**Case Transfer checklist**

**Complete the follow tasks prior to transferring a Report:**

Complete all recordings and required documentation. Make sure no recordings are left in draft form.

Add any attachments gathered. (Safety Plan, records received, resources given, etc.)

Complete tasks based on what activity has been completed.

Complete the appropriate assessments based on what activity has been taken.  (Risk Assessment, Decisional Capacity, Perpetrator Access, Protective Service, etc.)

Add any involved persons to the grid if they play a significant role.

Confirm eligible adult is out of your area before transferring as situation may change.

Make sure the address and phone number is listed for where the eligible adult is currently located.

Have supervisor review case prior to transferring.