



Exit

Transfer, Exit, and Close

This guide covers how to transfer, exit, and close a child's record within
ACORN

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

Definitions

<p>TRANSFER</p>	<p>Transfer a child’s record to a provider agency. A child record may be sent, received, requested, or rejected. Once a transfer has been initiated, the transferring provider agency should no longer modify the child record. The transfer should not be initiated until the provider agency has updated the child’s record.</p> <p>•A transfer request should not be sent until a child has moved, if a transfer is initiated and the family's plans change, the sending provider agency will need to request the child be transferred back to them or that the new county reject the transfer.</p> <p>The Transfer actions are as follows:</p> <ul style="list-style-type: none"> • Incoming Transfer: Provider Agency A requests a transfer of a child to Provider Agency B (push) • Transfer Request: County B requests the transfer of a child from County A (pull), or • Transfer Rejection: In either scenario (1 or 2), the transfer recipient can reject a request. *If a rejection occurs - a new alert will be generated.*
<p>EXIT</p>	<p>Exiting a child does not occur automatically, When a child is exited from Early Support Services, the child's record will be locked from further editing; however, the child's record may be reopened by the agency managers for modification and re-exited. After Exit, the child's record will still be available for service logging and billing (when these features are available).</p> <p>The Child Exit area is used for federal reporting purposes</p>
<p>CLOSE</p>	<p>Closing a child's record automatically occurs at a specified time. When a child's record is closed, the record will be locked from further editing, service logging and billing activities (when available). A child's record can be reopened by agency managers and re-closed.</p>
<p>NOTE</p>	<p>Cases will have Exit status until the automatic process occurs within the system, which will change to 'Closed'. Early Support cases will close when the child is five (5) years of age. You can reopen closed cases with the proper permissions; no service logging activity can occur once the record is closed (when service logging becomes available).</p>



Entering a Request to Send a Child's Record to Another Provider Agency

Transfer, Exit, and Close

Transferring a Child

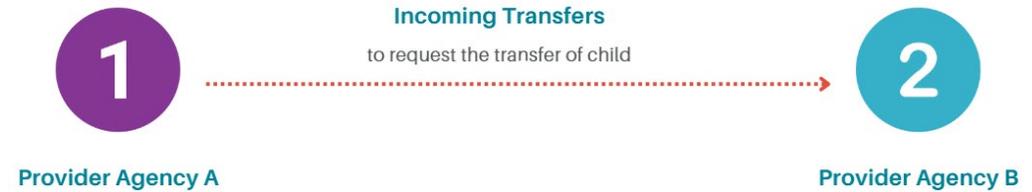
Submitting an Incoming Transfer Request

How To

Enter a transfer request to send a child's record

Note

- An **Incoming Transfer** can be defined as Provider Agency A requesting the transfer of a child's record to Provider Agency B (a push action). This request may occur due to the family of a child assigned to Provider Agency A notifying the agency that the child has relocated to an area serviced primarily by Provider Agency B.
- In this instance, Provider Agency A will reach out to Provider Agency B informing Provider Agency B that a child currently assigned to Provider Agency A's caseload has relocated to Provider Agency B's service area.
- After notifying Provider Agency B of the confirmed relocation, Provider Agency A will follow up by submitting a formal request in ACORN to send this child's record to Provider Agency B. This section covers what the incoming transfer process looks like in ACORN.



Transferring a Child

Submitting an Incoming Transfer Request

How To

Enter a transfer request to send a child's record

Note

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

Step / Action

1. To initiate the transfer of a Child's record, search for the Child. using the **Child Lookup** functionality. Proceed to locate (using the Child Lookup filters) and select the child needing to be transferred.
2. Select the **Edit** button next to the child needing to be transferred.

