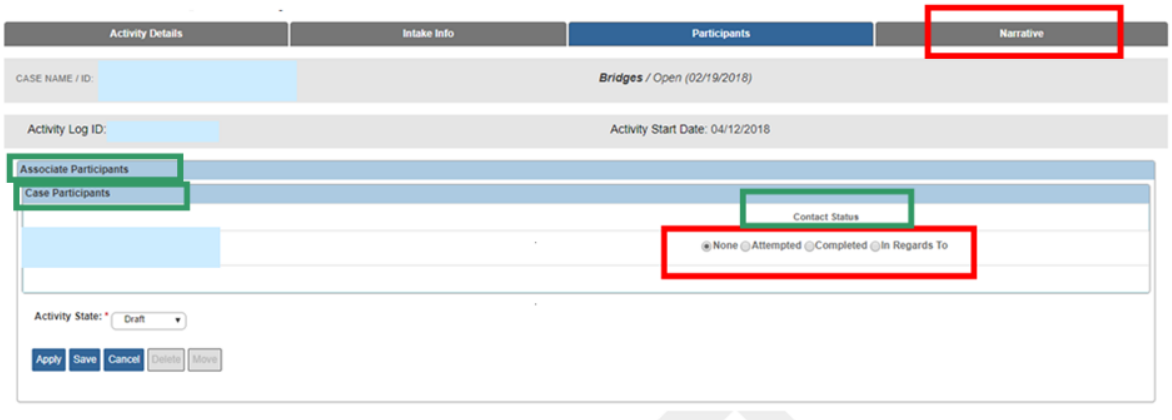
Note: You have the option to complete the information in the **Location Information** grid; it is not required.

9. Click the **Participants** tab near the top of the page.



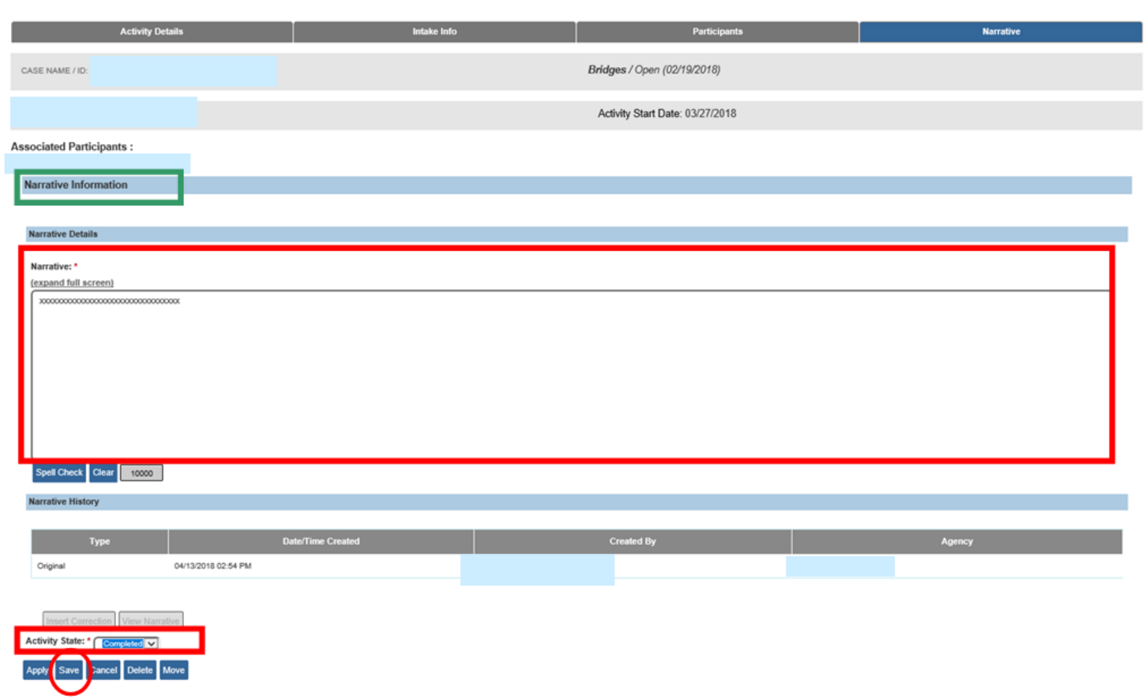
The **Associate Participants** screen appears.

