Transfer, Exit, and Close

This guide covers how to transfer a child to another provider agency, exit, and close a child's record from Early intervention.

Disclaimer: This training aims to enhance the knowledge, skills, and proficiency in using ACORN as it relates to Early Support Services and should not substitute required programmatic training. The information presented in this content reflects the system build at the time of training.

Washington State Department of
CHILDREN, YOUTH & FAMILIES

Transferring a Child
Send a Transfer

How To

Transfer a Child's record from current to future ESIT Provider Agency (PA)

Note

- Please perform a Child Lookup to ensure the correct child is transferred, exited, or closed.

- Fields with asterisks (*) are required fields

- All completed transfer requests appear in the Child Transfer grid

- Users from both the sending and receiving ESIT Provider Agencies should refrain from editing the child's record while the transfer is pending.

- If the sending ESIT PA needs to make an update or provide services to the child, they must cancel the Transfer, make the change, and re-initiate the transfer.

- A child transfer should be initiated on the effective date of the transfer. Although the system allows the transfer notification date to be entered ahead of time; **users should not enter transfers ahead of time**

Step / Action

1. To initiate the transfer of a Child's record, search for the Child. using the **Child Lookup** functionality*. Proceed to select and open/edit the Child's record.
2. From the Child's opened record, select the **Transfer** tab.
3. Select the **Child Transfer Report** panel.
4. Select **Add Child Transfer** button. The **Child Transfer** pane populates (viewable on the next slide).

The Child Transfer grid

Transferring a Child
Send a Transfer

How To

Transfer a Child's record from current to future ESIT Provider Agency (PA)

Note

- A Child may have multiple transfers (from Provider Agency to Provider Agency).

- A Child remains the current Provider Agency's responsibility until the Child is accepted by receiving provider agency.

- Upon submitting the transfer request, the receiving Provider Agency receives a "Transfer request" alert on their **Transfer** dashboard. If accepted, *most* activity related to the sending Provider Agency will cease (IFSPs service authorizations, etc.), however, billing/claiming activity remains active. If rejected, the request routes back to the Provider Agency that initiated the request and is marked as a "Transfer Rejected" on the sender's **Transfer** Dashboard.

Step / Action

1. Select **To Send** from the **Transfer Request** drop-down.
2. Select the **Transfer Date** (today's date) from the **Transfer Date** drop-down.
3. Select the Checkbox to indicate the Parent has been notified.
4. Notes can be entered in the **Sender Comments** text field. *(i.e., family notified us that child will be moving to your ESIT Provider Agency (PA) on March 15th).*
5. The **Transfer From County** field prepopulates based on Child's current Provider Agency.
6. Enter the name of the Provider Agency the Child is being transferred to in the **Transfer To County** type ahead field**.**
7. The **Transfer Initiated By** field prepopulates with the user's name.
8. Select the **Submit** button.

The Child Transfer Pane

Transferring a Child
Requesting a Transfer

🔍 How To

Request a Child's record be transferred to your ESIT Provider Agency (PA)

ℹ️ Note

- Only specific user's role can request, approve, and accept Child transfers from other Provider Agencies.

- The requesting Provider Agency has limited access to the Child's record for whom the request has been made. The requesting county can only view the **Child Transfer** tab of the Child's record.

Step / Action

1. Select **To Receive** from the **Transfer Request** drop-down.
2. Select the Transfer Date (today's date) from the **Transfer Date** field.
3. Select the Checkbox to indicate the Parent has been notified that ESIT Provider Agency information has been shared.
4. Enter notes into the **Sender Comments** text field *(i.e., family notified us that the child has relocated to our county on March 14th).*
5. The **Transfer From County** field prepopulates based on child's current Provider Agency. Select the appropriate county from the **Transfer To County** type ahead field.
6. The **Transfer Initiated By** field prepopulates with the username.
7. Select the **Submit** button.

Transferring a Child
Accepting or Declining a Transfer

How To

Accept or decline a transfer as a receiving ESIT Provider Agency (PA)

Note

- A Child remains the current Provider Agency's responsibility until the Child is accepted by receiving Provider Agency.

- If accepted, most activity related to the sending Provider Agency will cease (IFSPs service authorizations, etc.), however, billing/claiming activity remains active.

- If rejected, the request routes back to the Provider Agency who initiated the request and is marked as a "Transfer Rejected" on the sender's **Transfer** Dashboard. The Child's case remains active in the original Provider Agency, along with the IFSP and Service Authorizations.

