



# CASE TRANSFER STAFFING FORM

CPI  Cell Phone  Intake #  Case Name

Case Type  # of Children Receiving Services  Removal Date (If Available)

Date Child(ren) Last Seen  EPSDT/Medical Screening or Scheduled Date

**The following Documents and FSN documentation is required prior to scheduling the CTS**

- Shelter Photos in FSN
- CHBA Referral and Acceptance Letter
- EPDST/Medical Screening
- Local Background Checks
- Indian Child Welfare Form
- FFA Completed and Approved by CPIS
- Fingerprint Cards
- Shelter Order (if Applicable)
- HIPPA
- Shelter Petition (if Applicable)
- Unified Home Study/Other Parent Assessment (**Signature Required by Caretaker**)

### CASE SHELL SCREEN

- Participants Tab - *Update Service Roles, Case Type, Family Structure, County and make sure both parents are participants*
- Relationship Tab - *All relationships entered going in both directions*
- Address Tab - *Address of primary investigation*

### PERSON SCREEN

- Basic Tab - *Names, SS#'s, DOB, Gender, Marital Status, Ethnicity, Race*
- Additional Tab - *Link parent(s) to child, link birth certificate (always). Document fingerprints, birth verification, and upload photo (shelters only).*

### NARRATIVE

- CPI Notes Up to Date

### PLACEMENT/SERVICES

- Initial/Subsequent Placement - *Entered by CPI if Non Licensed or Living Arrangement. Licensed entered by Placement Staff*

### REV MAX

- TANF - *Verify eligibility and update if necessary*
- New TANF - *If placement change(s) prior to CTS*

### EDUCATION TAB (include Day Care Providers and Schools if applicable)

- Education Record - *Create if not created*
- Education History Tab - *Create if not created*

CPI Signature  CPIS Signature  Date