

August 2015



Early Help Module - Case Transfer

User Guide

To transfer a case to a different Early Help Coordinator you must ensure that the person you wish to transfer the case to is included in the Consent Statement, if they are not, please complete another consent statement.

If you are not the Early Help Coordinator, you will need to pick up the task 'Active Early Help Episode' from their work tray.

Once this is done:

Navigate into the Episode of the case you wish to transfer

A screenshot of the Liquidlogic Children's system interface. The top navigation bar is purple and contains the text 'Liquidlogic Children's' on the left and 'Home Help Menu System Find Leanna Manchip (0)' on the right. Below the navigation bar, the user profile for 'Kira Thorne, 6 years (Case No: 5561)' is displayed. The interface is divided into several sections: 'Personal', 'Name & Gender', 'Addresses', and 'Involvements'. The 'Involvements' section is highlighted with a red circle, and a link for 'Current episode, started 26-May-2015' is visible within it. The 'Personal' section on the left includes a sidebar with options like 'Further Details', 'Photos', 'Risks', and 'Relationships'. The 'Name & Gender' section shows 'Case Number: 5561', 'Surname: Thorne', 'Forename: Kira', and 'Gender: Female'. The 'Addresses' section shows 'Main/Home' and 'Flat At' with the address '19 The Scaurs, Weston-Super-Mare, BS22 6QR'. The 'Involvements' section shows a 'Start New Form' button and a 'Start' button.

Navigate into the 'Active Episode' box and then the 'Involvements' tab. Click the link 'Initiate Case Transfer Process'

Active Early Help Episode
 Active Task: Leanna Manchip (Reassign) Started: 29-May-2015 Due: unspecified

Active Early Help Episode | Decisions | Task Details | All Children (2) ▼

Episode Details
 Personal Details
 Activities
Involvements
 Case Notes
 Documents
 Services
 Consent
 Access Requests

Access

Role	Worker or Team	Start Date	End Date	Access Level
Other Role	Ms Sadie Hall	19-Jun-2015		Full Access
Other Role	Early Help Admin Group	19-Jun-2015		Full Access
Other Role	Early Help Admin Group	29-May-2015	19-Jun-2015	Full Access
Early Help Coordinator	Leanna Manchip	26-May-2015		Full Access

▶ Add Access

Case Transfers

▶ Inhabit Case Transfer Process

Complete the form and ensure that the 'Point of Transfer' page is completed with the date you wish to transfer the case from and who you want to become the new Early Help Coordinator

Once this is done click the button 'Send to Receiving Team'

Point of Transfer

The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the appropriate transfer process in Protocol has been completed by the manager of the receiving team.

Proposed Date For Transfer Of Case: 13-Jul-2015

Now reassign this form to the **Receiving Team Manager** of the receiving team.

Receiving Practitioner, Department or Group: Ms Sadie Hall X

Access Check:

- Ms Sadie Hall has access to the process
- Soraya Thorne
- Ms Sadie Hall has access to the process

Buttons: Save | Send to Receiving Team | Cancel | Close

You will then be able to see that the task is in the new Early Help Coordinators work tray.

Active Early Help Episode
 Active Task: Leanna Manchip (Reassign) Started: 29-May-2015 Due: unspecified

Active Early Help Episode | Decisions | Task Details | All Children (2) ▼

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▶ Add Access

Case Transfers

Assessment Date	Assessment Type	Assessor	Status	Current Task Assignment
13-Jul-2015 09:22	EHM Case Transfer	Leanna Manchip	Draft	Ms Sadie Hall

The screenshot shows the Liquidlogic Children's interface. On the left is a navigation menu with categories like Worktray, Manager Tray, and various support roles. The main area displays a list of cases. A red arrow points to the entry for Soraya Thorne, 15 years (Case No: 5560), which is marked as an 'EHM Case Transfer'.

The new Early Help Coordinator will have to enter their name in Section 2 and then click the button 'Complete Case Transfer' before the case and it's tasks are transferred in EHM.

This screenshot shows the 'EHM Case Transfer' form for Soraya Thorne, 15 years (Case No: 5560). The form is divided into sections. A red arrow points to the 'Record new coordinator' section, where 'Leanna Manchip' is selected as the new coordinator. Another red circle highlights the 'Complete Case Transfer' button at the top right of the form.

2. Record new coordinator and team
 This form must be completed within 24 hours of the agreed point of transfer. If the transfer does not go ahead as planned you must return to section 1 and record the revised date of transfer.
 By completing this form you are confirming that case transfer has been completed successfully. For a checklist of the actions that should have taken place as part of this transfer please refer back to section 2 of this form.

Record new location of paper files

Record new Coordinator: **Leanna Manchip**

Professional Role	Assigned To	Re-assign To	Actions
<input type="radio"/> Early Help Coordinator	Leanna Manchip	Leanna Manchip	
Active Case within a School (Started: 28-May-2015, Due: 28-May-2015)			
Start/Update Case Notes (Started: 28-May-2015, Due: 28-May-2015)			
Active Early Help Episode (Started: 29-May-2015, Due: No due date)			
Early Help Assessment - Please complete Early Help Assessment for Person (Started: 30-Jun-2015, Due: No due date)			
Early Help Assessment (Started: 30-Jun-2015, Due: No due date)			
Create Plan (Started: 30-Jun-2015, Due: No due date)			
Outcomes Tracking Tool (Started: 13-Jul-2015, Due: No due date)			
Kira Thorne			
Professional Role	Assigned To	Re-assign To	Actions
<input type="radio"/> No Role	High Impact Families	Click here to select a user...	
Please complete the Referral (Started: 27-May-2015, Due: No due date)			
<input type="radio"/> Early Help Coordinator	Leanna Manchip	Leanna Manchip	