1. Make a selection from the options under **Contact Status** in the **Case Participants** grid.
2. Click the **Narrative** tab near the top of the screen.



The **Narrative Information** screen appears.

1. Enter narrative text in the **Narrative** text box.
2. Select, **Completed**, from the **Activity State** drop-down menu.
3. Click, **Save**.



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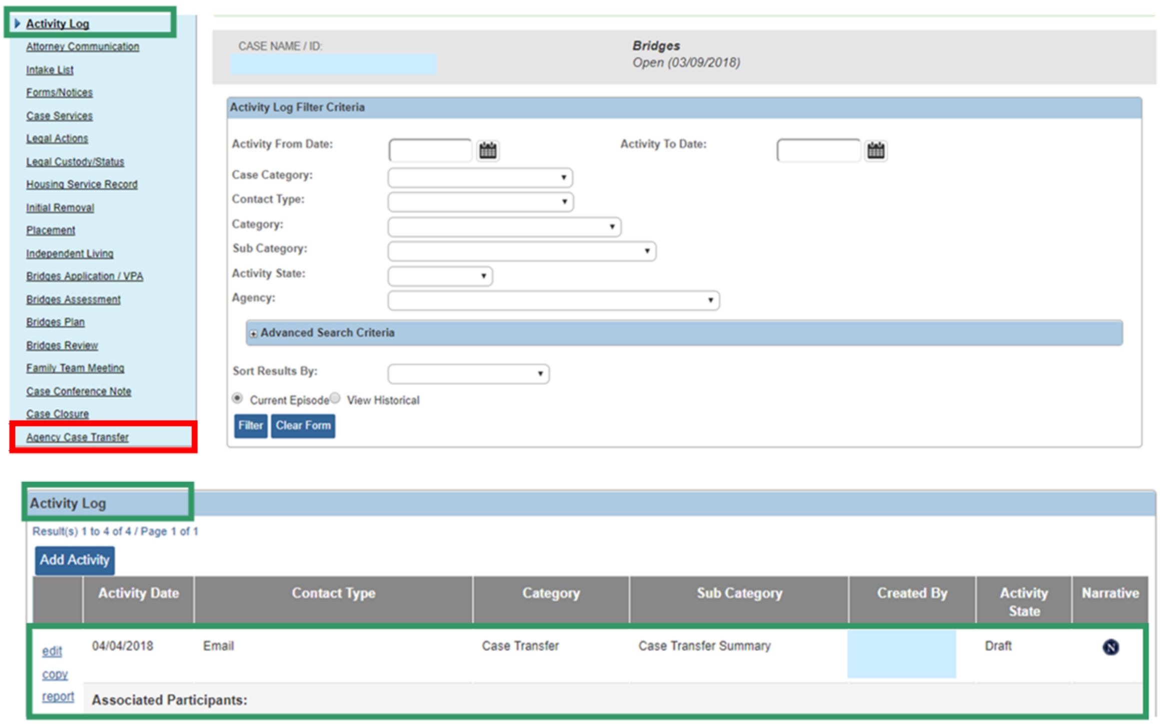
The **Activity Log** page appears, displaying the added activity in the **Activity Log** grid.