The screenshot shows a software interface for child lookup. On the left is a sidebar menu with options: Home, Child, Lookup, Add, Reports, Provider, Service Provider, Doctor, Attendance, Billing, Enrollment, Maintenance, Security, and Help (option 1). The 'Child' menu item is selected. The main area is titled 'Lookup' and contains a 'Child Lookup Results' section. This section has a 'Report Filters' area with several dropdown menus: 'Filter For (Equal To)' set to 'All Children', 'EI Child ID (Equal To)', 'County of Residence (Equal To)' set to '- Select Item -', 'Last Name (Equal To)', 'First Name (Equal To)', 'Lookup Begin Date (Equal To)', 'Lookup Thru Date (Equal To)', 'Child Status (Equal To)' set to 'Active', 'Name Lookup (Equal To)' set to 'Name Lookup', and 'Address County (Equal To)' set to '- Select Item -'. A 'Search' button is located at the bottom right of the filters. Below the filters is a table with columns: Last Name, First Name, Birth Date, Phone, Address, City, State, Zip, County, County of Residence, EIOD Name, Family Resources Coordinator, Child Status, and Action. The table contains two rows of data. The first row is for a child named Pearl Gadsden, born 02/04/2022, living at 151 W 34TH ST, Adams, MO. The second row is for a child named Philibert Gadsden, born 04/09/2022, living at 151 W 34TH ST, King, MO. The 'Action' column for each row contains 'Request Transfer' and 'Edit' buttons. A callout '1' points to the 'Lookup' search bar in the sidebar, and a callout '2' points to the 'Edit' button in the table.

Last Name	First Name	Birth Date	Phone	Address	City	State	Zip	County	County of Residence	EIOD Name	Family Resources Coordinator	Child Status	Action
PCG-Gadsden	Pearl	02/04/2022		151 W 34TH ST			10001-2101	Adams	Adams		Mattis, John		Request Transfer Edit
PCG-Gadsden	Philibert	04/09/2022		151 W 34TH ST			10001-2101	King	King		MORENO, AIDA	Active	Request Transfer Edit



Transferring a Child

Submitting an Incoming Transfer Request

How To

Enter a transfer request to send a child's record

Note

- A child may have multiple transfers.
- All completed transfer requests appear in the **Child Transfer** grid.
- If the sending provider agency needs to make an update or provide services to the child, they must cancel the transfer, make the change, and re-initiate the transfer at a later time.

Step / Action

1. Select the **Transfer** tab. The system defaults to the **Child Transfer Report** panel.
2. Select the **Add Child Transfer** button located on the **Child Transfer** grid to add a new transfer.
3. Select the **Edit** button, if you are completing or revising an existing transfer.

The screenshot shows the 'Transfer' tab selected in the top navigation bar. The main content area is titled 'Child Transfer Report' and contains a 'Child Transfer' grid. The grid has a header row with columns: Transfer From Point of Entry, Transfer To Point of Entry, Transfer Initiated By, Transfer Accepted/Declined, Date Accepted/Declined, Transfer Accepted/Declined By, Sender Comments, Receiver Comments, and Action. A row is visible with 'Birth to Three - Pierce County' in the first column and 'Boost Collaborative' in the second. An 'Add Child Transfer' button is located above the grid. An 'Excel' button is in the top right of the grid area. A pagination bar at the bottom shows 'Prev 1 Next'. Three numbered callouts are present: '1' points to the 'Transfer' tab, '2' points to the 'Add Child Transfer' button, and '3' points to the 'Edit' button in the Action column.

Transfer From Point of Entry	Transfer To Point of Entry	Transfer Initiated By	Transfer Accepted/Declined	Date Accepted/Declined	Transfer Accepted/Declined By	Sender Comments	Receiver Comments	Action
Birth to Three - Pierce County	Boost Collaborative							Edit



Transferring a Child

Submitting an Incoming Transfer Request

How To

Enter a transfer request to send a child's record

Note

- "To Send" indicates a provider agency is requesting to send a child's record to another provider agency.
- A child remains the sending provider agency's responsibility until the child is accepted by the receiving provider agency.
- Although the system allows the transfer notification date to be entered ahead of time; End-users are encouraged to initiate child transfers on the effective date of the transfer.

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 of the intended transfer.
4. Notes can be entered in the **Sender Comments** text field (i.e., The family notified us that the child will be moving to your ESIT provider agency on March 15). This is optional.
5. Use the type-ahead to select the **Transfer From Point of Entry/Provider Agency** and the **Transfer To Point of Entry/Provider Agency**.
6. The **Transfer Initiated By** field prepopulates with the name of the user entering the transfer.
7. The **Accepted/Declined** section is reserved for the receiving provider agency only.
8. Select the **Submit** button to save your entry.

