

Completing a Bridges to PCSA Case Transfer



Knowledge Base Article

Completing a Bridges to PCSA Case Transfer

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Completing a Bridges to PCSA Case Transfer

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 Ohio 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](#).

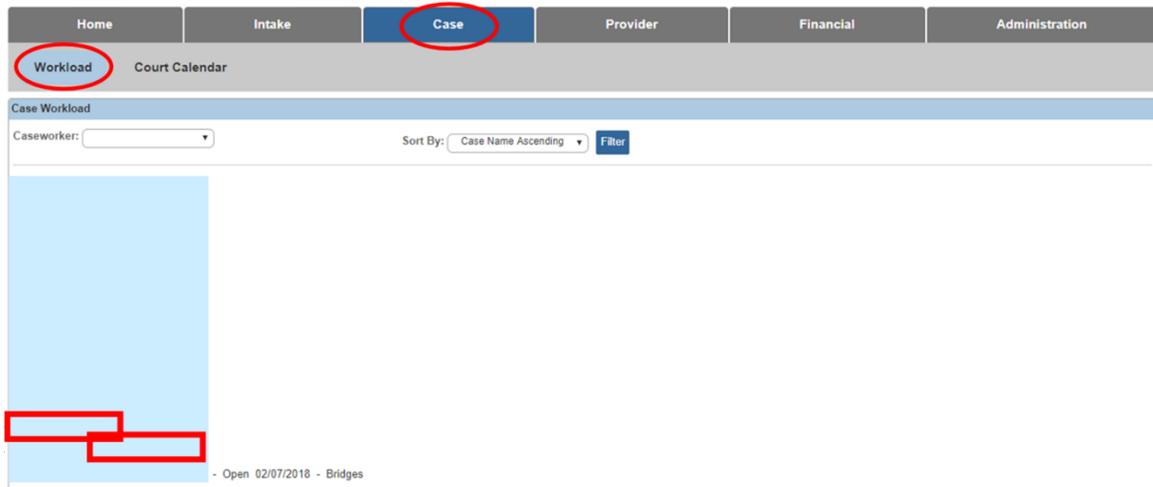
Once the Intake has been created and linked to the Bridges case, the Bridges worker at the sending agency can begin the transfer.

The Transferring Agency

Creating a Case Transfer Activity Log

From the Ohio SACWIS home page:

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



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The **Case Overview** screen appears.

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

The screenshot shows the 'Case Overview' screen. On the left, a navigation pane lists various options, with 'Activity Log' highlighted by a red rectangular box. The main content area displays case information for 'Bridges', including fields for Case Name / ID, Address, Agency, Primary Worker, and Supervisor(s).

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

1. Click, **Add Activity**.

The screenshot shows the 'Activity Log Filter Criteria' grid. The grid contains various filter options such as 'Activity From Date', 'Activity To Date', 'Case Category', 'Contact Type', 'Category', 'Sub Category', 'Activity State', and 'Agency'. Below the filters, there are options for 'Sort Results By' and radio buttons for 'Current Episode' and 'View Historical'. At the bottom of the grid, there is a table with columns for 'Activity Date', 'Contact Type', 'Category', 'Sub Category', 'Created By', 'Activity State', and 'Narrative'. The 'Add Activity' button in the bottom left corner of the table is circled in red.

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**.

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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 screenshot shows the 'Participants' tab selected in the top navigation bar. Below the navigation bar, the case name is 'Bridges / Open (02/19/2018)' and the activity start date is '04/12/2018'. The 'Activity Details' section includes fields for 'Create Date' (03/27/2018 10:57 AM), 'Created By', 'Agency', 'Start Activity Date' (03/27/2018), 'End Activity Date' (03/27/2018), 'Responsible Worker', and 'Originator Of Information'. The 'Contact Types' section shows a list of available contact types, with 'Face-to-Face' selected. The 'Category Information' section shows 'Case Category' as 'Bridges' and 'Category' as 'Case Transfer', with 'Case Transfer Summary' selected in the sub-categories. The 'Location Information' section includes 'Location Type', 'Other Location', and 'Location Details'. The 'Activity State' is set to 'Completed'. At the bottom, the 'Save' button is circled in red.