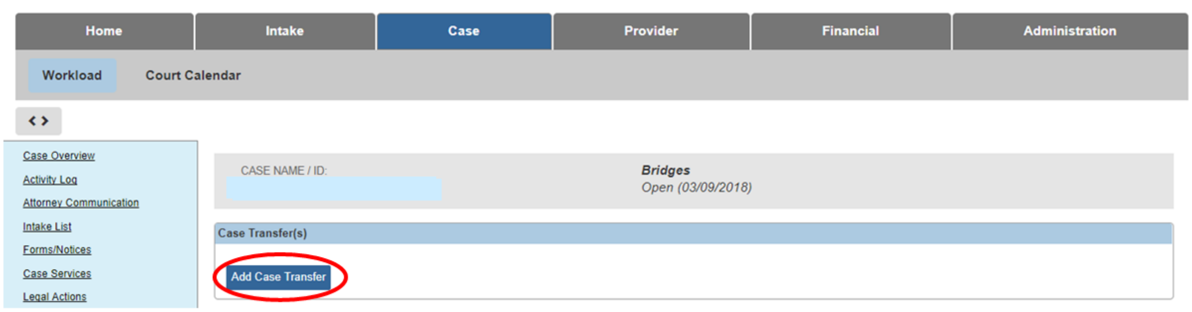
Completing the Case Transfer

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



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

2. Click, **Add Case Transfer**.



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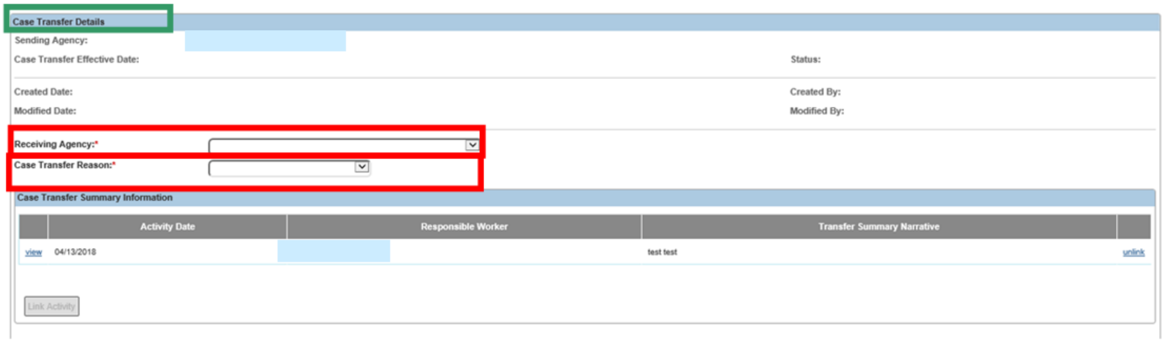
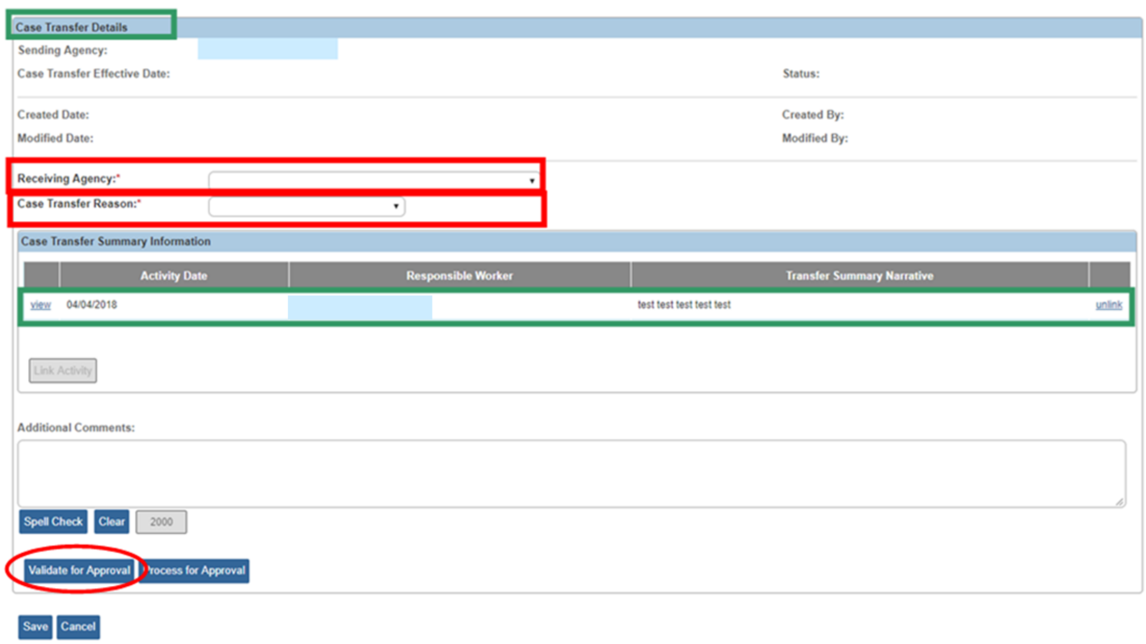
The **Case Transfer Details** grid appears.

