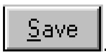
CRIB SHEET – TRANSFERRING A CLIENT'S KEY TEAM

This crib sheet should be used where a client's key team is changing and Swift needs updating.

When transferring key team you need to be aware of:

- Ending existing key team involvement;
- Recording new key team involvement;
- Updating any current ongoing provisions;
- Updating Paper File Location.

Ending Existing Key Team Involvement

- Click on  (Involvements).
- Click on the key team involvement that needs to be ended. Be careful to click on the correct one to ensure that you do not close of the wrong involvement.
- Remove the tick from the Key Team field.
- Enter the date the involvement ended in the End Date field.
- Click on .

  Note: *the involvement role entered will be automatically ended.*

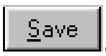
Recording New Key Team Involvement

- Press .
- Complete the following fields:

  Start Date
  Enter the date the referral was made.

  Involvement
  Ignore this field as team involvement is recorded in the Organisation field.

  Organisation
  Enter the team the case is being allocated to.

  Key Team
  Click in the Key Team box.
- Click .

Updating Provisions

If the client is receiving costed services, the cost centre must be changed to that of the new team.

For each ongoing service in CPC you must:-

- Record an end date of the day before the transfer on the Schedule/Non Schedule screen, to end the costs for the transferring team's cost centre.
- Record a new scheduled/non scheduled service, with the new receiving team's cost centre, starting on the day of the transfer.
- You will need to send any new schedules/non schedules recorded for authorisation.

Updating Paper File Location

Where the case is transferring key team you need to update the paper file location.

Ending the Paper File Location

- Click on F'sheet (Frontsheet).
- Click on Further Details.
- Click on P Files (Paper File Location).
- Complete the following fields:

  Closed
  Enter the date the case was closed or, if the file is being transferred to another office, the date of transfer.

- Click Save.

Recording new Paper File Location

- Press F6 to record a new location.
- Complete the following fields:

  Resp Unit
  If this is the main file, enter the key team responsible for the case. If this is **not** the main file, enter the team responsible for this paper file. .

  Norm Loc
  Enter the office where the file is to be held, e.g. Foundry House.

  Opened
  Enter the date the file was received in this new location.

  Main File
  If this is the main file, click in the box, otherwise leave it blank.

- Click Save.