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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 screenshot shows the 'Associate Participants' screen. At the top, there are four tabs: 'Activity Details', 'Intake Info', 'Participants', and 'Narrative'. The 'Narrative' tab is highlighted with a red box. Below the tabs, there is a header section with 'CASE NAME / ID:' and 'Bridges / Open (02/19/2018)'. Below that, 'Activity Log ID:' and 'Activity Start Date: 04/12/2018'. The main content area has a 'Case Participants' grid. The 'Contact Status' dropdown menu is highlighted with a red box, showing options: None, Attempted, Completed, and In Regards To. Below the grid, there is an 'Activity State:' dropdown menu set to 'Draft'. At the bottom, there are buttons: 'Apply', 'Save', 'Cancel', 'Delete', and 'Move'.

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**.

The screenshot shows the 'Narrative Information' screen. At the top, there are four tabs: 'Activity Details', 'Intake Info', 'Participants', and 'Narrative'. The 'Narrative' tab is highlighted with a blue bar. Below the tabs, there is a header section with 'CASE NAME / ID:' and 'Bridges / Open (02/19/2018)'. Below that, 'Activity Start Date: 03/27/2018'. The main content area has a 'Narrative Information' section. The 'Narrative' text box is highlighted with a red box. Below the text box, there is a 'Narrative History' table with columns: 'Type', 'Date/Time Created', 'Created By', and 'Agency'. The table has one row: 'Original', '04/13/2018 02:54 PM', and two empty cells. Below the table, there is an 'Activity State:' dropdown menu set to 'Completed' and is highlighted with a red box. At the bottom, there are buttons: 'Apply', 'Save', 'Cancel', 'Delete', and 'Move'. The 'Save' button is circled in red.

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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 screenshot shows the 'Activity Log' page. On the left is a navigation pane with various menu items. 'Agency Case Transfer' is highlighted with a red box. The main content area shows the 'Activity Log Filter Criteria' section with fields for 'Activity From Date', 'Activity To Date', 'Case Category', 'Contact Type', 'Category', 'Sub Category', 'Activity State', and 'Agency'. Below these are 'Advanced Search Criteria' and 'Sort Results By' options. At the bottom of the filter section are 'Filter' and 'Clear Form' buttons.

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

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

The screenshot shows the 'Case Transfer(s)' screen. The navigation pane on the left has 'Case Overview' selected. The main content area shows the 'Case Transfer(s)' section with an 'Add Case Transfer' button circled in red. The page header includes 'Home', 'Intake', 'Case', 'Provider', 'Financial', and 'Administration' tabs. Below the header are 'Workload' and 'Court Calendar' buttons. The main content area also shows the 'Case Transfer(s)' section with the 'Add Case Transfer' button circled in red.

Completing a Bridges to PCSA Case Transfer

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 screenshot shows the 'Case Transfer Details' form. The 'Receiving Agency' and 'Case Transfer Reason' dropdown menus are highlighted with a red box. The 'Case Transfer Summary Information' table below shows a single row with the following data:

Activity Date	Responsible Worker	Transfer Summary Narrative
04/13/2018		test test

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**.

The screenshot shows the 'Case Transfer' screen. The 'Receiving Agency' and 'Case Transfer Reason' dropdown menus are highlighted with a red box. The 'Case Transfer Summary Information' table below shows a single row with the following data:

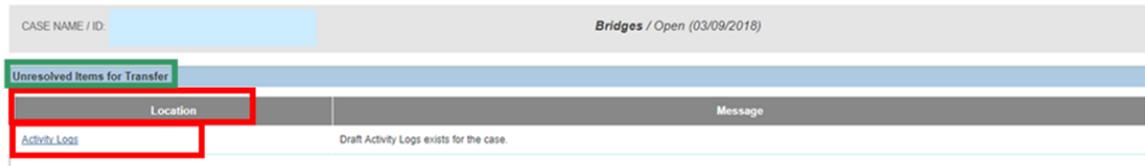
Activity Date	Responsible Worker	Transfer Summary Narrative
04/04/2018		test test test test

At the bottom of the form, the 'Validate for Approval' button is highlighted with a red circle. Other buttons include 'Save', 'Cancel', 'Spell Check', 'Clear', and '2000'.