3. Make a selection from the **Receiving Agency** drop-down menu.
4. Make a selection from the **Case Transfer Reason** drop-down menu.



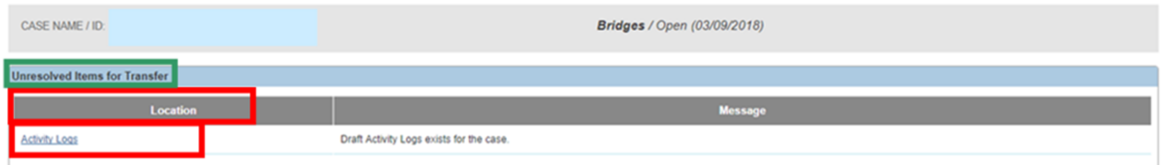
The **Case Transfer** screen appears, displaying the selected case in the **Case Transfer Summary Information** grid.

5. Make a selection from the **Receiving Agency** drop-down menu.
6. Make a selection from the **Case Transfer Reason** drop-down menu.
7. Click, **Validate for Approval**.



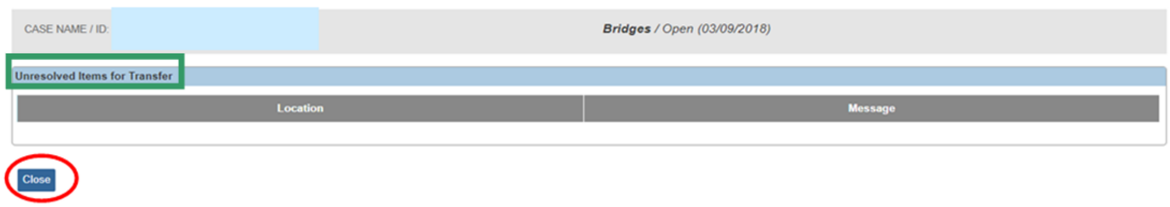
If there is an unresolved item(s), the **Unresolved Items for Transfer** grid appears:

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



If no unresolved item(s) exist, the **Unresolved Items for Transfer** grid appears with nothing listed.

9. Click, **Close**.



The **Case Transfer Details** grid appears.

Processing for Approval

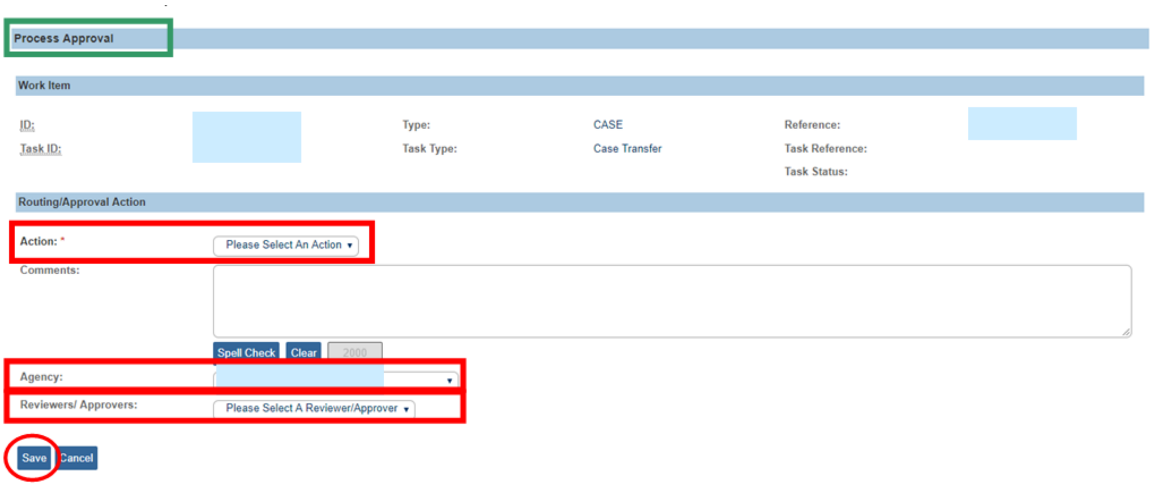
1. Click, **Process for Approval**.