The Child Transfer Pane

Child Transfer

Child Transfer

*Transfer Request
To Send

*Transfer Date
10/04/2023

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

Sender Comments
Family notified us that the child will be moving to your ESIT Provider Agency (PA)

*Transfer From Point Of Entry
Bright Start Services

*Transfer To Point Of Entry
Birth To Three Developmental Center

Transfer Initiated By

Accepted/Declined Section
Transfer Accepted/Declined
Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

Submit



Accepting a Request to Receive a Child's Record to your Provider Agency

Transfer, Exit, and Close

Transferring a Child

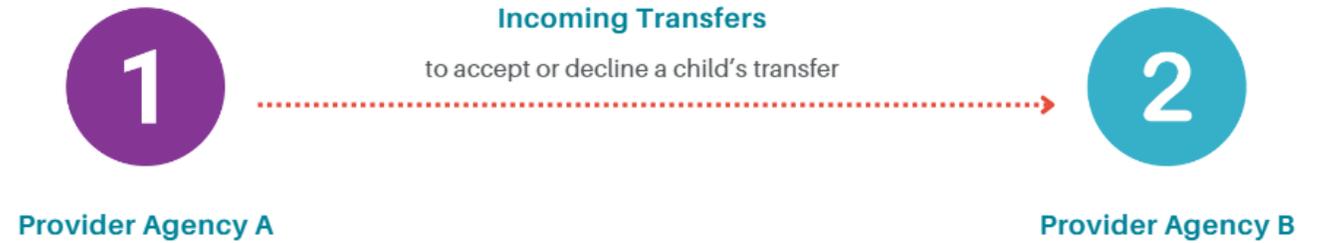
Accepting/Declining a Transfer

How To

Accept or Decline Child's Record

Note

- An **Incoming Transfer** can be defined as Provider Agency A requesting the transfer of a child's record to Provider Agency B (a push action). This request may occur due to the family of a child assigned to Provider Agency A notifying the agency that the child has relocated to an area serviced primarily by Provider Agency B.
- In this instance, Provider Agency A will reach out to Provider Agency B informing Provider Agency B that a child currently assigned to Provider Agency A's caseload has relocated to Provider Agency B's service area.
- After notifying Provider Agency B of the confirmed relocation, Provider Agency A will follow up by submitting a formal request in ACORN to send this child's record to Provider Agency B. This section covers what the incoming transfer process looks like in ACORN.



Transferring a Child

Accepting/Declining a Transfer

How To

Accept or Decline Child's Record

Note

- The child remains the sending provider agency's responsibility until the child is accepted by the receiving provider agency.
- Upon a provider agency submitting a transfer request to send a child's record, the transfer request routes to the **Transfer** Dashboard of the receiving provider agency.
- When a transfer is accepted, the child becomes the responsibility of the accepting provider agency on the transfer date. Hence, it is best practice only to accept the child when ready to accept **and** provide services.
- 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 sending provider agency and is marked as "Transfer Rejected" on the sender's **Transfer** Dashboard.

Home

Children Assigned to Caseload

Children with 3-9 Months before their 3rd Birthday

Timely Services Due Initial Service Has Not Been Delivered

Children with an Agency Missing a Practitioner

Children with an IFSP with Services Missing an Agency

Transfer Alerts

Referrals

Evaluations

Missing Child Outcome Survey

IFSP Alerts

Timely Services

Transitions

Children Needing Family Resources Coordinator

Child Case Close Alerts

Death of Child Alert

Transfer Alerts

-Default Report-

Report Filters

*Dashboard Alert (Equal To)

Incoming Transfer

- Select Item -

Incoming Transfer

Transfer Rejected

Transfer Request

Search

Excel

Search...

