

## 2404

## TRANSFER PROCEDURES

A file is only considered for transfer if the child is a Status 3a (Eligibility Evaluation completed), or a Status 6 or 6a (current IFSP in place). If the child is a Status 1 (Referral) or a Status 2 (Intake completed), the old EI unit will close file and the new location will open the client again in the database as a new referral.

(See status codes under Re-Referral and Re-Open Procedures)

### **Family Notifies SoonerStart That They Are Moving:**

When a family reports that they are moving to a new location in the state, the service coordinator provides the family with the contact information of the SoonerStart office in the new area. If the child is in Status 01 or Status 02 the database record is closed. If permission is obtained from the parent, the service coordinator contacts the new SoonerStart office to make a referral with the family's new address and contact information.

If the child is in Status 3a (Evaluation completed, eligible for services) the child may be transferred in the SoonerStart database. The service coordinator obtains contact information from the family and updates the database with the new information. The service coordinator notifies their Regional Early Intervention Coordinator (REIC) who transfers the child and notifies the receiving REIC at the new SoonerStart site. When the transfer is accepted by the receiving REIC, the ORIGINAL referral date is retained in the database. Although the SoonerStart database may reflect that the IFSP is past the 45 day timeline, it should be documented in the progress notes that the chart was transferred. If properly documented, the chart will be considered in compliance for meeting the 45 day timeline due to exceptional family circumstances.

If the child is in Status 06 or 6a – IFSP in place – the child may be transferred in the SoonerStart database. The service coordinator obtains contact information from the family and updates the database with new information. The service coordinator notifies the REIC who transfers the child on the SoonerStart database and notifies the receiving REIC at the new SoonerStart site by e.mail or telephone. When the transfer is accepted by the receiving REIC, the ORIGINAL referral date is retained in the database.

### ***The current EI unit will mail COPIES of the following to the new EI unit for monitoring and accountability:***

Intake form

Multidisciplinary Evaluation and Child Assessment Team Summary (MECATS)

Individualized Family Service Plan – initial and subsequent

Child Outcomes Summary Form (ECOs)

Provider progress notes for past 12 months only

Service coordinator progress notes for past 12 months only

Any additional chart information determined pertinent for continued services

**Do not include test protocols or medical records.**

### **Family Does Not Notify SoonerStart That They Are Moving**

When a family arrives at a new SoonerStart site and reports that they were receiving services at another SoonerStart site, the service coordinator searches the database for further information regarding the status of the child. If the child was in status 01 or 02, the former site is notified that the child has moved and that the chart should be closed at that site. The service coordinator then opens the child in the new site as a **new referral**. If the child has been closed in the database, see SOONERSTART RE-REFERRAL PROCEDURES.

If a search of the database reveals that the child is in status 3a, the service coordinator notifies the current REIC who notifies the previous REIC that the child should be transferred from that site. When the transfer is accepted by the receiving REIC, the ORIGINAL referral date is retained in the database. Although the SoonerStart database may reflect that the IFSP is past the 45 day timeline, it should be documented in the progress notes that the chart was transferred. If properly documented, the chart will be considered in compliance for meeting the 45 day timeline due to exceptional family circumstances.

If the child is in Status 06 or 6a – IFSP in place – the service coordinator notifies the REIC who notifies the previous REIC that the child should be transferred from that site. When the transfer is accepted by the receiving REIC, the ORIGINAL referral date is retained in the database.

***The current EI unit will mail COPIES of the following to the new EI unit for monitoring and accountability:***

Intake form

Multidisciplinary Evaluation and Child Assessment Team Summary (MECATS)

Individualized Family service Plan – initial and subsequent

Child Outcomes Summary Form (ECOs)

Provider progress notes for past 12 months only

service coordinator progress notes for past 12 months only

Any additional chart information determined pertinent for continued services

**Do not include test protocols or medical records.**

It is the sending REIC's responsibility to verify that all data (include ECOs, if applicable) has been entered into the SoonerStart database before the child is transferred to another site and the receiving REIC's responsibility to verify that the database is current before assigning a service coordinator.

### **Transfer of Records – Out of State**

The service coordinator receives a written release for SoonerStart records from another EI unit in another state.

***Service Coordinator arranges to send COPIES of the following to the out-of-state EI unit:***

Multidisciplinary Evaluation and Child Assessment Team Summary (MECATS)

Individualized Family service Plan – initial and subsequent

Original records remain in the SoonerStart office where the chart was initially opened and are maintained, stored and destroyed according to the procedures noted in *Parent Rights for SoonerStart Services – Notice of Procedural Safeguards.*