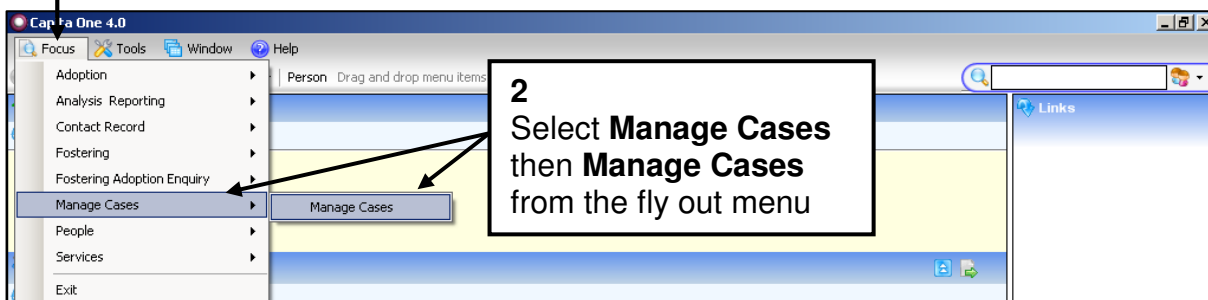


How to allocate or transfer a case from one Social Worker to another

To either allocate a case currently held in your name or to transfer a case from one worker to another:

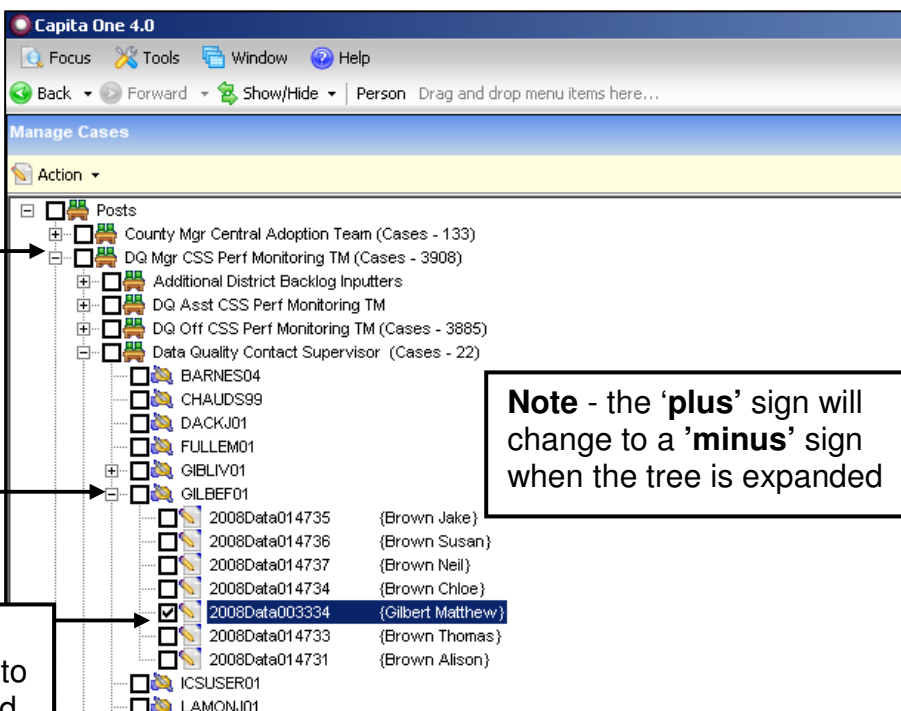
1
Click **Focus** menu



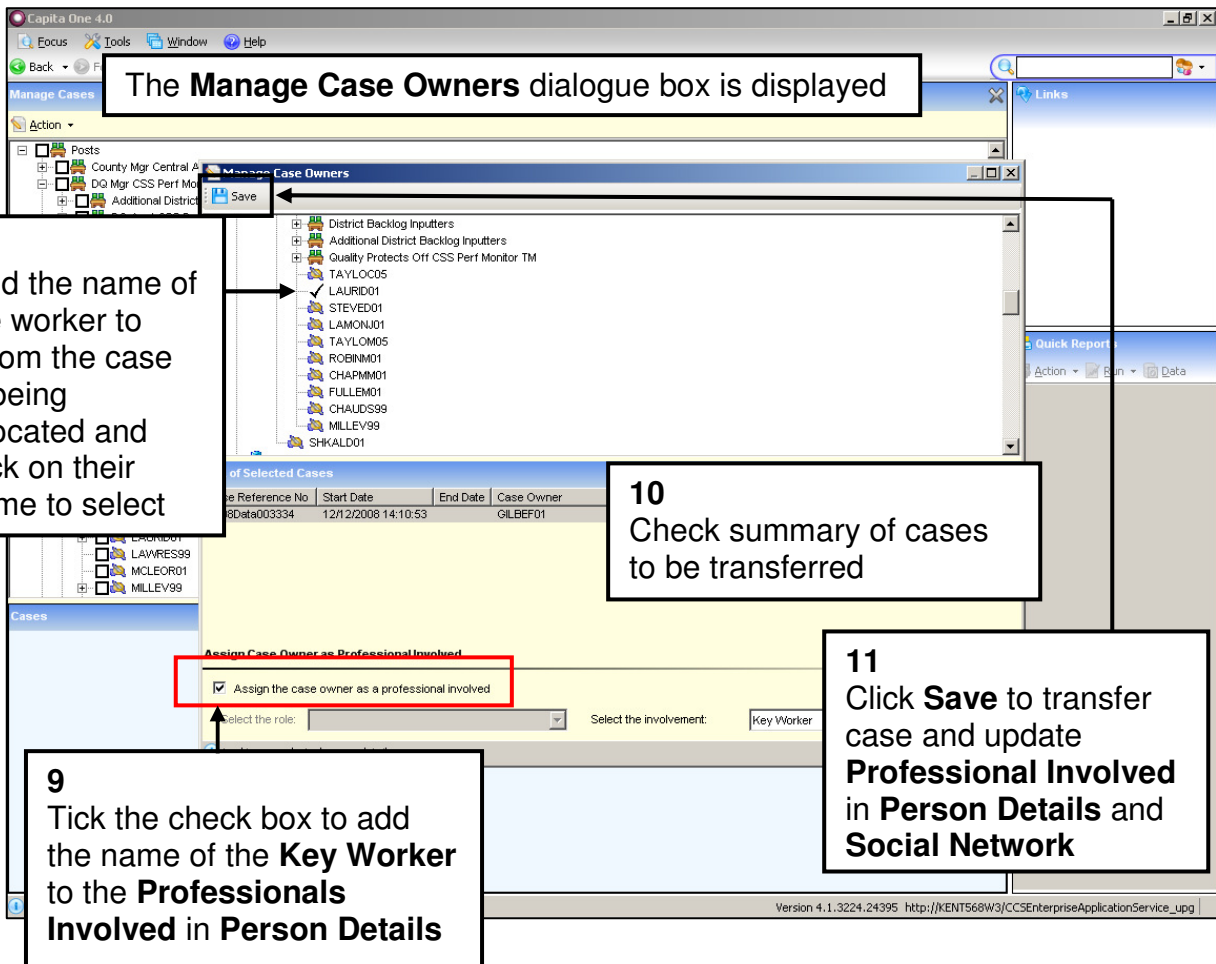
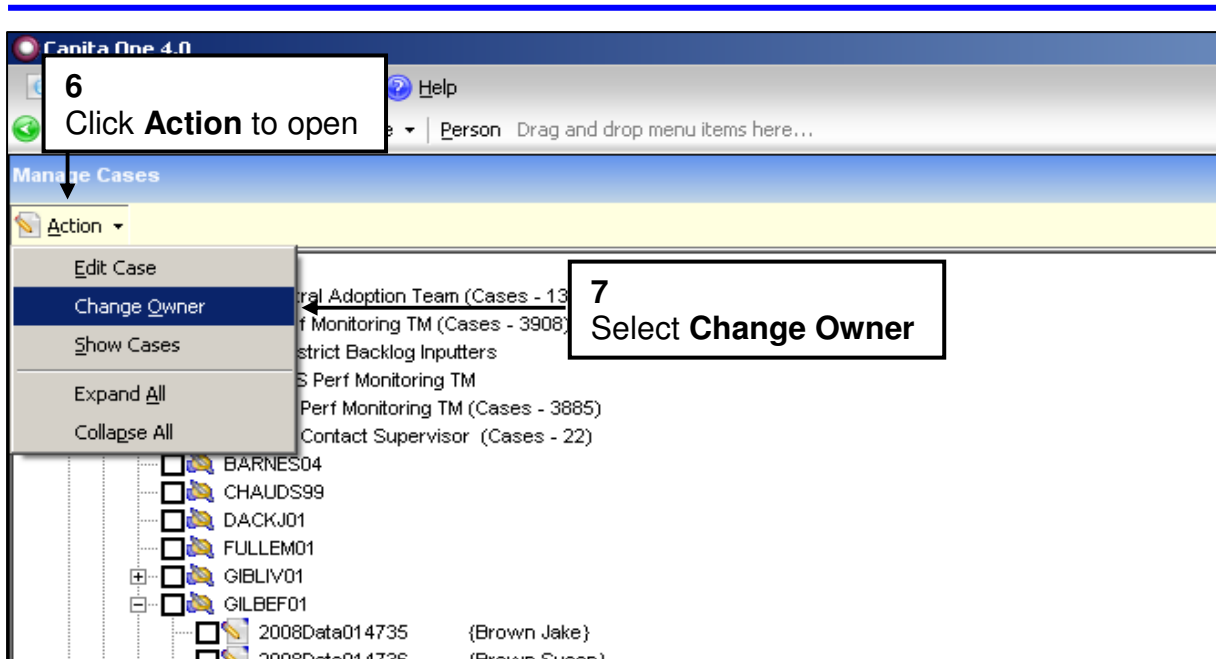
3
Expand the team by clicking the plus sign to the left of the team name

4
Click to open the caseload of the worker to whom the case is currently allocated

5
Select the case or cases to be allocated or transferred by clicking in the check box to the left of the child's name



Important – it is the responsibility of the receiving team to transfer cases in from another team (i.e. when a case is transferred from the Duty Team to the Long-team Team) to show that they have accepted the cases



Note – the **Action** menu can also be accessed by right clicking over the case details

On saving the **Manage Case Owners** dialogue box closes and the hierarchy view in the team structure returns to the collapsed view. The transferred case will now display in the new worker’s caseload in their **My Cases** panel on their **Home Page**.