Completing a Bridges to PCSA Case Transfer

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

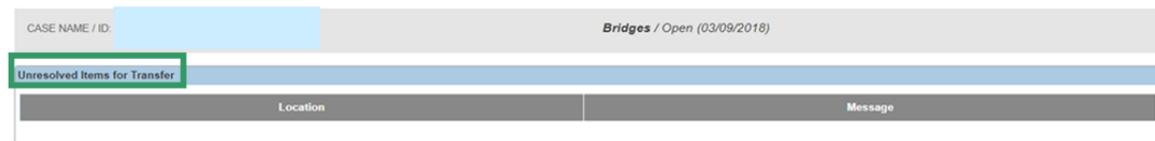
8. Click the link(s) in the **Location** column to correct the item(s).



The screenshot shows a header bar with 'CASE NAME / ID' on the left and 'Bridges / Open (03/09/2018)' on the right. Below this is a blue bar labeled 'Unresolved Items for Transfer'. Underneath is a grid with two columns: 'Location' and 'Message'. A red box highlights the 'Location' column. Below the grid, a message reads 'Draft Activity Logs exists for the case.' There is also a link labeled 'Activity Logs'.

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

9. Click, **Close**.



The screenshot shows the same header bar as above. The 'Unresolved Items for Transfer' grid is empty, with only the 'Location' and 'Message' column headers visible.



The **Case Transfer Details** grid appears.

Processing for Approval

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

The **Process Approval** screen appears.

Important: The Ohio 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**.

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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:

Spell Check Clear 2000

Agency: [Redacted]

Reviewers/ Approvers: Please Select A Reviewer/Approver ▾

Save Cancel

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

6. Click, **Save**.

Case Transfer Details

Sending Agency: [Redacted] Status: Pending Approval

Case Transfer Effective Date: [Redacted]

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
view 04/04/2018	[Redacted]	test test test test unlink

Link Activity

Additional Comments:

Spell Check Clear 2000

Validate for Approval Process for Approval

Save Cancel

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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.

✔ Your data has been changed

CASE NAME / ID: **Bridges**
Open (03/09/2018)

Case Transfer(s) Result(s) 1 to 1 / Page 1 of 1

	Sending Agency	Receiving Agency	Case Transfer Effective Date	Status
edit				Pending Approval

Finalizing the Case Transfer

The Receiving Agency

The Receiving Agency Transfer Administrator will go to the Ohio 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 screenshot shows a navigation menu with tabs for Home, Intake, Case, Provider, Financial, and Administration. Below the tabs are links for Alerts, Action Items, Approvals (circled in red), and Assignments. A 'Pending Approvals' section is visible, containing a table with the following data:

Status	Task
04/18/2018 Pending Approval	(Case Transfer)

The **Case Transfer Details** screen appears.

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

The screenshot shows the 'Case Transfer Details' screen. It includes fields for Sending Agency, Case Transfer Effective Date, Status (Pending Approval), Created Date, Modified Date, Receiving Agency, and Case Transfer Reason. Below this is a 'Case Transfer Summary Information' table with columns for Activity Date, Responsible Worker, and Transfer Summary Narrative. At the bottom, there are 'Additional Comments' and buttons for 'Validate for Approval' and 'Process for Approval' (highlighted in a red box).

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**.

The screenshot shows the 'Process Approval' screen. It includes a 'Work Item' section with ID, Task ID, Type, Task Type, Reference, Task Reference, and Task Status. Below this is a 'Routing/Approval Action' section with an 'Action' dropdown (highlighted in a red box) and a 'Comments' text area. At the bottom, there are 'Agency' and 'Reviewers/ Approvers' dropdowns (the latter highlighted in a red box) and 'Save' and 'Cancel' buttons (the 'Save' button is circled in red).

Completing a Bridges to PCSA Case Transfer

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

Case Transfer(s)				
Result(s) 1 to 1 of 1 / Page 1 of 1				
	Sending Agency	Receiving Agency	Case Transfer Effective Date	Status
view			04/18/2018	Approved

[Add Case Transfer](#)

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 have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).