



This job aid is designed to help you understand how and when to transfer a case or application in IES.

Table of Contents

Important Information.....	Page 1
ABE Application Transfer.....	Page 1
Case/Application Transfer.....	Page 5
Verify the Transfer.....	Page 7
FAQ.....	Page 8



Case Transfer – Important Information

- Transfers can occur during three distinct instances in IES:
 - ABE applications before they are registered.
 - Registered ABE applications before they become a case.
 - Cases before certification.
- The process of transferring both registered ABE applications and cases before certification is exactly the same.
- There are two rules to follow when transferring an application:
 1. The status of the application in IES must be *Application Complete* for all paper applications.
 2. ABE applications can be transferred while the application has the status of *Application Pending* and can be transferred from the EDM Inbox.
- There are a two rules to follow when transferring a case:
 1. You can transfer any case with any program before preliminary EDGs are created.
 2. You can only transfer medical only cases after the preliminary EDG is created.



Tip: An EDG is created during Data Collection after all of the Individual Information has been collected about all people on the case.

- Case transfers occur in real-time in IES. As soon as the case is transferred online, the receiving office will be able to access and modify the case. The sending office will no longer be able to modify the case information.
- IES automatically assigns the application/case in the receiving office to a Virtual Worker. IES routes the task to the appropriate queue in the EDM Inbox.
- Tasks associated with the transferred case are automatically assigned to the receiving office and to the appropriate queue. The tasks are end-dated in the transferring office office.
- The receiving office is notified of the transferred case via a Task/Reminder.
- IES does not automatically transfer associated cases (cases with matching addresses). On the case transfer screen, all companion cases will be listed. The worker can manually select the associated cases to be transferred along with the original case.

ABE Application Transfer - Process Steps:

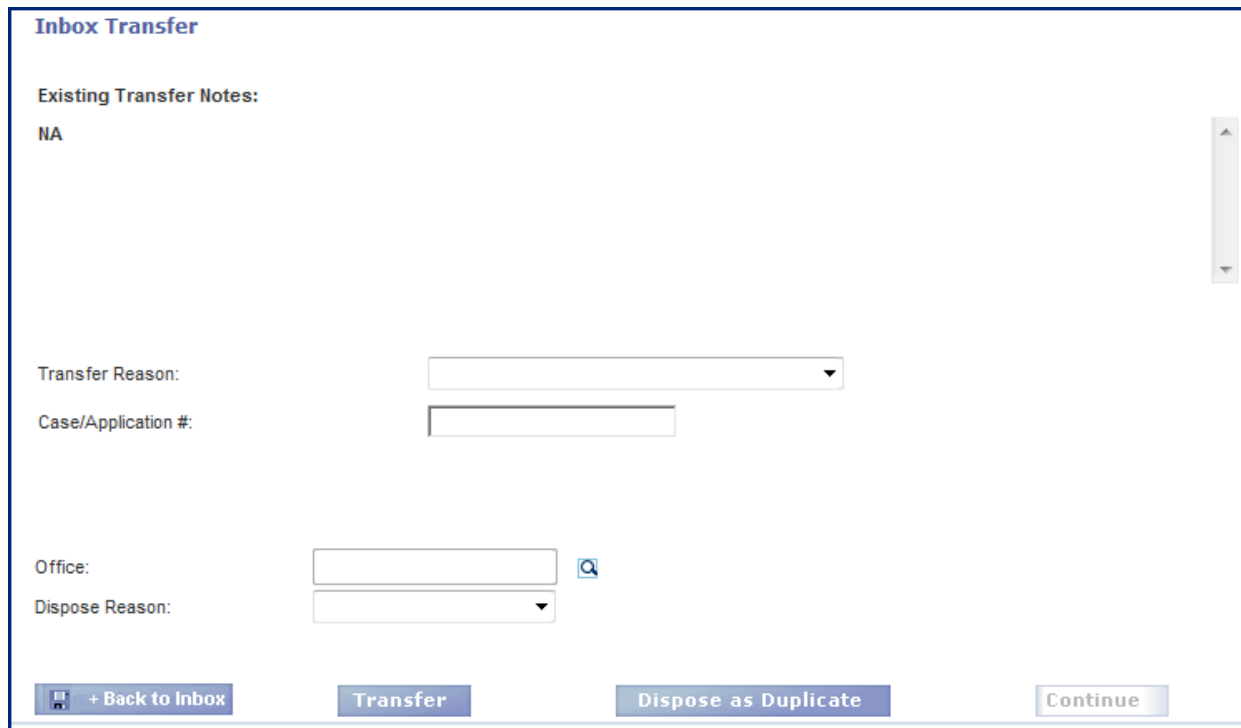
When processing ABE applications, first review the PDF and ensure the case should be in your office. The PDF can be found on the **ABE Application Details** page under the **ABE Documents** section. If you determine the application needs to be transferred before application registration, complete the following steps:




Tip: Any user with access to the EDM inbox has the ability to transfer ABE applications before the Application Registration process has begun. Consult your Manager or IES Expert before transferring ABE applications in IES.

1. On **Left Navigation**, select **EDM**, then select **Inbox**. The **Electronic Document Inbox** page displays.

2. Select the *Screen New Application* queue from the drop down.
3. Click **[Search]**.
4. Select the application in question from the search results and click **Start**.
5. The **ABE Application Details** page displays.
6. Scroll to the **ABE Documents** section and click the *ABE Application* PDF. If you determine that the application should be transferred to a different office, complete steps 7 – 14.
7. On the **ABE Application Details** page, scroll to the **Inbox Transfer** section at the bottom of the page.



8. Select the appropriate transfer reason from the drop down menu.
9. Click the **Search**  icon to select the office receiving the application.
10. The Office Profile search window displays. Enter the search criteria, click **[Search]**. The Search results will display at the bottom of the page. Select the radio button next to the office you would like to send the application to.
11. Click **[Submit]**.
12. The office name will appear in the **Office** field.
13. Enter the ABE Application number in the **Case/Application #** field.
14. Click **[Transfer]**.
15. A message will appear at the top of the page stating that the application has been transferred successfully.

 The application T11017816 successfully transferred from LaSalle County FCRC to South Loop FCRC:

