

Case Name: _____

Case Transfer Staffing Date: _____

Case Manager: _____

Case Manager Supervisor: _____

Case Transfer Protocol Checklist

*Please complete this checklist whenever you are being transferred a new case from investigations.

*This form must be completed and signed by the supervisor within 72 hours from the CTS and submitted to the assistant program director.

Before CTS:

- Review case documents in FSFN with your supervisor and write down questions to be asked at the case transfer staffing. (Family Functioning Assessment, Interim Placement Report, Shelter Order, Shelter Review Order, Case Notes, ICWA, etc.)
- Set calendar reminders for already scheduled court hearings, appointments, meetings, etc.

Attend the CTS:

- Ask questions that were written from the pre-CTS case review.
- Provide the parents with contact information (emergency contact and chain of command).
- Give the parents any helpful literature to understand dependency.
- Explain the next steps for the parents (PCMC, Arraignment, CPC, Visitation, etc.)
- Provide the parents with early service referrals that are agreed upon by the CMS.

After CTS:

- Schedule the first home visit to occur within 48 hours.
- Verify/Update the placement tab in FSFN.
- Verify that the children have Medicaid coverage.
- Verify/Schedule the children for their initial 72 hour medical exam.
- Update the children's medical and educational tabs in FSFN (daycare can be entered too).
- Verify/Enroll children in school or daycare.
- Provide school readiness vouchers and make sure transportation is arranged for kids.
- Verify that CBHA's have been requested for children who are required to have them.
- Schedule parent/sibling visits and create a visitation plan.
- Ensure that each child has a child resource record folder (shelter order, custody letter, health & safety checklist, 5339, etc.)
- Schedule the case plan conference. Inform the parent to bring proof of all income and monthly expenses so a budget form can be completed.
- Create a drop folder for the case (shelter order, shelter review order, shelter petition, FFA, ICWA, face sheets, referrals, etc.).
- Scheduled the first full supervisor review for the case.
- Refer the children for any services needed (counseling, evaluations, CMS, etc.)
- Review and complete family finding efforts if necessary. The more the better for respite care and family support systems.
- Ensure that a RCG application has been submitted if applicable.

Case Manager: _____

Supervisor: _____