

Bridges Case Transfer Guide

These instructions pertain to the following case transfers:

PCSA YAS Case to Bridges Case

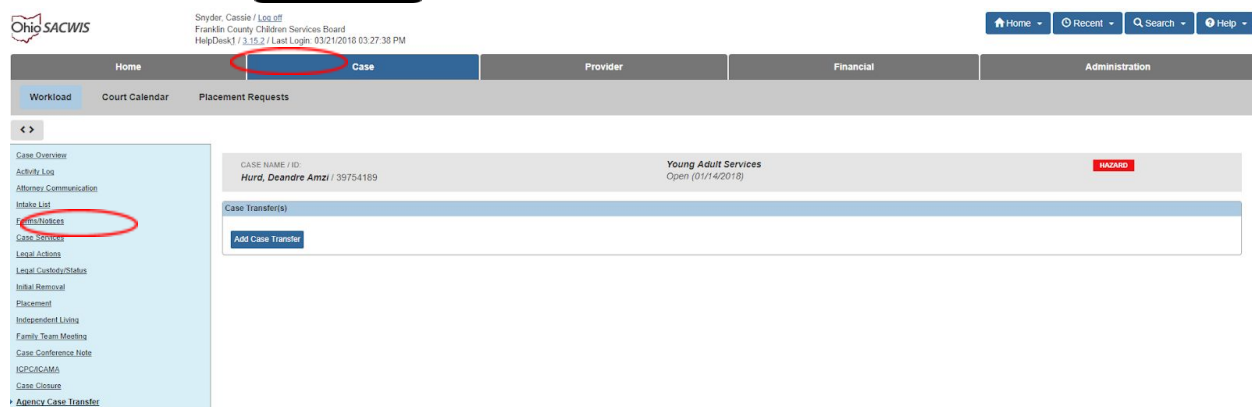
Bridges Case to PCSA YAS Case

Bridges Regional Agency to Bridges Regional Agency

Before a transfer can be completed, the transferring agency of the current case must complete any outstanding items in their case, such as activity logs, plans and case services. The agency receiving the case must complete an Intake and link it to case being transferred.

Once the outstanding items have been completed, the transferring agency of the current case will initiate the case transfer using the following steps:

Click the “Agency Case Transfer” in the left navigation box. Click “Add Case Transfer” button.



Select a “Receiving Agency” and “Case Transfer Reason”. Complete a Case Transfer Activity Log which will either pull into the case automatically or can be added by clicking the “Link Activity” button. Once, these items are complete, click the “Validate for Approval” button to show if any outstanding items still need completed. If no outstanding items, click “Process for Approval” button to route to

Supervisor.

Ohio SACWIS
Snyder, Cassie / Log off
Franklin County Children Services Board
HelpDesk1 / 3.15.2 / Last Login: 04/04/2018 09:30:11 AM

Home Recent Search Help

Case > Workload > Case Transfer

CASE NAME / ID: **Hurd, Deandre Amzi** / 39754189 **Young Adult Services / Open (01/14/2018)**

Case Transfer Details

Sending Agency: Franklin County Children Services Board

Case Transfer Effective Date: Status:

Created Date: Created By:

Modified Date: Modified By:

Receiving Agency: Bridges Northeast Agency

Case Transfer Reason: Agency Request

Case Transfer Summary Information

Activity Date	Responsible Worker	Transfer Summary Narrative
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[Link Activity](#)

Additional Comments:

Spell Check Clear 2000

Validate for Approval Process for Approval

Save Cancel

The Supervisor will then route the case transfer to the appropriate receiving agency PCSA Supervisor or Bridges Regional Coordinator and then click “Save” button.

