Appendix 1: Checklist for managers and workers when a transfer to a new worker or team is necessary or unavoidable.

* The transfer of responsibility should be discussed and agreed between the relevant team managers and an agreed handover date should be identified.
* The responsible manager must review the child’s LCS records and ensure that recordings are up to date in line with the Practice Standards (see checklist below).
  + Chronology must be up to date.
  + Case notes must be complete, up to date and finalised.
  + Up to date assessment should be recorded and finalised.
  + Record of case management decisions and supervisions.
  + Agreed relevant outstanding tasks in ICS work tray.
  + Accurate demographic information.
  + Signposting of relevant documents (including court statements).
  + Notification of the next review meeting.
  + Case summary reviewed and updated.
  + Agreement for funding for any expert assessments/interventions detailed in the care plan should be agreed prior to transfer.
* The new team manager must identify the new social worker and alert them to the planned handover date.
* The transfer record on LCS should be initiated by the current social worker or team manager and completed in full. This document sets out confirmation of compliance audit.
* The new team manager should record management oversight on the child’s record confirming the new social worker details, a brief synopsis of the care planning and the next steps to support the child and their family
* A handover discussion must take place between the transferring and newly allocated social worker and/or team manager and identification of the most suitable handover point in line with the child’s best interests should be identified (transition points may include review meetings and visits).
* Supervision should take place monthly between the social worker and their manager; when children transfer to a new social worker and/or team; the supervision should be planned to ensure it does not exceed the timescale as set out in the practice standards.
* The child and their parents or carers should be informed of any change at the earliest opportunity and given clear contact details from the outset.
* All professionals should be informed of the new social worker and/or team details.
* Unless there are exceptional circumstances which prevent doing so a joint visit should be undertaken to introduce the new social worker to the child and their family.
* The transferring social worker and team manager should ensure that all important information is recorded and any documents for the child and transferred accordingly with the child.
* The transferring social worker should write a brief letter to the child and their family stating their goodbyes and reflecting on the child’s journey they have shared.
* Upon transfer completion the newly allocated social worker is responsible for familiarising themselves with the child’s records and progressing the child’s plan without delay.