The **Process Approval** screen appears.

Important: The SACWIS case transfer functionality allows the **Transferring Agency** to:

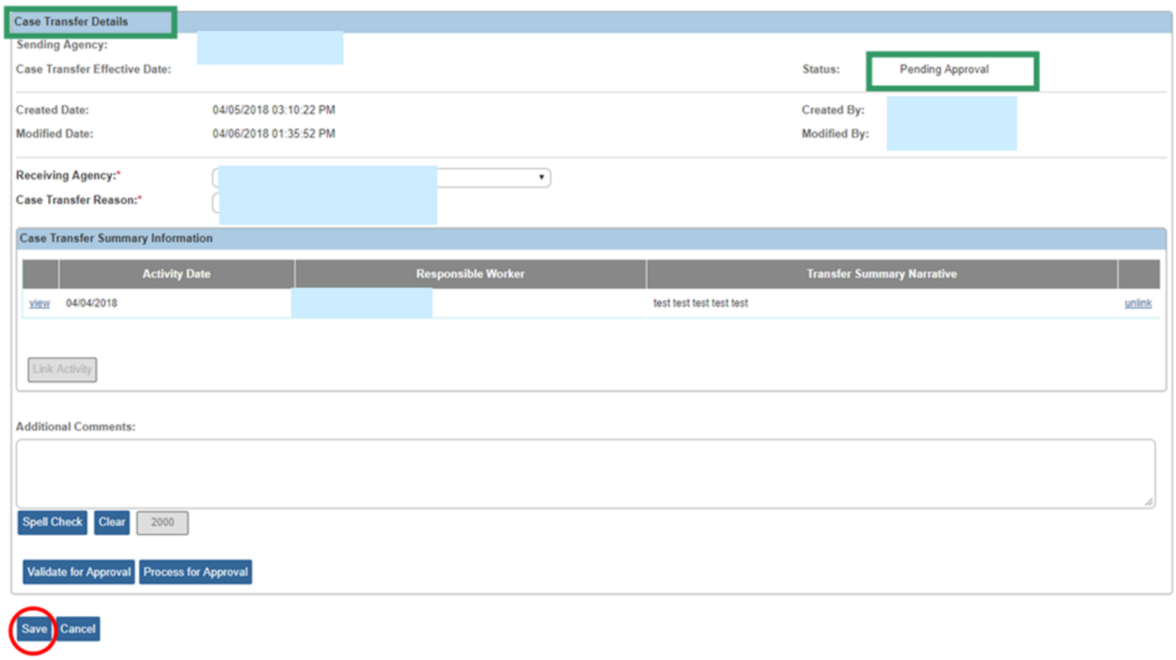
- Route the case transfer record internally to the appropriate supervisor.
- If the process within your agency requires a manager to review the case transfer record prior to sending it to your agency's transfer administrator, select your agency from the **Agency** field drop-down list. Then, choose the appropriate name in the **Reviewer / Approver** field.
- Only agency employees who have the security of **Case Transfer Administrator** have the ability to route the case transfer to the Receiving Agency.
- Route the case transfer record directly to the Receiving Agency.
- Only Receiving Agency employees who have the security of **Case Transfer Administrator** will populate the **Reviewer / Approver** field.

2. Make a selection from the **Action** drop-down menu.
3. Make a selection from the **Agency** drop-down menu.
4. Make a selection from the **Reviewers/Approvers** drop-down menu.
5. Click, **Save**.