Rows per page 10

Transfer From Point of Entry	Transfer To Point of Entry	Child Reference ID	Child's Last Name	Child's First Name	Status	Alert Name	Days Since Created	Days Since Rejected	Child's 3rd Birthday	Action
		11	PCGGadsdon	Philomena	Active	Incoming Transfer	530		03/25/2025	Receive Transfer
		32	PCG-Galbreath	Payton	Active	Incoming Transfer	5278		12/12/2024	Receive Transfer
		55	PCG-Galbreath	Payton	Active	Incoming Transfer	553		10/01/2024	Receive Transfer
		58	Barney	Charles	Active	Incoming Transfer	528		03/03/2023	Receive Transfer



Transferring a Child

Accepting/Declining a Transfer

How To

Accept or Decline Child's Record

Step / Action

1. Select the **Transfer Alert** dashboard.
2. Select the **Incoming Transfer** Dashboard Alert drop-down
3. Select the **Search** button. Children associated with the respective filter will populate.
4. Select the **Receive Transfer** button.

The screenshot shows the 'Transfer Alerts' dashboard. On the left is a navigation menu with 'Transfer Alerts' highlighted. The main area has a 'Report Filters' section with a dropdown menu open, showing 'Incoming Transfer' selected. A 'Search' button is to the right. Below is a table with columns: Transfer From Point of Entry, Transfer To Point of Entry, Child Reference ID, Child's Last Name, Child's First Name, Status, Alert Name, Days Since Created, Days Since Rejected, Child's 3rd Birthday, and Action. Two rows are visible, each with a 'Receive Transfer' button. An 'Excel' button is in the top right of the table area.

Transfer From Point of Entry	Transfer To Point of Entry	Child Reference ID	Child's Last Name	Child's First Name	Status	Alert Name	Days Since Created	Days Since Rejected	Child's 3rd Birthday	Action
		11	PCGGadsdon	Philomena	Active	Incoming Transfer	531		03/25/2025	Receive Transfer
		32	PCG-Galbreath	Payton	Active	Incoming Transfer	5279		12/12/2024	Receive Transfer



Transferring a Child

Accepting/Declining a Transfer

How To

Accept or Decline a child's transfer as a receiving county

Step / Action

1. After selecting the Receive Transfer button, the **Receive Transfer** window populates.
2. In the **Accepted/Declined Section**, choose 'Accepted' or 'Declined' from the **Transfer Accepted/Declined** field.
3. The **Date Accepted/Declined** field is prepopulated with today's date.
4. Enter any relevant comments into the **Receiver Comments** fields. This is optional.
5. The **Transfer Accepted/Declined By** field is prepopulated with the name of the end-user accepting the request.
6. Select the **Submit** button to save your entry.

Receive Transfer

*Transfer Request
To Send

*Transfer Date
05/26/2022
 *Parent has been notified that early intervention information has been shared with new location

Sender Comments
Saratoga requesting Albany transfer record of a child they had

*Transfer From Point Of Entry
Bright Start Services

*Transfer To Point Of Entry
Birth To Three Developmental Center

Transfer Initiated By

Accepted/Declined Section
*Transfer Accepted/Declined
Accepted

Date Accepted/Declined
12/13/2023

Receiver Comments

Transfer Accepted/Declined By

Submit Cancel



Entering a Request to Receive a Child from Another Provider Agency.

Transfer, Exit, and Close

Transferring a Child

Submitting a Transfer Request

How To

Enter a transfer request to receive a child's record

Note

- A **Transfer Request** can be defined as Provider Agency B requesting the transfer of a child's record from Provider Agency A (a pull action). This request may occur as a result of Provider Agency B being contacted by a family who has recently relocated from an area serviced by Provider Agency A.
- Provider Agency B should reach out to Provider Agency A to notify Provider Agency A that a child currently assigned to their caseload has relocated to Provider Agency B's service area and the child's record will need to be sent to Provider Agency B.
- After notifying Provider Agency A of the confirmed relocation, Provider Agency B will follow up by submitting a formal request in ACORN for Provider Agency A to transfer the child's record to Provider Agency B. This section covers what a transfer request looks like in ACORN.



Transferring a Child

Submitting a Transfer Request

How To

Enter a transfer request to receive a child's record

Note

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

Step / Action

1. To initiate the transfer of a Child's record, search for the Child using the **Child Lookup** functionality. Proceed to locate (using the Child Lookup filters) and select the child needing to be transferred.
2. Select the **Edit** button next to the child needing to be transferred.

