# ACTIONS - Transfer Case Logic Map

Establish Case number

User will indicate:

Servicing Worker (who are we transferring to)

Within county or out of county

Reason for transfer

Action taken

Requested verifications

If METS case is active and METS number

If the resident is being transferred outside of Hennepin County

Per POLI TEMP TE02.08.095 CASE NOTE III: CLAIMS/SYSTEMS/TRANSFERS the following information should be included in the case note when transferring to another county:

Note date of client's move

New address

Whether the client has entered or left excluded time.

List all pending verifications and case actions.

Note any unresolved DAIL messages or IEVS matches.

Note any expected changes in household's circumstances.

Indicate if any income reports/recertifications are outstanding.

list the action to be taken by the new worker (such as reevaluate as HH of 1 for SNAP and open on MA-AX, or reevaluate as HH of 2 and open on PX).

if the client is pregnant select if the verification has been received or sent.

using REPT/USER the script will identify the new worker or agency on the receiving and will send a SPEC/MEMO to the client informing them of their new worker or agency

The script includes a "NAV to SPEC/XFER" button as well as options to manually set the County of Financial Responsibility and select if the County of Financial Responsibility is not changing. If these check boxes are left alone, the script will assume that the County of Financial Responsibility changes on the first day of the next month after two full months

The new address MUST be in the case before the script is run or you will be sending a MEMO to the client's old address.

# Exclusions:

If the worker is attempting to transfer the case to X127CCL the script will restrict this action.

The script will only case note out of county or if indicated by worker for in county transfers.

MNPrairie Bank Support - MNPrairie Bank cases all go to Steele (county code 74)'s ICT transfer.

Agencies in the MNPrairie Bank are Dodge (county code 20), Steele (county code 74), and Waseca (county code 81)

On or after 12/13/21, if you need to transfer a case to Grant or Pope counties (WPHS), use the inter-county transfer ID previously used by Pope County: X161ICT.  Grant County – use the inter-county transfer ID previously used by Pope County: X161ICT Pope County -remains the same. Online edits will be added to SPEC/XFER to prohibit the transfer of cases to X126 ID numbers.  Section TE02.08.195 (WESTERN PRAIRIE HUMAN SERVICES-CASE TRANSFER) has been added to the POLI TEMP manual to provide information about transferring cases to Western Prairie Human Services

IF servicing\_worker = "X120ICT" OR servicing\_worker = "X181ICT" THEN servicing\_worker = "X174ICT"

IF servicing\_worker = "X126ICT" THEN servicing\_worker = " X161ICT "

 Script will gather:

Servicing worker agency name

Programs applied for

Confirmation of transfer

# STAT coordinates

|  |  |  |
| --- | --- | --- |
| **Information** | **Screen** | **Coordinates (varchar, row, col)** |
| EMReadScreen worker\_agency\_name | REPT/USER | 43, 8, 27 |
| mail\_addr\_line\_one |  | 43, 9, 27 |
| mail\_addr\_line\_two |  | 43, 10, 27 |
| mail\_addr\_line\_three |  | 43, 11, 27 |
| mail\_addr\_line\_four |  | 43, 12, 27 |
| worker\_agency\_phone |  | 14, 13, 27 |
| worker\_county\_code |  | 2, 15, 32 |
| cash1\_app\_date | STAT/PROG | 8, 6, 33 |
| cash2\_app\_date |  | 8, 7, 33 |
| emer\_app\_date |  | 8, 8, 33 |
| grh\_app\_date |  | 8, 9, 33 |
| snap\_app\_date |  | 8, 10, 33 |
| ive\_app\_date |  | 8, 11, 33 |
| hc\_app\_date |  | 8, 12, 33 |
| cca\_app\_date |  | 8, 14, 33 |
| cash1\_status\_check |  | 4, 6, 74 |
| cash2\_status\_check |  | 4, 7, 74 |
| emer\_status\_check |  | 4, 8, 74 |
| grh\_status\_check |  | 4, 9, 74 |
| snap\_status\_check |  | 4, 10, 74 |
| ive\_status\_check |  | 4, 11, 74 |
| hc\_status\_check |  | 4, 12, 74 |
| cca\_status\_check |  | 4, 14, 74 |
| cash1\_prog\_check |  | 2, 6, 67 |
| cash2\_prog\_check |  | 2, 7, 67 |
| emer\_prog\_check |  | 2, 8, 67 |
| Navigating into spec/xfer | SPEC/XFER | “X” 7, 16 |
| servicing\_worker |  | 18, 61 |
| worker\_check |  | 9, 24, 2 |
| transfer\_confirmation |  | 16, 24, 2 |