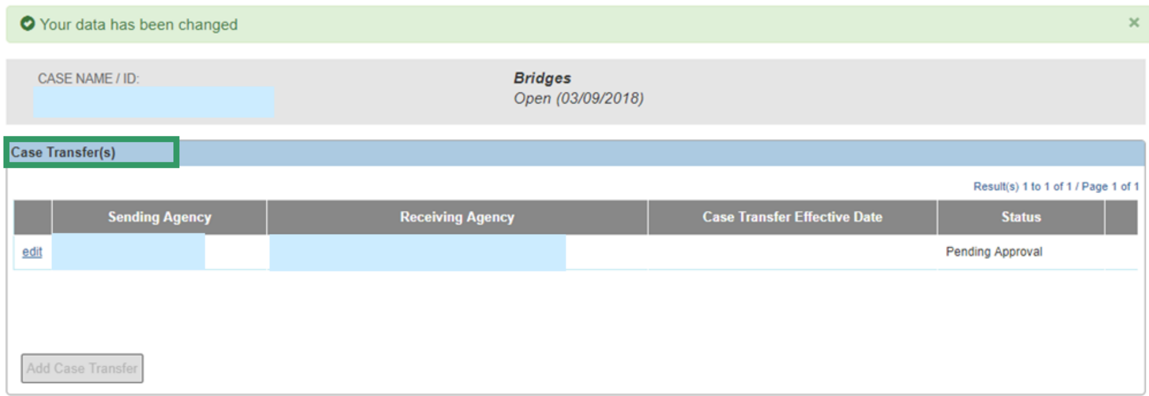
The **Case Transfer Details** grid appears, displaying a **Pending Approval** status.

6. Click, **Save**.



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

> **Important**: At this point, the Case Transfer Administrator for the transferring agency will go into the transfer request and route it to the Receiving Agency (PCSA) for approval.



Finalizing the Case Transfer

The Receiving Agency

The Receiving Agency Transfer Administrator will go to the SACWIS home page and click, **Approvals**; the **Pending Approval** record will be there for the administrator's review. Once the case transfer record has been reviewed, 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 Transferring Agency. This process can continue for as long as needed.
- Accept the case transfer record by final approving the work item(s).
- Once accepted and approved, the Transferring Agency's assignments are end dated.
- The Receiving Agency Transfer Administrator will be assigned to the case effective on the case transfer approval date (unless previously assigned during the court acceptance date process)
- The Case Status History screen will create a new record to show when ownership of the case changed from the Transferring Agency to the Receiving Agency.
- At the discretion of the Receiving Agency Transfer Administrator, the case can then be either reassigned or assigned as needed.

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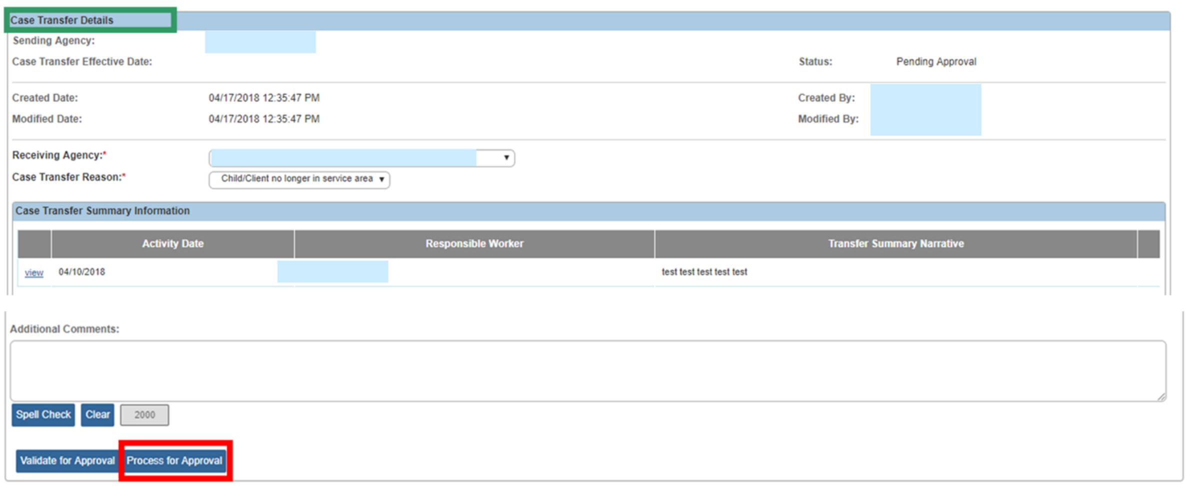
Final Approval

