

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



**Knowledge Base Article**

# Completing a Case Transfer from YNN to a PCSA

## Table of Contents

Overview .....	3
Creating a Case Transfer Activity Log .....	3
Completing the Case Transfer .....	6
Processing for Approval.....	8
Reviewing and Final Routing for Approval .....	10
The Receiving Agency Process .....	11

# 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).

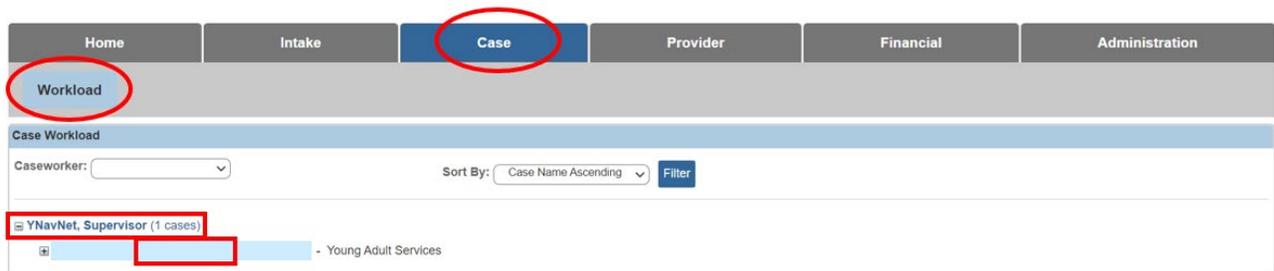
**Important:** Best practice encourages both Youth Navigator Network and the receiving PCSA to communicate throughout the case transfer process.

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**.

# Completing a Case Transfer from YNN to a PCSA

The screenshot shows a software interface for managing case activities. On the left is a navigation menu with options: Case Overview, Activity Log (selected), Intake List, Case Services, Legal Actions, Case Closure, and Agency Case Transfer. The main area is titled 'CASE NAME / ID: Young Adult Services' and 'Open (09/21/2022)'. Below this is the 'Activity Log Filter Criteria' section, which includes fields for 'Activity From Date' and 'Activity To Date' (both with calendar icons), and dropdown menus for 'Case Category', 'Contact Type', 'Category', 'Sub Category', 'Activity State', and 'Agency'. There is also an 'Advanced Search Criteria' section with a 'Sort Results By' dropdown, a 'Traverse Records Only' checkbox, and radio buttons for 'Current Episode' (selected) and 'View Historical'. 'Filter' and 'Clear Form' buttons are at the bottom of the filter section. Below the filter section is the 'Activity Log' section, which shows 'Results: 0 / Page 0 of 0' and a table with columns: Activity Date, Contact Type, Category, Sub Category, Created By, Activity State, and Narrative. The 'Add Activity' button is circled in red.

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.

The screenshot shows the 'Activity Details' screen. At the top, there are four tabs: 'Activity Details', 'Intake Info', 'Participants' (highlighted with a red box), and 'Narrative'. Below the tabs, the 'CASE NAME / ID:' field is pre-populated with a blue box. Below that, the 'Activity Log ID:' field and 'Activity Start Date:' field are also pre-populated with blue boxes.

## Completing a Case Transfer from YNN to a PCSA

**Activity Details**

Create Date: 03/27/2018 10:57 AM Created By: Agency:

Start Activity Date: \* 03/27/2018 Time: AM

End Activity Date: 03/27/2018 Time: AM

Responsible Worker: \* Originator Of Information:

Contact Duration: High Priority

**Contact Types**

Available Contact Types:

- Announced Home Visit
- Collateral
- Court
- Critical Safety Issue
- Education
- Email
- Face-to-Face
- Face-to-Face Visit with Provider(s)

Select Contact Types: \*

Remove Remove All

**Category Information**

Case Category: \* Young Adult Services

Category: \* Case Transfer

Available Sub Categories:

- Case Transfer Summary
- Family/Collateral Notification of Case Transfer
- Kinship Support Plan
- RMS(Random Moment Sample)
- Safety Plan Monitoring Event/Task

Select Sub Categories: \*

Remove Remove All

Other Sub Category:

**Location Information**

Location Type:

Other Location:

Location Details:

Spell Check Clear 250

Activity State: \* Completed

Apply Save Cancel Delete Move

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.

## Completing a Case Transfer from YNN to a PCSA

The screenshot shows the 'Narrative' tab selected in a navigation bar. Below the navigation bar, there are fields for 'CASE NAME / ID' and 'Activity Log ID'. The 'Activity Start Date' is 04/12/2018. There are two tabs: 'Associate Participants' and 'Case Participants'. The 'Case Participants' tab is active, showing a table with columns for 'Contact Status' and 'In Regards To'. The 'Contact Status' dropdown is set to 'None'. Below the table, there is an 'Activity State' dropdown set to 'Draft' and buttons for 'Apply', 'Save', 'Cancel', 'Delete', and 'Move'.