Step / Action

1. The receiving county selects **Accept** or **Decline** from the **Transfer Accepted/Declined** drop-down.
2. The date prepopulates within the **Transfer Date** field.
3. Add **Comments**, if applicable, within the **Receiver Comments** field.
4. The **Transfer Accepted/Declined By** field prepopulates with the current user's name.
5. Select the appropriate county from the **Transfer Accepted County** type ahead field**.**
6. Select the **Submit** button.

Child Transfer

Child Transfer

*Transfer Request
To Send

*Transfer Date
09/12/2023

☑ *Parent has been notified that early intervention information has been shared with new location
Sender Comments

*Transfer From County
Adams   ✓

*Transfer To County
Clark   ✓

Transfer Initiated By
Auto Super

--- Select ---
Accepted
Declined

Accepted/Declined Section

Transfer Accepted/Declined
--- Select ---

Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

Transfer Accepted County

Submit

Closing and Reopening a Child's Record

Transfer, Exit, and Close

Child Exit/Close
Exit/Close

How To

Exit/Close a Child's Record

Note

- All completed requests display in the **Child Exit** grid.
- When a child is exited from a program, the Child's record is locked from editing; however, the Child's record may be reopened by designated user roles for modification and re-closed.
- The Child Exit area is used for federal reporting purposes.

Step / Action
1. Select the **Exit/Reopen** tab.
2. Select the **Child Exit** panel.
3. Select the **Add Child Exit** button.

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer | Exit/Reopen | Document |

Child Exit
Reopen/Reactivate Child

⊞ Child Exit

Exit/Close ▾ ⚙ ⤡ ▬

Add Child Exit

Excel

🔍 Search...

Rows per page 10 ▾

Exit Date ▲	Exit Reason	Date of Death	Closure Amendment	Completed By	Action
No data available in table					

Showing 0 to 0 of 0 entries

Prev Next

Child Exit/Close
Exit/Close

How To

Exit/Close a child

Step / Action

1. Select the **Exit Date** from the **Exit Date** field.
2. Select the appropriate **Exit Reason** from the **Exit Reason** field.
3. Select the Child's **Date of Death**, if applicable.
4. The **Completed By** field automatically prepopulates with the current user's name.
5. Select the **Submit** button.

--- Select ---
Attempts to contact unsuccessful
Child Deceased
Duplicate record for this child
Transitioned under age 3

Child Exit

Child Exit

*Exit Date
09/12/2023

*Exit Reason
Transitioned under age 3

Date of Death

Completed By
Auto - Super

Submit

Child Exit/Close
Reopen/Reactivate Child Record

How To
Reopen/Reactivate a Child's record

Note
- When a child is exited from a program, the Child's record is locked from editing; however, it may be reopened by those with of designated roles to modification and reclose.
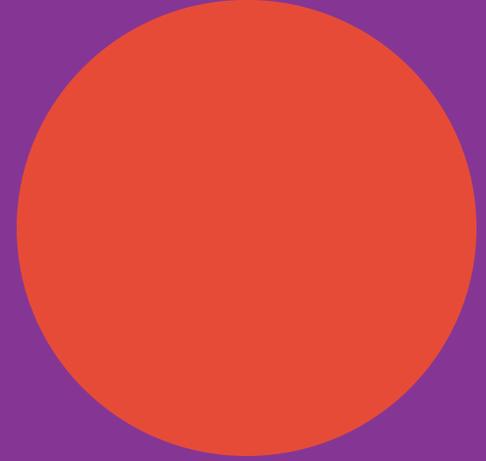
Step / Action
1. Select the **Exit/Reopen** tab.
2. Select the **Reopen/Reactivate Child** panel.
3. Select the **Add Reopen/ Reactivate** button.
4. The username will automatically populate in the **Case Reopened/ Reactivated By** field.
5. Select **Reopened/Reactivation Reason** from the **Reopened/ Reactivation Reason** drop-down.
6. Complete the **If Other, Please Explain** field, if applicable.
7. Complete the **If Modification to Child Record** field, if applicable.
8. Enter the **Reopen/Reactivation** date into the **Reopen/Reactivation Date** field.
9. Enter **Comments** into the **Comment text field,** if applicable
10. Select the **Submit** button.

Thank you!

PUBLIC™
CONSULTING GROUP

Revision History

Version Number	Release Date	Author	Revision Summary
v.1	6.6.2023	Courtney Pittman	First Draft Release
v.1.2	9.12.2023	Courtney Pittman	Second Draft Release