The screenshot shows the 'Child Lookup' interface. On the left is a sidebar menu with 'Child Lookup' selected, indicated by a callout '1'. The main area is titled 'Lookup' and contains 'Child Lookup Results'. Below this is a 'Report Filters' section with several dropdown menus and input fields for filtering results. A 'Search' button is located at the bottom right of the filter section. Below the filters is a table of results with columns for Last Name, First Name, Birth Date, Phone, Address, City, State, Zip, County, County of Residence, EIOD Name, Family Resources Coordinator, Child Status, and Action. Two rows are visible in the table, both for 'PCG-Gadsden'. The first row has a first name of 'Pearl' and a coordinator of 'Mattis, John'. The second row has a first name of 'Philibert' and a coordinator of 'MORENO, AIDA'. Both rows have a status of 'Active'. Callout '2' points to the 'Request Transfer' and 'Edit' buttons in the 'Action' column for the second row. An 'Excel' button is visible in the top right corner of the table area.

Last Name	First Name	Birth Date	Phone	Address	City	State	Zip	County	County of Residence	EIOD Name	Family Resources Coordinator	Child Status	Action
PCG-Gadsden	Pearl	02/04/2022		151 W 34TH ST			10001-2101	Adams	Adams		Mattis, John		Request Transfer Edit
PCG-Gadsden	Philibert	04/09/2022		151 W 34TH ST			10001-2101	King	King		MORENO, AIDA	Active	Request Transfer Edit



Transferring a Child

Submitting a Transfer Request

How To

Enter a transfer request to receive a child's record

Note

- A child may have multiple transfers
- All completed transfer requests appear in the **Child Transfer** grid.

Step / Action

1. Select the **Transfer** tab. The system defaults to the **Child Transfer Report** panel.
2. Select the **Add Child Transfer** button located on the **Child Transfer** grid to add a new transfer.
3. Select the **Edit** button, if you are completing or revising an existing transfer.

The screenshot shows a software interface with a navigation bar at the top containing tabs: Child at a Glance, Child Info, Family Info, Funding Sources, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition, **Transfer**, and Exit and Close. Below the navigation bar is a 'Child Transfer Report' panel. On the left side of this panel is a vertical 'Child Transfer Report' sidebar. The main area is titled 'Child Transfer' and contains a yellow 'Add Child Transfer' button. Below this is a table titled 'The Child Transfer Grid'. The table has columns: Transfer From Point of Entry, Transfer To Point of Entry, Transfer Initiated By, Transfer Accepted/Declined, Date Accepted/Declined, Transfer Accepted/Declined By, Sender Comments, Receiver Comments, and Action. A row is visible with 'Birth to Three - Pierce County' in the first column and 'Boost Collaborative' in the second. An 'Edit' button is located in the Action column of this row. At the bottom of the grid are 'Prev', '1', and 'Next' navigation buttons. A search bar with the text 'tries' is located below the grid. A green 'Excel' button is in the top right corner of the grid area. Three callout boxes with numbers 1, 2, and 3 are overlaid on the image: 1 points to the 'Transfer' tab, 2 points to the 'Add Child Transfer' button, and 3 points to the 'Edit' button.

Transfer From Point of Entry	Transfer To Point of Entry	Transfer Initiated By	Transfer Accepted/Declined	Date Accepted/Declined	Transfer Accepted/Declined By	Sender Comments	Receiver Comments	Action
Birth to Three - Pierce County	Boost Collaborative							Edit

Transferring a Child

Submitting a Transfer Request

How To

Enter a transfer request to receive a child's record

Note

- “To receive” indicates your provider agency is requesting to receive a new child into their caseload.
- A child may have multiple transfers.
- A child remains the current provider agency’s responsibility until the child is accepted by the receiving provider agency.
- Upon submitting the transfer request, the receiving provider agency receives an alert that a “Transfer request” is pending approval on their **Transfer** dashboard. Once accepted, *most* activity related to the sending provider agency will cease (IFSPs service authorizations, etc.), however, billing/claiming activity remains active (when billing and claiming features are implemented).

Step / Action

1. Select **To Receive** 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 of the intended transfer**.
4. Notes can be entered in the **Senders Comments** text field. (*i.e., the family notified us that the child has relocated from your service area to our service area on March 15*). This is optional.
5. Use the type-ahead to select the **Transfer From Point of Entry/Provider Agency** and the **Transfer To Point of Entry/ Provider Agency**.
6. The **Transfer Initiated By** field prepopulates with the name of the end-user entering the transfer.
7. The **Accepted/Declined section** is reserved for the receiving provider agency only.
8. Select the **Submit** button to save your entry.