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 screenshot shows the 'Narrative Information' screen. The 'Narrative' field is highlighted with a red box. Below the field, there is a 'Narrative History' table with columns for 'Type', 'Date/Time Created', 'Created By', and 'Agency'. The table contains one row with 'Original' type and '04/13/2018 02:54 PM' date. Below the table, there is an 'Activity State' dropdown set to 'Completed' and buttons for 'Apply', 'Save', 'Cancel', 'Delete', and 'Move'.

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 screenshot shows a web application interface. On the left is a navigation pane with the following items: Case Overview, Activity Log (highlighted with a green box), Intake List, Case Services, Legal Actions, Case Closure, and Agency Case Transfer (highlighted with a red box). The main content area has a green notification bar at the top that says "Your data has been saved". Below that, the case name is "Young Adult Services" and the status is "Open (09/21/2022)". The "Activity Log Filter Criteria" section contains several dropdown menus for "Activity From Date", "Activity To Date", "Case Category", "Contact Type", "Category", "Sub Category", "Activity State", and "Agency". There are also "Filter" and "Clear Form" buttons. Below the filters is an "Advanced Search Criteria" section and a "Sort Results By:" dropdown. At the bottom of the filter section, there are radio buttons for "Current Episode" (selected) and "View Historical". The "Activity Log" section shows a table with one row of data. The table has columns for "Activity Date", "Contact Type", "Category", "Sub Category", "Created By", "Activity State", and "Narrative". The row contains the following data: "09/22/2022", "General", "Case Transfer", "Case Transfer Summary", "Supervisor YNavNet", "Completed", and a narrative icon. Below the table is an "Associated Participants:" section.

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

2. Click **Add Case Transfer**.

The screenshot shows the same web application interface. The navigation pane now has "Agency Case Transfer" highlighted with a blue arrow. The main content area has a "Case Transfer(s)" section with a blue "Add Case Transfer" button circled in red.

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**

## Completing a Case Transfer from YNN to a PCSA

**Case Transfer Details**

Sending Agency: [redacted]  
Case Transfer Effective Date: [redacted] Status:  
Created Date: [redacted] Created By:  
Modified Date: [redacted] Modified By:

**Receiving Agency:** [dropdown]  
**Case Transfer Reason:** [dropdown]

**Case Transfer Summary Information**

Activity Date	Responsible Worker	Transfer Summary Narrative
<a href="#">view</a> 04/04/2018	[redacted]	test test test test <a href="#">unlink</a>

[Link Activity](#)

Additional Comments:  
[text area]

[Spell Check](#) [Clear](#) 2000

[Validate for Approval](#) [Process for Approval](#)

[Save](#) [Cancel](#)

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).

**Unresolved Items for Transfer**

Location	Message
<a href="#">Activity Logs</a>	Draft Activity Logs exists for the case.

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

5. Click **Close**.

**Unresolved Items for Transfer**

Location	Message
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[Close](#)

The **Case Transfer Details** grid appears.

### Processing for Approval

1. Click **Process for Approval**.

## Completing a Case Transfer from YNN to a PCSA

Activity Date	Responsible Worker	Transfer Summary Narrative
09/22/2022	YNavNet, Supervisor	This is the narrative...xxxxxxxx

Link Activity

Additional Comments:

Spell Check Clear 2000

Note: System will only copy active approved non-recommended Family Case Plans / Case Plans.

Validate for Approval **Process for Approval**

Save Cancel

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

**Process Approval**

**Work Item**

ID: [Redacted] Type: CASE Reference: [Redacted]  
Task ID: [Redacted] Task Type: Case Transfer Task Reference: [Redacted]  
Task Status:

**Routing/Approval Action**

Action: \* [Please Select An Action]

Comments: [Text Area]

Agency: [Redacted]

Reviewers/ Approvers: [Please Select A Reviewer/Approver]

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

6. Click **Save**.

**Case Transfer Details**

Sending Agency: [Redacted]  
Case Transfer Effective Date: [Redacted] Status: Pending Approval  
Created Date: 04/05/2018 03:10:22 PM Created By: [Redacted]  
Modified Date: 04/06/2018 01:35:52 PM Modified By: [Redacted]

Receiving Agency:\* [Redacted]  
Case Transfer Reason:\* [Redacted]

**Case Transfer Summary Information**

Activity Date	Responsible Worker	Transfer Summary Narrative
<a href="#">view</a> 04/04/2018	[Redacted]	test test test test test <a href="#">unlink</a>

Additional Comments: [Text Area]

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**.

## Completing a Case Transfer from YNN to a PCSA

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](mailto:SACWIS_HELP_DESK@jfs.ohio.gov).