Ohio SACWIS
Harris, Kathy / Switch Profile / Log off
Bridges Northeast Agency
HelpDesk1 / 3.15.2 / Last Login: 04/06/2018 01:49:40 PM

Home Recent Search Help

Home Intake Case Provider Financial Administration

Alerts Action Items Approvals Assignments

Process Approval

Work Item

ID:	39754189	Type:	CASE	Reference:	Hurd, Deandre Amzi
Task ID:	3350001	Task Type:	Case Transfer	Task Reference:	
				Task Status:	Pending Approval

Routing/Approval Action

Action: Please Select An Action

Comments:

Spell Check Clear 2000

Agency: Bridges Northeast Agency

Reviewers/ Approvers: Please Select A Reviewer/Approver

Routing/Approval History

Date	Action	Status	Employee ID	Name
04/06/2018 01:51 PM	Route	Pending Approval	8994402	Snyder, Cassie

1 Result(s)

Save Cancel

The receiving agency PCSA Supervisor or Bridges Regional Coordinator approves the case transfer by clicking on the link for the case under Approvals.

Ohio SACWIS Harris, Kathy / Switch Profile / Log off
Bridges Northeast Agency
HelpDesk | 3.15.2 | Last Login: 04/06/2018 01:13:53 PM

Home Recent Search Help

Home Intake Case Provider Financial Administration

Alerts Action Items Approvals Assignments

Pending Approvals

Needs Approval

Status	Task
04/06/2018 Pending Approval	[39754189] [Case/Hurd, Deandre Amz] - [3355000] [Case Transfer]
04/05/2018 Pending Approval	[7584503] [BROOKINSON, SERENA] - [7980] [Bridges Application]

Bridges Application

For the receiving agency to Final Approve the case transfer, click the “Process for Approval” button.

Ohio SACWIS Harris, Kathy / Switch Profile / Log off
Bridges Northeast Agency
HelpDesk | 3.15.2 | Last Login: 04/06/2018 01:13:53 PM

Home Recent Search Help

Case > Workload > Case Transfer

CASE NAME / ID: Hurd, Deandre Amz / 39754189 Young Adult Services / Open (01/14/2018)

Case Transfer Details

Sending Agency: Franklin County Children Services Board

Case Transfer Effective Date: Status: Pending Approval

Created Date: 04/06/2018 01:10:49 PM Created By: Snyder, Cassie

Modified Date: 04/06/2018 01:10:49 PM Modified By: Snyder, Cassie

Receiving Agency: Bridges Northeast Agency

Case Transfer Reason: Agency Request

Case Transfer Summary Information

Activity Date	Responsible Worker	Transfer Summary Narrative
04/06/2018	Carter, Kimberly A.	Case services summary.

Link Activity

Additional Comments:

Spell Check Clear 2000

Validate for Approval Process for Approval

Save Cancel

Then select “Approved-Final” as the “Action”, enter any comments if needed, select your agency, and select your name. Then click the “Save” button

Home	Intake	Case	Provider	Financial	Administration
Alerts	Action Items	Approvals	Assignments		

Process Approval

Work Item

Case ID:	39754189	Type:	CASE	Reference:	Hurd, Deandre Amzi
Task ID:	3350001	Task Type:	Case Transfer	Task Reference:	
				Task Status:	Pending Approval

Routing/Approval Action

Action: * Approved - Final

Comments:

Agency: Bridges Northeast Agency

Reviewers/ Approvers: Harris, Kathy

Routing/Approval History

Date	Action	Status	Employee ID	Name
04/06/2018 01:51 PM	Route	Pending Approval	0994402	Snyder, Cassie

1 Results

Save Cancel

Once the receiving PCSA Supervisor or receiving Bridges Regional Coordinator Final Approves the case transfer, the case category will change.

Case > Workload > Case Transfer

CASE NAME / ID: **Hurd, Deandre Amzi** / 39754189 Bridges / Open (01/14/2018)

Case Transfer Details

Sending Agency:	Franklin County Children Services Board	Status:	Approved
Case Transfer Effective Date:	04/04/2018		
Created Date:	04/04/2018 10:34:54 AM	Created By:	Snyder, Cassie
Modified Date:	04/04/2018 10:42:22 AM	Modified By:	Colbert, Latasha

Receiving Agency: * Bridges Northeast Agency

Case Transfer Reason: * Agency Request

Case Transfer Summary Information

Activity Date	Responsible Worker	Transfer Summary Narrative
04/04/2018	Colbert, Kimberly, A.	Summary of working with the young adult.

Link Activity

Additional Comments:

Spell Check Clear 2000

Validate for Approval Process for Approval

Close