

How do I...

Case Transfer Staffing (ESI) Meeting Type2
Case Transfer Tickler2
Create Case Transfer Staffing2

How Do I...?	Selections	Tips & Guidelines
<p>Create Case Transfer Staffing</p>	<ul style="list-style-type: none"> ▪ From the Desktop menu option, select Create > Case Work > Meeting > Case Transfer Meeting (ESI). ▪ Select a Case and Case Participant and click Create. ▪ The Type field is pre-filled. ▪ Complete all required fields in the Meeting Session Details group box. ▪ Enter a statement in the Meeting Issues/Statements group box. ▪ In the Case Transfer Staffing Acceptance group box, enter Date Accepted and Time Accepted. 	<p><i>Department of Children and Families (DCF) Policy states that a Family Assessment must be completed within 15 Working days from the date of the Case Transfer Staffing</i></p> <p>NOTE: 'Reports' use business days, while the application calculates ticklers based on calendar days.</p> <p><i>When a meeting type of Case Transfer Staffing (ESI) has been created from the Case Work page, the following fields in the Case Transfer Staffing Acceptance group box will become visible to the worker.</i></p> <ul style="list-style-type: none"> ▪ <i>Date Accepted</i> ▪ <i>Time Accepted</i> ▪ <i>Case Accepted Checkbox (in the header group box)</i>
<p>Case Transfer Tickler</p>		<p><i>Based on the Date of Case Transfer Staffing, Case Transfer Staffing is the point at which the case is transferred from the Investigative stage to Ongoing Services.</i></p> <p><i>The Primary Worker has 19 Calendar Days from the date of the Case Transfer Staffing to complete the Family Assessment. Completion means that the Supervisor of the Primary Worker has approved the Family Assessment.</i></p> <p><i>The tickler will be generated when the Case Transfer Staffing is completed and the Case Accepted checkbox is checked and the page is saved.</i></p>
<p>Case Transfer Meeting (ESI) Meeting Type</p>	<ul style="list-style-type: none"> ▪ In the Date Accepted field, enter a date. ▪ In the Time Accepted field, enter a time. 	<p><i>When a meeting type of Case Transfer Meeting (ESI) has been created from the Case Work page, the Case Accepted checkbox will become visible to the worker in the header group box and the Case Transfer Staffing Acceptance group box will become visible to the worker and will contain the following fields:</i></p> <ul style="list-style-type: none"> ▪ <i>Date Accepted</i> ▪ <i>Time Accepted</i> <p><i>The worker documents the date and time that the Ongoing Services Unit accepted the Case Transfer Staffing packet.</i></p> <p><i>The Date Accepted and Time Accepted fields are not required. However, when entered by the worker and the Case Accepted checkbox is checked the entire Meeting page will be frozen and a tickler will be generated for the Family Assessment due date upon the save.</i></p>

How Do I...?	Selections	Tips & Guidelines
		<p><i>In the instance that the Case Transfer Meeting (ESI) has been completed and case acceptance is pending the user can check the Meeting Completed checkbox in the page header. When the Meeting Completed checkbox is checked and the worker clicks the save button the Meetings page will be frozen, leaving the Case Transfer Staffing Acceptance group box and the Case Acceptance checkbox enabled.</i></p>

This page intentionally left blank