

## 2504: TRANSFER PROCEDURES

When a family moves to another SoonerStart site, portions of the paper chart and the electronic record must be transferred to the new site.

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

When a family reports that they are moving to a new location in the state, the Resource Coordinator provides the family with the contact information of the SoonerStart office in the new area. The Resource Coordinator obtains the change of address information from the family and updates EdPlan with the new information on the Referral Page. The Resource Coordinator notifies their Regional Early Intervention Coordinator (REIC) by email that the child needs to be transferred. The email notification should contain:

- a. Child's full name
- b. Child's DOB
- c. Child's local ID
- d. New SoonerStart site

The REIC transferring the record from the original site will:

- a. Verify that EdPlan is up-to-date and all appropriate events created.
- b. Enter the new SoonerStart site location on the child's Personal page, and SAVE.
- c. Enter the name of the designated Resource Coordinator or REIC on the child's Parents/Team page. This person is primarily responsible for coordinating services at this site or may re-assign to another Resource Coordinator. SAVE.
- d. Notify the REIC/RC at the receiving site by email that a child has been transferred to their caseload and site.

The Resource Coordinator or REIC at the original site is responsible for ensuring the COPIES of the following chart documents are mailed to the new EI site for monitoring and accountability (Do not include test protocols or medical records):

- **Provider Progress Notes (last 6 months of services only) – only if determined pertinent for continued services and/or documenting cancellations or no-shows impacting timelines.**
- **Any additional chart information determined pertinent for continued services**

If the child transfers to another SoonerStart site before an eligibility evaluation is completed, the RC from the sending site should cancel the referral before notifying their REIC that the record needs to be transferred. This allows the RC/REIC at the new site to enter in the date he/she receives the referral and the date of contact with the family and begin a new 45-day timeline.

If the child has been determined eligible by the former site team, the ORIGINAL referral date is retained in the database and an initial IFSP is scheduled. Although the record may reflect that the IFSP is past the 45-day timeline, it should be documented in the progress notes or the EdPlan contact log that the

chart was transferred. If properly documented, the chart is considered to be in compliance for meeting the 45-day timeline due to exceptional family circumstances.

If the child has an active IFSP and is currently receiving early intervention services, the new Resource Coordinator should schedule an IFSP meeting with the family and new service provider(s) to review outcomes and service delivery.

It is the sending REIC's responsibility to verify that all data (include ECOs, if applicable) have been entered into EdPlan BEFORE the record is transferred to another site and the receiving REIC's responsibility to verify that EdPlan is current before assigning a new Resource Coordinator.

**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:

1. The new Resource Coordinator or REIC searches EdPlan for further information regarding the status of the child.
2. If the record is currently "active" in EdPlan, the new REIC will notify the former Resource Coordinator/REIC by email that the child needs to be transferred to the new site.
3. The former Resource Coordinator/REIC verifies that EdPlan is up-to-date and that all data has been entered.
4. The former REIC then notifies the new REIC by email that the record is ready to be transferred. The new REIC will update the child's EdPlan record with the new Resource Coordinator's name, the new site and any new demographic information for the child.

If the child has not had an eligibility evaluation completed, the referral is cancelled by the sending site so that a new referral date can be entered along with the new site and new RC's name.

If the child has been determined eligible by the former site team, the ORIGINAL referral date is retained in the database and an initial IFSP is scheduled. Although the record may reflect that the IFSP is past the 45-day timeline, it should be documented in the progress notes or EdPlan contact log that the chart was transferred. If properly documented, the chart is considered to be in compliance for meeting the 45-day timeline due to exceptional family circumstances.

If the child has an active IFSP and is currently receiving early intervention services, the ORIGINAL referral date is retained in the database. The new Resource Coordinator should schedule an IFSP meeting with the family and new service provider to review outcomes and service delivery. If the child is "inactive" in EdPlan, see **Section 2503: SoonerStart Re-Referral and Re-Activation Procedures**.

The former EI unit will mail COPIES of the following to the new EI unit for monitoring and accountability (Do not include test protocols or medical records):

- **Provider Progress Notes (last 6 months of services only) – only if determined pertinent for continued services and/or documenting cancellations or no-shows impacting timelines.**
- **Any additional chart information determined pertinent for continued services**

**Transfer of Records – Out of State:**

The Resource Coordinator receives a written release for SoonerStart records from another EI program in another state. Follow procedures outlined in **Section 2511: Releasing Confidential Information** to send copies of the:

- Multidisciplinary Evaluation and Child Assessment Team Summary (MECATS)
- Individualized Family Service Plan – current

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