Child Transfer

Child Transfer

1 *Transfer Request
To Receive

*Transfer Date
11/01/2023

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

Sender Comments

*Transfer From Point Of Entry
Birth To Three Developmental Center

*Transfer To Point Of Entry
Bright Start Services

Transfer Initiated By
Michelle Carter

Accepted/Declined Section
Transfer Accepted/Declined: --- Select ---
Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

6 Submit



Accepting a Request to Send a Child's Record to Another Provider Agency

Transfer, Exit, and Close

Transferring a Child

Accepting/Declining a Transfer Request

How To

Accepting/Declining a Request to Send a Child's Record to Another Provider Agency

Step / Action

1. Select **Transfer Alerts** dashboard.
2. Select **Transfer Request** from the **Dashboard Alert** drop-down. A list of children waiting to be transferred to another provider agency populate.
3. Select the **Receive Transfer** button from the **Transfer Alerts** dashboard.

The screenshot displays the 'Transfer Alerts' dashboard. On the left is a navigation menu with 'Transfer Alerts' selected. The main area features a 'Transfer Alerts' header with a report filter dropdown set to 'Transfer Request'. Below this is a table of alerts. The first row shows a child named Clarissa (Child Reference ID 125) with a 'Transfer Request' alert, and a 'Receive Transfer' button in the 'Action' column. The second row shows a child named Plato (Child Reference ID 139) with a 'Transfer Request' alert and a 'Receive Transfer' button. A search bar and 'Excel' button are also visible.

Transfer From Point of Entry	Transfer To Point of Entry	Child Reference ID	Child's Last Name	Child's First Name	Status	Alert Name	Days Since Created	Days Since Rejected	Child's 3rd Birthday	Action
		125	Mockingbird	Clarissa	Active	Transfer Request	567		04/26/2023	Receive Transfer
		139	PCG-Galletly	Plato	Active	Transfer Request	548		03/08/2024	Receive Transfer



Transferring a Child

Accepting or Declining a Transfer

How To

Accepting/Declining a Request to Send a Child's Record to Another Provider Agency

Step / Action

1. After selecting the Receive Transfer button, the **Receive Transfer** window populates.
2. In the **Accepted/Declined Section**, choose 'Accepted' or 'Declined' from the **Transfer Accepted/Declined** field.
3. The **Date Accepted/Declined** field is prepopulated with today's date.
4. Enter any relevant comments into the **Receiver Comments** fields. This is optional.
5. The **Transfer Accepted/Declined By** field is prepopulated with the user's name.
6. Select the **Submit** button to save the entry.

The screenshot shows a web form titled "Receive Transfer". The form contains several fields and sections:

- *Transfer Request**: A dropdown menu with "To Receive" selected.
- *Transfer Date**: A text field containing "05/26/2022".
- *Parent has been notified that early intervention information has been shared with new location**
- Sender Comments**: A text area containing "Saratoga requesting Albany transfer record of a child they had".
- *Transfer From Point Of Entry**: A search field with "Point Of Entry" and a magnifying glass icon.
- *Transfer To Point Of Entry**: A search field with "Point Of Entry" and a magnifying glass icon.
- Transfer Initiated By**: A text field.
- Accepted/Declined Section**:
 - *Transfer Accepted/Declined**: A dropdown menu with "Accepted" selected. A purple dashed arrow points to this dropdown, which has a small menu open showing "Select", "Accepted", and "Declined".
 - Date Accepted/Declined**: A text field containing "12/14/2023".
 - Receiver Comments**: A large text area.
 - Transfer Accepted/Declined By**: A text field.
- Submit** and **Cancel** buttons at the bottom.



Viewing Rejected

Transfer, Exit, and Close

Transferring a Child

Transfer Rejections

How To

Locate Transfer Rejections

Note

- The **Transfer** dashboard alerts provider agencies of **three circumstances** related to child transfers:
 - **Transfer Request:** Provider Agency A receives a **new** request from Provider Agency B to transfer the child from Provider Agency A to Provider Agency B
 - **Incoming Transfer:** Transfer is waiting to be acted on
 - **Transfer Rejected:** The provider agency rejects a transfer request from another provider agency
- To view a list of rejected requests, please select the **Transfer Rejected** option from the **Dashboard alert** drop-down.

