Best Practices for Case Transfers, Covering Vacant Caseloads, and Discharge Summaries

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Purpose:
To provide staff with tips/best practices related to case transfers, vacant caseloads, and discharge summaries.

Case Transfers – Best Practices:
- The current counselor should complete a case note including highlights of the case, important information to know, outstanding issues, and next steps.
- Don't develop an IPE for someone prior to transfer just to get it done. It may be more appropriate for the new counselor to develop the IPE.
- As a first step, the new counselor should review the transfer case note and meet with the consumer to verify that everyone is in agreement.

Vacant Caseloads – Best Practices:
- Vacant cases should be assigned to a counselor so that the consumer has a point of contact and is actively engaged with VR.
- Ideally, vacant cases assigned to a counselor should be included on that counselor's notification list. However, WDA can decide how to handle the assignment process.
    - Placing on notification list can assist with the tracking of the consumer and accurately reflects the caseload size of the counselor.

Discharge Summaries – Best Practices:
- As part of a status 28 closure, include a summary of important case information that would be helpful for a counselor if the consumer were to come back for additional services.