

Transferring Ownership of a Client's Application.

The success of a client's progress on a pathway through the supported services on the Housing Support Register depends on continued ownership of the client's case management.

The ownership of a client's application ie information, needs and assessments, starts with the person who made the original application. Subsequently, at various stages on a client's pathway, there is a need to transfer the ownership to new support workers as a client moves through supported services. Clients may also lose contact with HSR agencies and will need re-assessing if they re-appear.

The principle is that when a client moves to a new accommodation based service the new key worker responsible for the client's support plan, will require ownership of the application in order to update key information, including support needs and risk information. This will ensure that the client is correctly re-assessed on the HSR and ready to move on when the time is right.

How to transfer ownership.

There are two methods by which a client's application can be transferred from one user to another on the HSR :

- 1) By the existing 'owner' of the application ie the person currently named as the assessor, transferring the ownership to the new assessor. This is the preferred method and HSR users should use this method whenever able, or
- 2) By applying to the Single Point of Access team. This will be necessary where the existing 'owner' is not available to carry out method 1.

1. Transferring from the existing owner.

This is a very simple process and requires the person wishing to take over the ownership to email the existing 'owner' (currently named as the assessor) a request to carry out the transfer.

This request must include :

- a) Confirmation of the client's name and date of birth,
- b) The name and organisation of the person making the request,
- c) Confirmation of the person's involvement in the client's continuing support and that they are authorised users of the HSR.
- d) Confirmation that the client concerned has consented to the sharing of information through the HSR.










Provided the Existing 'owner' is happy to release their ownership role and are assured the transfer is appropriate they may transfer their role as follows :

Ownership Transfer Process

Enter HSR and open the named clients details (first page).

- On Agency Name field – open the dropdown and select and confirm the new organisation taking over ownership, **and press Save**.
- On Assessor field – open the dropdown and select the name of the person requesting the transfer. Press save to confirm transfer.

Client: Test Jo Test Watson 

General	Checks	Diversity	Contacts	Addresses	Forms	Files	Assessments	Matches	Events	Tasks	Support Plans
Surname*	Test Watson										Id 193997
Forename(s)*	Test Jo										
Sex*	<input type="radio"/> Male <input checked="" type="radio"/> Female										
DOB*	12/12/1988 										(Age 21)
Marital Status	-----Select-----										
N.I. Number											
ANITE Reference											
Mobile Number	075452188										
Email Address											
Registration Date*	24/04/2009 										
Agency Name	B.C.C. 										
Primary Needs *	Young person leaving care (age 16-17) 										
Secondary Needs *	Teenage parent/pregnant (age 16-19) 										
Housing Status*	B&B 										
Housing Status Date*	24/04/2009 										
Assessor*	steph.croker 										
Next Assessment Date*	20/08/2010 										
<div style="text-align: right;">Save Close</div>											

Note : If the new organisation name or the new assessor name do not appear in the dropdown details please refer the request to the SPA team.

Scenarios where this type of Ownership transfer may occur are :

- When a client is moving on from one service to another,
- A client has had a spell 'out of contact' eg prison, with an HSR agency, and a new agency needs to pick up and review/update the application.

2. Applying to the SPA Team to request a transfer.

Where it is not possible to transfer ownership via the above method, a HSR user may make a request to SPA to carry out the transfer.

To do this the person requesting the change should complete the attached form and send to the SPA team at email address –

accommodation.services@bristol.gov.uk with a heading to the email stating '**ownership transfer request**' in bold letters.

The form is attached :

To: SINGLE POINT OF ACCESS TEAM, Housing Solutions.

Request for the Transfer of Ownership of a HSR Application

a) Details of the person requesting the transfer :

DECLARATION : In making this request I can confirm that the client concerned has consented to the sharing of any information under the HSR protocols.

Name:	
Job Title:	
Organisation:	
Telephone contact details:	

b) Details of the Application / Client

Name:	
Current Address:	
Current 'owner' of the application:	

c) Reasons why the person completing this form requires ownership of the application :

d) Reasons why the existing owner is unable to transfer the application :