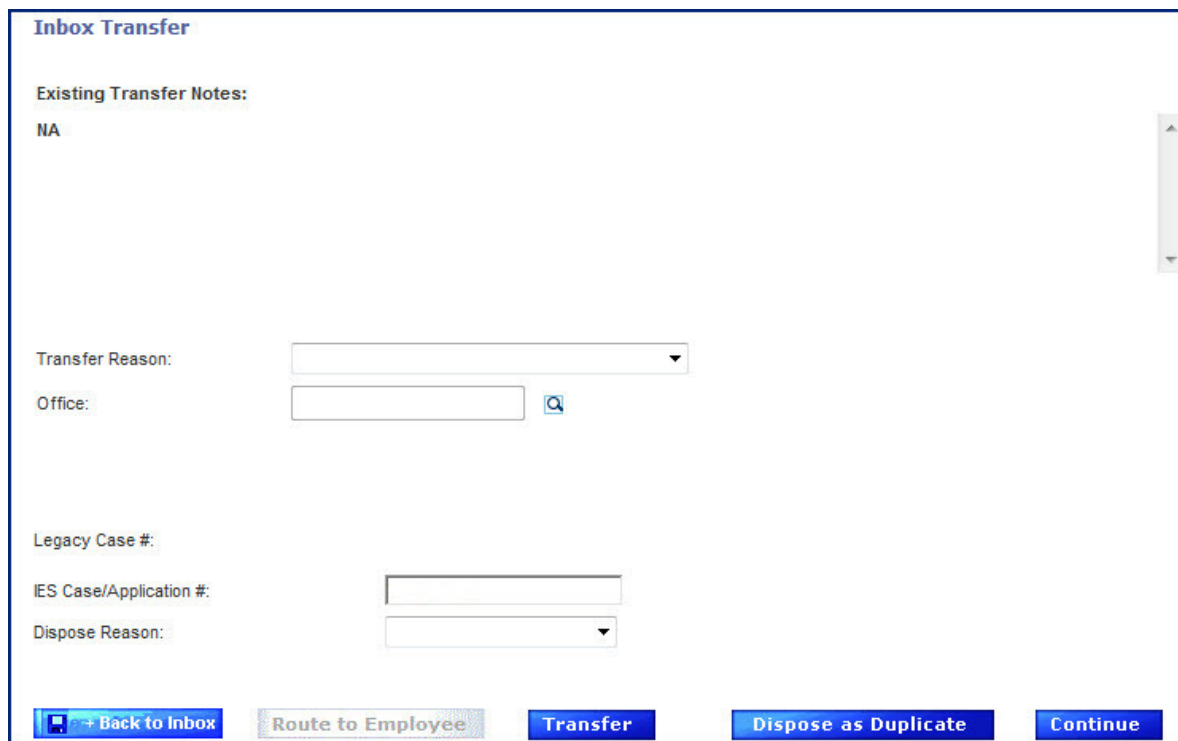



This process is only available for ABE applications prior to completing file clearance in Application Registration. Once the application has the status of *Application Complete*, you will have to transfer the application from the **Manage Office Resources** section in IES.

ABE Application Transfer (from a different office) - Process Steps:

Managers can pull or transfer ABE applications from another office. If you determine the application needs to be transferred before application registration, complete the following steps:

1. On **Left Navigation**, select **EDM**, then select **Inbox**. The **Electronic Document Inbox** page displays.
2. Select the *Screen New Application* queue from the drop down.
3. Select the **Show Documents Started by Others** checkbox.
4. Select the **Show Documents in all Offices** checkbox.
5. Click **[Search]**.
6. Click the **ABE Application** hyperlink.
7. The **ABE Application Details** page displays.
8. On the **ABE Application Details** page, scroll to the **Inbox Transfer** section at the bottom of the page.



16. Select the appropriate transfer reason from the drop down menu.
17. Click the **Search**  icon to select the office receiving the application.
18. The Office Profile search window displays. Enter the search criteria, click **[Search]**. The Search results will display at the bottom of the page. Select the radio button next to the office you would like to send the application to.
19. Click **[Submit]**.
20. The office name will appear in the **Office** field.
21. Enter the ABE Application number in the **Case/Application #** field.
22. Click **[Transfer]**.
23. A message will appear at the top of the page stating that the application has been transferred successfully.



The application T11017816 successfully transferred from LaSalle County FCRC to South Loop FCRC:



This process is only available for ABE applications prior to completing file clearance in Application Registration. Once the application has the status of *Application Complete*, you will have to transfer the application from the **Manage Office Resources** section in IES.

Case/Application Transfer - Process Steps:

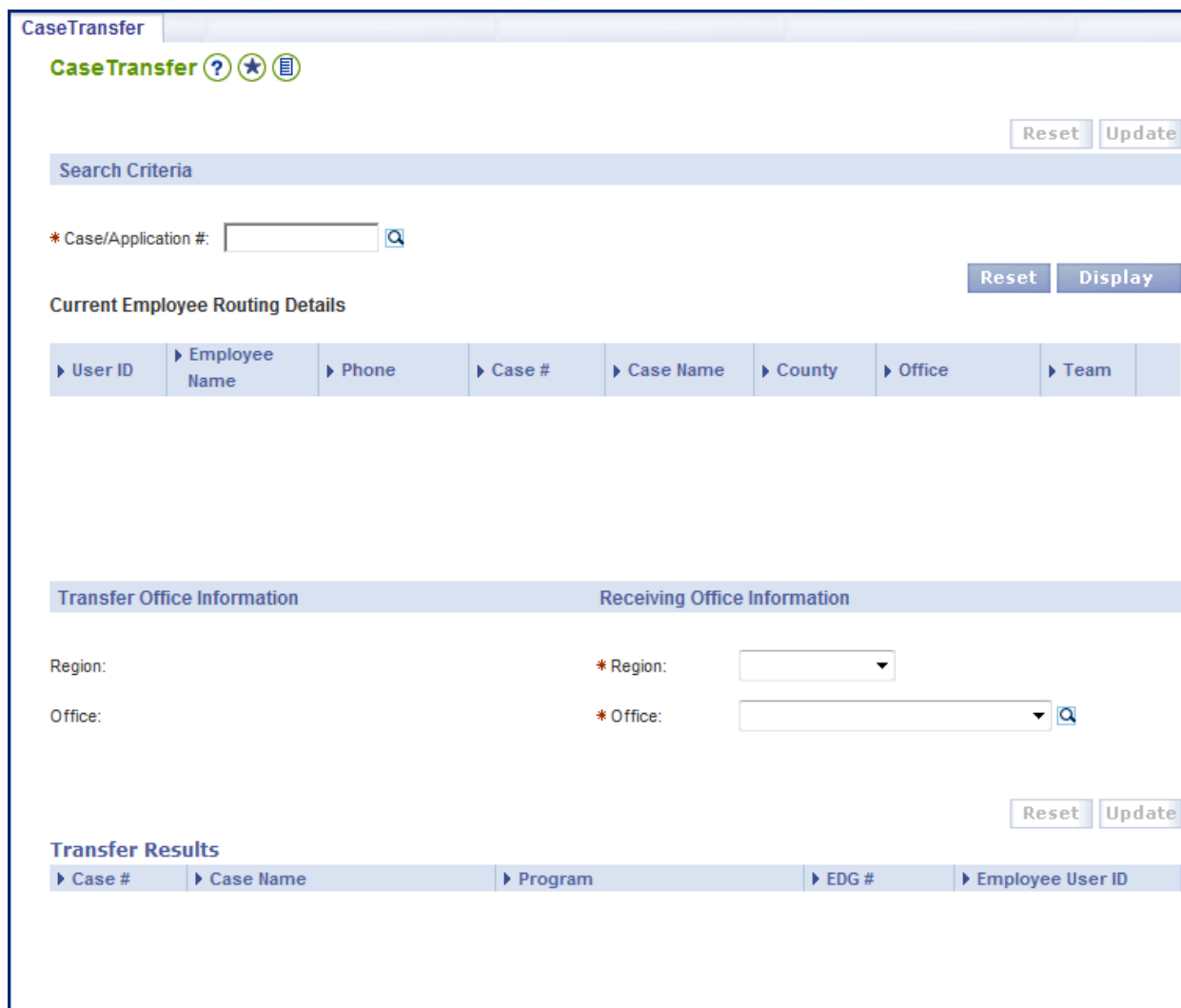
Use this process to transfer applications that have been registered and have a status of *Application Complete* or for pending cases. You currently cannot transfer approved cases in IES.



Intake appointments are required for applications/cases with SNAP and Cash program requests. If the Intake appointment is scheduled, workers must manually cancel the interview by searching for the scheduled interview and changing the appointment status on the **View And Maintain Scheduled Appointments** page to *Cancel* prior to transferring the application/case.

On the **Application Comments** or **Case Comments** page, inform the receiving office a new appointment needs to be scheduled and an updated Form 267 mailed to the customer.

1. **On Left Navigation**, select **Manage Office Resources**, then select **Case Transfer**. The **Case Transfer** page displays.



The screenshot shows the 'CaseTransfer' page with the following sections:

- CaseTransfer** header with icons for help, star, and list.
- Search Criteria** section with a 'Reset' and 'Update' button.
- A search field for '* Case/Application #' with a magnifying glass icon.
- Current Employee Routing Details** section with a 'Reset' and 'Display' button.
- A table with columns: User ID, Employee Name, Phone, Case #, Case Name, County, Office, and Team.
- Transfer Office Information** and **Receiving Office Information** sections.
- Fields for 'Region:' and 'Office:' in both sections, with dropdown menus and magnifying glass icons.
- Transfer Results** section with a 'Reset' and 'Update' button.
- A table with columns: Case #, Case Name, Program, EDG #, and Employee User ID.

1. Enter the **Case #** or **Application #** for the case or application you want to transfer.
2. Click **[Display]**.



- Notice that the **Case Name** populates after you enter a Case #. Confirm that this is the correct name before proceeding with the transfer.

If you do not know the Case Number, you can click the **Search** icon next to the **Case #** field to look it up using the customer's name.

- Notice that the corresponding region and office appear in the **Transfer Office Information** section of the page.

3. Complete the **Receiving Office** section of the page.



Tip: The **Office** field is populated based on the **Region** you select. If you know the region of the Receiving Office, you can select the region and office. Otherwise, you can use the **Search** icon to locate the Receiving Office.

If you are transferring into your office, the **Receiving Office** section of the page auto-populates with your region and office name.

