

P-2376 Electronic Case Files (continued)

P-2376G Transferring Case Files Between Districts (B21-08)

Notifying other district of transfer

Participant notifies the current case manager they are moving

As soon as it is known that the participant will be transferring to another district, the Reach Up Supervisor should notify the "receiving" district office.

If a new case manager has been assigned, put the case in the case manager's number in ACCESS.

If the new case manager is not yet known, put the case in the Reach Up Supervisor's number in ACCESS.

You can find a worker number in ACCESS by going to NAME/D.

Participant moves but does not notify the current case manager

The Reach Up Supervisor in the "receiving" district will need to request the file from the Reach Supervisor in the former office.

Responsibilities of the Reach Up Case Manager

Before sending the file to the new district the current Reach Up Case Manager should:

- Make sure all case notes are complete;
- Write a summary in case notes that includes:
 - *Current issues that need to be addressed (for example, there is a current conciliation resolution or sanction); and*
 - *Any other updates that the case manager would find helpful if they were about to begin working with the participant.*
- Pay all support services they have agreed to pay and document them in case notes;
- If the family is currently conciliated or sanctioned, try to resolve before the transfer is made.

- If the current case manager is not able to resolve the conciliation or sanction the current plan should be documented in case summary.
- *The new case manager and the participant should review the conciliation and sanction at their first meeting. The new case manager and participant can make the new plan to cure their conciliation or sanction if the current plan is no longer appropriate.*
- Organize both the electronic file according to Reach Up Services procedure P-2375E; and
- Purge the paper file:
 - All documents that can be removed and shredded should be.
 - All existing paper documents should be secured in the file according to P-2375E.

Responsibilities of the Reach Up Supervisor

Before sending a file to the new district the current Reach Up Supervisor should:

- Review the case file to ensure the file is in proper order; and
- Create a Compressed (zipped) folder of the electronic file and send the Compressed (zipped) folder to the supervisor in the new district (see instructions below).

Transfer of paper files

Files can be transferred at joint meetings or via Operations Directors.

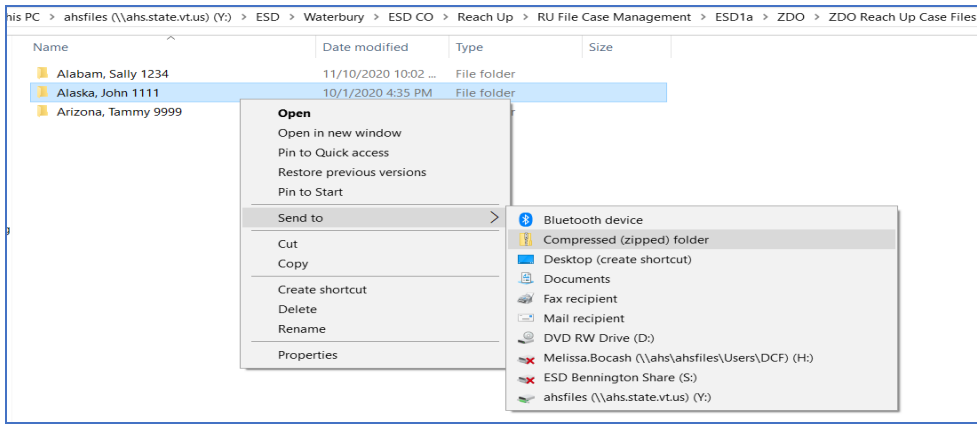
Files cannot be sent via mail.

When the case file reaches the new district, the case must be logged into the incoming file log, including the name and SSN of the case and the date it was received.

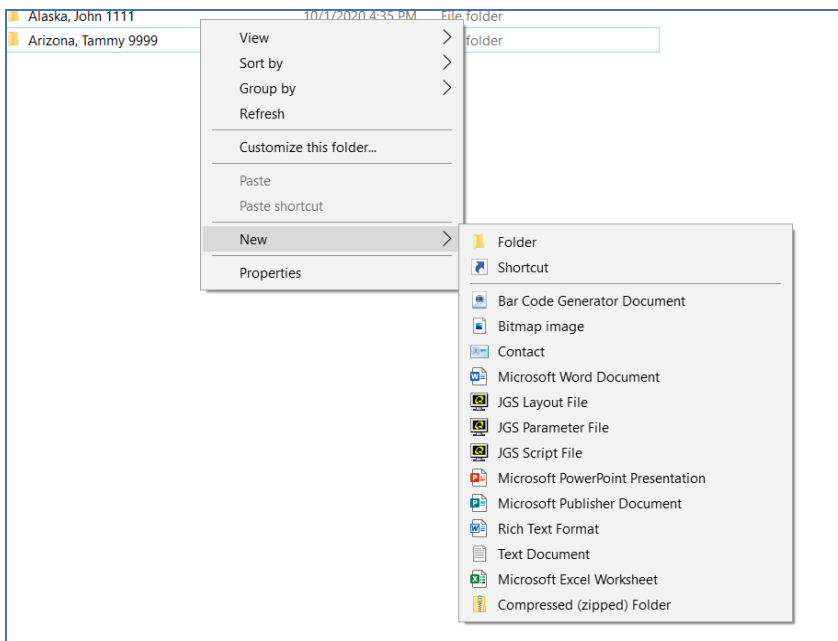
Case Manager/Supervisor support

Creating and sending a compressed file

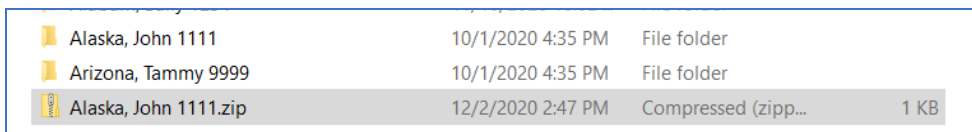
To create a Compressed (zipped) folder, right click on the folder, select "Send To" and then select "Compressed (zipped) folder."



