**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.