4. You are now ready to complete the case transfer. Click **[Update]**.

CaseTransfer

Case Transfer ? ★

Reset Update

Search Criteria

* Case/Application #: 410020064

Reset Display

Current Employee Routing Details

User ID	Employee Name	Phone	Case #	Case Name	County	Office	Team	
ies.train024	IES Train024	5555555578	410020064	George Dunne	La Salle	LaSalle County FCRC	100580	<input checked="" type="checkbox"/>

Transfer Office Information

Receiving Office Information

Region: Region 01N

* Region: Region 03 ▼

Office: IES Train 1

* Office: LaSalle County FCRC

Reset Update

5. The **Transfer Results** section of the page populates with the office's information, and an *Update Successful* message displays at the top of the page.



Tip: Follow the current business process to notify the receiving office of the case transfer. Email a Manager in the Receiving office notifying them of the case transfer and the need to schedule an intake appointment if applicable.

Transfer Results

▶ Case #	▶ Case Name	▶ Program	▶ EDG #	▶ Employee User ID
410020064	Dunne , George	SNAP, Medical Assistance	0	uat.test021

Verify the Transfer:

To ensure the case transferred correctly to the receiving offices Virtual Worker, complete the following steps to view the case ownership history page.

1. On the **Left Navigation**, select **Inquiry**, then select **Case Ownership History**. The **Case Ownership History** page displays.
2. Enter the **Case #** of the transferred case.



Tip: You cannot search for the case number from this page. You must know the case number before searching for case ownership history.

3. Click **[Search]**.
4. The case ownership history will appear at the bottom of the page.

Case Ownership History

Case Ownership History ? ★

Case/App Search

Case #:

410020064

Reset

Search

Case Information

Case #:

410020064

Case Name:

Dunne, George 30M

Reset

Search

Case Ownership History

▶Employee Name	▶Employee User ID	▶Employee Phone Number	▶Employee Primary Office	▶Ownership Begin Date and Time	▶Ownership End Date and Time
Train024,IES	ies.train024	5555555578	IES Train 1	12/06/2013 01:06:46	12/09/2013 11:22:07
Test021,UAT	uat.test021	5555555575	Winnebago County FCRC	12/09/2013 11:22:08	

To ensure the application transferred correctly, view the Application Summary.

1. On **Left Navigation**, select **Inquiry**, then select **Application Summary**. The **Application Summary** page displays.
2. Enter the **Application #** for the transferred application, click **[Search]**.
3. The application details will display at the bottom of the page. Ensure the office displays as the new office.


Application Assignment Details

Employee User ID	Employee Name	County	Office	Team	Phone	Case #
uat.test061	UAT Test061	Cook	Uptown FCRC	100478	5555555555	

To ensure the ABE application transferred correctly, view your EDM inbox.

1. On **Left Navigation**, select **EDM**, then select **Inbox**. The **Electronic Document Inbox** page displays.
2. Select the *Screen New Application* queue from the drop down.
3. Click **[Search]**.
4. Review the results and ensure the ABE application is no longer in your **EDM Inbox**.

Case Transfer - Frequently Asked Questions

	<p>Q. Can I transfer approved cases?</p> <p>A. No, in Phase 1, you cannot transfer a case once it has been certified.</p>
	<p>Q. Who can transfer a case?</p> <p>A. All workers can transfer a case in IES.</p>
	<p>Q. Are all case transfers processed immediately?</p> <p>A. Single case transfers are always processed immediately. However, managers have the ability to transfer multiple cases between offices at once (for example, entire caseloads). If multiple cases are being transferred from one office to the next, they will be processed during the next nightly batch process.</p>
	<p>Q. What will a Task/Reminder say when I have received a transferred case?</p> <p>A. The Task/Reminder will say – “An Application/Case transferred from another Region/Office has been assigned to you”.</p> <p>The Task/Reminder text is a hyperlink – it will direct you to the Case Ownership History page so you can identify the worker who previously owned the case, if you need to contact them for information. You will be able to manually dispose this Task/Reminder or the Task/Reminder is automatically disposed of when Data Collection is initiated in the receiving office (select <i>Intake</i> or <i>Continue previously selected action</i>).</p>
	<p>Helpful Wizards:</p> <ul style="list-style-type: none"> • Transfer a Case