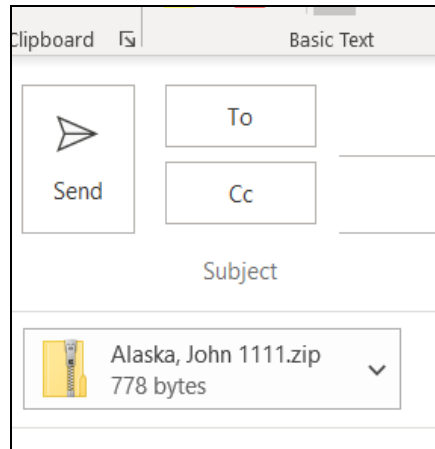
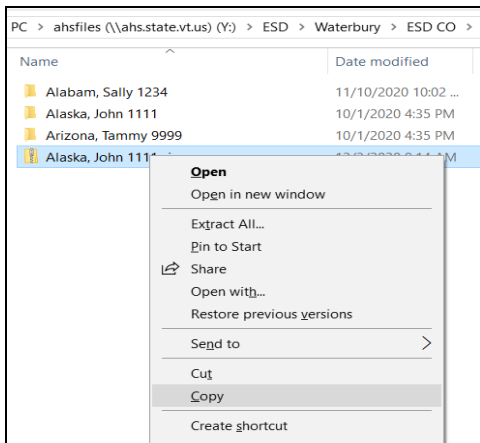
The "Compressed (zipped) Folder" function may also be found by selecting "New" if "Send to" does not appear.



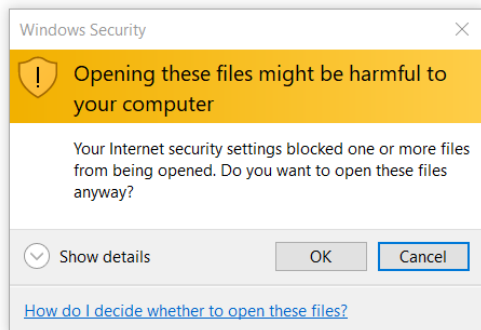
The "Compressed (zipped) Folder" will appear at the bottom of the list of folders.



Right click on the zip file, select "copy", then paste the zip file into an email.



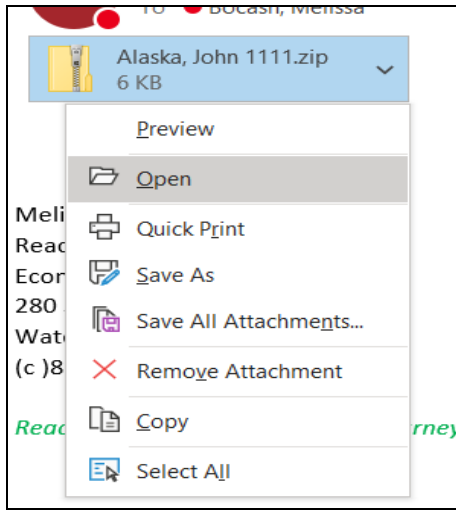
When trying to copy the zip file you may encounter a message that says “opening these files might be harmful to your computer” you can proceed by selecting okay.



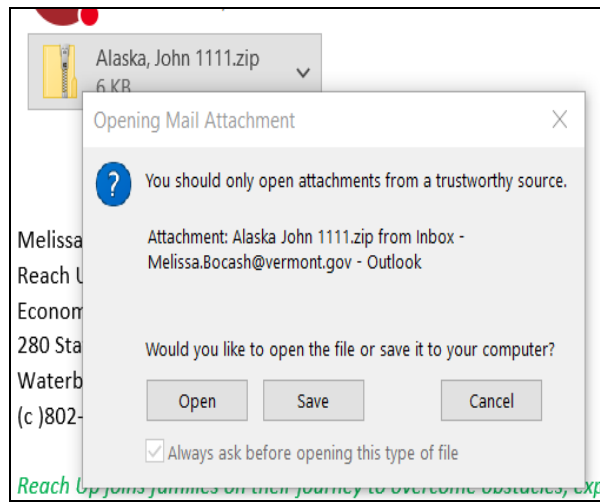
Opening and saving a compressed file

When the supervisor in the new district receives the zip file, they will need to unzip the file before it can be saved.

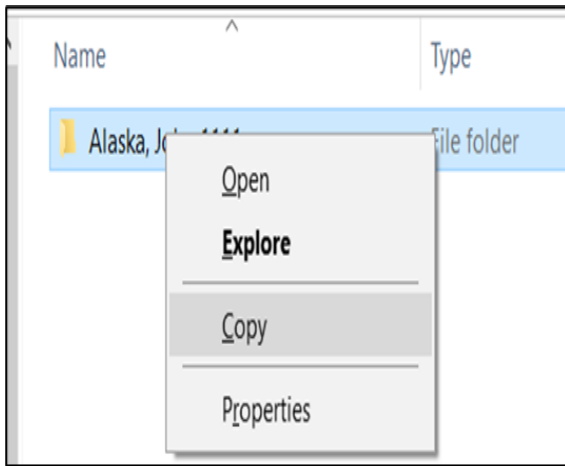
One option to unzip the file is to open the file attached to the email. Open the file by double clicking or right clicking the file.



OR



The folder will automatically open unzipped. Copy the folder and save it to the correct folder.



Once you have saved the "unzipped" (normal) file, delete the "zipped" version that had been saved in their district's shared folder as well.

Finally, email the sending supervisor so they can delete the zip file on their end as well.