

Case Transfer Process

Updated June 2014

Purpose:

To provide DVR staff with the process for transferring consumer cases across WDAs.

Rationale:

There are times when a case will need to be transferred across WDAs. Common courtesy and proper documentation require that the following steps are taken when transferring a case across WDA.

Process:

- Originating counselor requests their WDA Director to consider transferring the case.
- Originating office WDA Director instructs counselor to bring case up to date: update IPE, complete any outstanding purchase orders, etc., if possible. If not possible, give a summary of the current status in a case note.
- Originating WDA Director contacts receiving WDA Director, and they discuss the transfer. If both WDA Directors concur:*
- Receiving WDA Director names a counselor.
- Originating WDA Director emails receiving WDA Director with request.
- Receiving WDA Director emails back acceptance of transfer.
- Receiving WDA Director notifies consumer of transfer.

*If originating WDA Director and potential receiving WDA Director cannot agree on transfer, consult with BCS Director or BCS Assistant Director in the process of making a decision. Then, proceed with steps as above if decision is to transfer.

See also: [Best Practices for Case Transfers, Covering Vacant Caseloads, and Discharge Summaries](#).