

Transfer/Step Down Checklist

This is a guide to facilitate SMART transfers between teams, any outstanding tasks or work from the sending team should be identified and timescales agreed for completion – it should not hold up transfer unnecessarily. If there are any difficulties that cannot be resolved between team managers it must be escalated to Service Managers/Head of Service immediately.

Framework ID: _____

Child/Young Persons' Name: _____

Childs Status
(CP,CLA,CIN, , PF,CWD)

PR recorded for both
parents/carers

Social Worker: _____

Receiving Team Manager: _____

Transferring Team: _____

Receiving Social Worker: _____

Name of Team Manager: _____

Date of Transfer: _____

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
All children and young people						
Child/Young Person (and parents/carers where relevant) have been seen in last 4 weeks and spoken to/written to before transfer						
Chronology updated within previous 4 weeks						
Demographic and key data updated including contact details – see appendix						
Up to date Child's Journey episode and Legal Status						
Warning note/s are current (if no longer relevant should be deleted)						

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
Are case recordings up to date						
Are visits recorded in episodes						
Are TAC Review Meetings recorded in episodes						
Is there a recent C&F or Updated Assessment						
Is there clear analysis in the Assessment that can inform the plan of work and is endorsed by manager						
Joint visit to child/ren or YP by allocated and receiving SW						
Up to date Missing from Home or Care – Risk Assessment and Plan(where relevant)						
Risk Assessments (where relevant)						
Has referral for FGC been completed (where relevant)						
Have consent and written agreement been signed and dated by the appropriate parties?						
Contact arrangements are up to date from Wandsworth Contact Service and details are clear ie higher risk cases, out of borough arrangements						
Finance is up to date and authorised. Financial agreements are on file.						
Day Care/Transport, that needs to be maintained has an up to date breakdown of costs, frequency, supplier details, times and						

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
dates						
CARE Panel Agreement (where relevant)						
TAC review meeting held as part of transfer or Step Down where relevant						
All professional and relevant family members have been notified of transfer or Step Down in writing						
Step down reason and letter are on record when relevant, and Lead Professional recorded						
At Step Down all relevant episodes are completed so that closure episode can be actioned						
Child with CP Plan						
Is there a record of Strategy discussion? Is this signed off by Manager						
Appropriate inter-agency checks completed and recorded in the s47 episode						
Is there a record of sec 47 enquiries completed by social worker? Is this signed off by Manager						
Child seen alone as part of investigation						
Is there an Outcome of Strategy discussion and s47 enquiry? Is this signed off by manager						
Is there a current SMART Plan in place to						

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
keep the child safe?						
Following an ICPC has the first TAC Review Meeting taken place within 10 working days? Is this recorded in the episode and does it evidence a review of the plan						
Is there recorded evidence (in episodes) of TAC Review meetings taking place at least every 6 weeks						
Date of next TAC Review Meeting and/or RCPC						
Looked After Child						
Up to date Legal Status and Placement History including holiday placements, respite						
Has the assessment been updated for the most recent LAC review						
Are the visits to the child/young person recorded in episodes						
Are the Review decisions & minutes of the most recent review on the child/YP's FWI record						
Has the most recent review happened						
Is the date of the next Review meeting recorded						
Is the Out of Borough information available where appropriate						
Is there an up to date Placement Plan? Is this fully completed						

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
Child's Journey – updated?						
Is there an up to date and detailed Care Plan? (This will be included in Updated Assessment and Final Care Plan if in proceedings)						
LAC Key Documents: Passport; National Insurance No (where relevant); Birth Certificate; Savings; Red File; Delegated Authority (in Placement Plan)/up to date photograph						
Child's Permanence Record on record?						
Life Story work started?						
Later in Life Letter to child on record? Is this up to date?						
Are up to date health assessments and dental checks recorded?						
Up to date DUST (where relevant)?						
Up to date SDQ (where relevant)?						
Is there an up to date PEP?						
Is there an up to date PHP?						
Joint Pathway Planning Meeting with Leaving Care Service and YP Pathway Plan completed (with YP where possible) and recorded on FWi (where relevant)						
Pathway Plan for children previously LAC and subject to SGO at age 15½ years old						

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
Court Proceedings						
Is there a record of Legal Planning Meeting and decisions signed off by Service Manager/HoS?						
Have Legal Service provided Advice Note – name of Solicitor?						
Has Pre-Proceedings Meeting been held? Is there a record of meeting/agreement on FW?						
Have Legal Services been informed of case transfer including name of TM and SW?						
Have all relevant court statements been recorded on FWi (in episodes) and agreed by Team Manager and Social Worker? (including any previous proceedings)						
Is there a Care Plan on file? (This is embedded in Initial Statement – Fwi episode). Final Care Plans must be uploaded						
Are the dates of the first/next hearing and next directions appointment recorded in the Child's Journey?						
Are Court Directions provided by Legal Services and uploaded on FWi?						
Are Court Orders provided by Legal Services and uploaded on FWi?						
Are Court directed assessments uploaded to FWi?						

Document	Completed?			Action required	Responsible	Timescale
	yes	no	n/a			
Is there a Placement at Home agreement where relevant?/Risk assessment?						
Is there a Connected Persons Assessment for being placed with relatives/friends? Name of Assessor, Court Assessment completed and on FWi?						
Medical consent for potential carers on record?						
DBS check up to date (including date)?						
Has referral been made to Post Permanence Support Team for Support Plan to be completed? – If completed, is this on child and adults record?						
Has the child/young person been presented to the Fostering and Permanency Panel for long term care plan?						
Have appropriate referrals been made for parallel planning (i.e. Family Group Conference, Adoption/Connected Persons/Long Term Fostering)						
Financial decisions uploaded?						

DEMOGRAPHICS AND OTHER KEY INFORMATION CHECKLIST – to be completed by Business Support

For each allocated child/sibling (to be uploaded to individual record/s) FWi, with the reason for any missing data recorded. It is mandatory that this checklist is completed and information updated.

This must also be reviewed at new allocation; prior to transfer to another team or service; prior to closure; Six monthly update in long term teams

Frameworki Check and Update	Initials	Date checked and updated on FWi	Missing Demographic Data Reason
DOB or EDD (Expected Delivery Date) or Not Born			
Gender			
UPN and correct school			
National Insurance Number			
Legal Status			
Ethnicity (Main and Sub)			
First Language			
Fluency in English			
Religion			
Nationality			
Country of Birth			
Full Address, including Post Code			
Ward and Local Authority			
*Personal Relationship – links completed (inc Parental Responsibility, ticked if applicable)			
Organisational Relationships eg School; Probation			
Worker Relationships entered eg all records must have GP, and where relevant the HV			
Marital Status (for Carer/Parent or other senior household member)			
File Location (on FWi) update as needed			
Restricted records are un-restricted when relevant, as authorised			
The TM has entered up to date Service User Groups (ie the primary and secondary need code)			
*All siblings/family members/household members (including full father's details) need to be recorded and correctly linked on Frameworki. Please use the <u>Frameworki genogram</u> , as this alerts you to any wrongly entered or missing family/household information. For example, the child has two fathers when one should be step father. The record needs to be updated when there is a new birth or there are any other changes to family or household members details/status eg marriage/divorce/death			