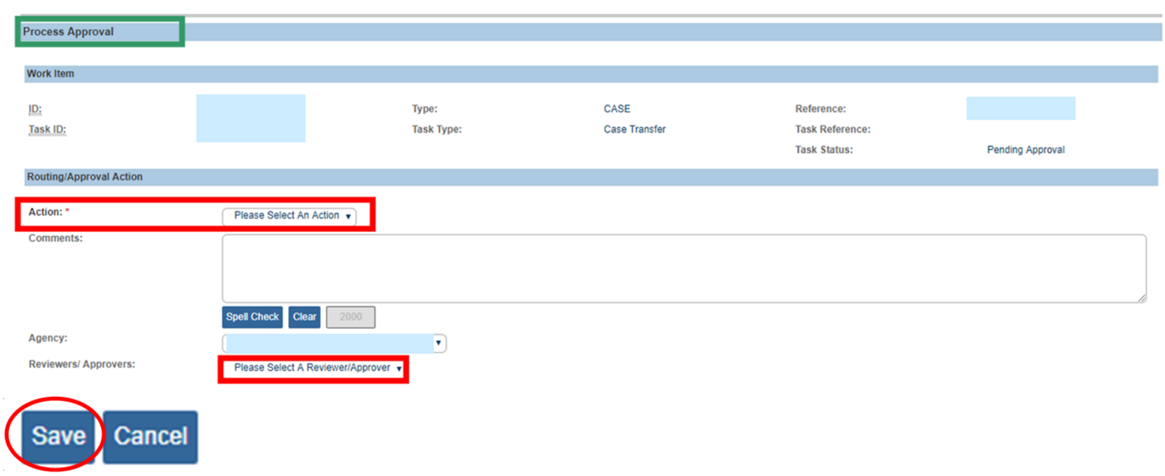
1. Click the **Case Transfer** link.

The **Case Transfer Details** screen appears.

2. Click, **Process for Approval**.



3. The **Process Approval** screen appears.
4. Select, **Approved-Final**, from the **Action** drop-down menu.
5. Make a selection from the **Reviewers/Approvers** drop-down menu in the Routing/Approval Action grid.
6. Click, **Save**.



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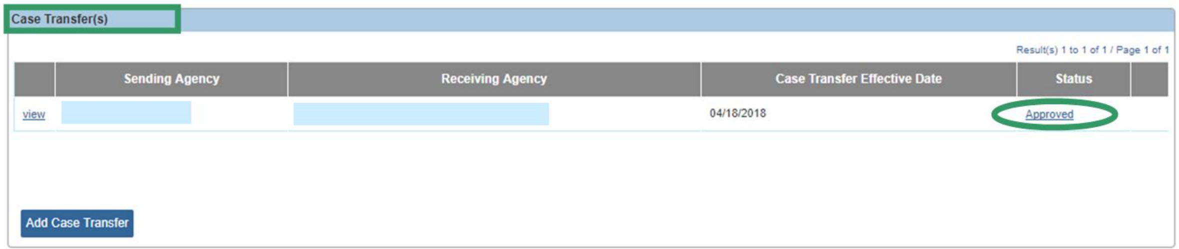
The **Case Transfer(s)** grid appears, displaying the **Sending Agency**, the **Receiving Agency**, and the **Case Transfer Effective Date**. The **Status** is **Approved**.



Important: Transferring a case from one Bridges agency to another Bridges agency follows the same instructions provided in this article. However, while the case category changes in a Bridges to PCSA transfer (from Bridges to YAS), the case category will remain the same (Bridges) when transferring from one Bridges agency to another.

If you need additional information, please contact the SACWIS Help Desk.