The screenshot shows a software interface for 'Transfer Alerts'. On the left is a navigation menu with items like 'Children Assigned to Caseload', 'Transfer Alerts', 'Referrals', etc. The main area has a green header 'Transfer Alerts' and a 'Report Filters' section. A dropdown menu is open, showing 'Transfer Rejected' selected. Below the filters is a table with columns: 'Transfer From Point of Entry', 'Transfer To Point of Entry', 'Child Reference ID', 'Child's Last Name', 'Child's First Name', 'Status', 'Alert Name', 'Days Since Created', 'Days Since Rejected', 'Child's 3rd Birthday', and 'Action'. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Prev' and 'Next' buttons at the bottom right of the table area. An 'Excel' button is visible in the top right corner of the table area.



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

- 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 and Close** tab.
2. Select the **Child Exit** panel.
3. Select the **Add Child Exit** button.

The screenshot displays a software interface for managing child records. At the top, a navigation bar includes tabs for 'Child at a Glance', 'Child Info', 'Family Info', 'Funding Sources', 'Eval Info', 'Eligibility', 'IFSP', 'Services', 'Child/Family Outcomes', 'Transition', and 'Transfer'. Below this, the 'Exit and Close' section is active, with a sub-tab for 'Document'. A left-hand sidebar contains two panels: 'Child Exit' (selected) and 'Child Reopen/Reactive'. The main content area features a green header bar with 'Child Exit' and an 'Exit/Close' dropdown menu. Below the header is a yellow 'Add Child Exit' button and a green 'Excel' button. A search bar with a magnifying glass icon and the text 'Search...' is present. To the right of the search bar is a 'Rows per page' dropdown menu set to '10'. Below these elements is a table with the following columns: 'Exit Date', 'Exit Reason', 'Date of Death', 'Closure Amendment', 'Completed By', and 'Action'. The table currently contains no data, with the text 'No data available in table' displayed. At the bottom of the table area, it says 'Showing 0 to 0 of 0 entries' and includes 'Prev' and 'Next' navigation buttons.



Child Exit/Close

Exit/Close

How To

Exit/Close a Child Record

Step / Action

1. Select the **Exit Date** from the **Exit Date** field.
2. Select the appropriate **Exit Reason** from the **Exit Reason** field.
3. The **Completed By** field automatically prepopulates with the current user's name.
4. Select the **Submit** button.

--- Select ---

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

Child Exit/Close

Child Exit/Close

*Exit Date
11/01/2023

*Exit Reason
Attempts to contact unsuccessful

Completed By
Janice Morris

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

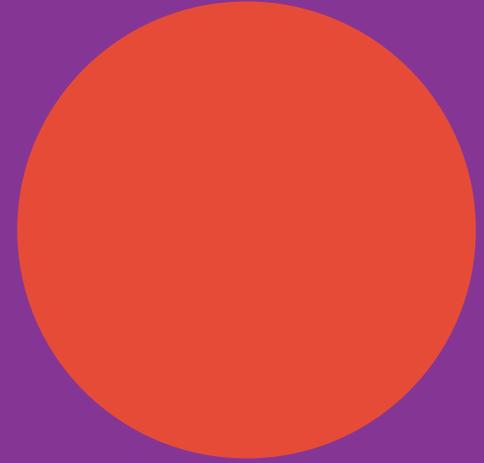
1. Select the **Exit and Close** tab.
2. Select the **Child Reopen/Reactivate Child** panel.
3. Select the **Add Reopen/ Reactivate** button.
4. The username will automatically populate in the **Case Reopened/ Reactivated By** field.
5. Select **Reopened/Reactivation Reason** from the **Reopened/ Reactivation 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 to save your entry.

The screenshot shows a software interface with a navigation bar at the top containing tabs: Child at a Glance, Child Info, Family Info, Funding Sources, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition, Transfer, Exit/Reopen, and Document. The 'Exit/Reopen' tab is active. Below the navigation bar, there is a sidebar with 'Child Exit' and 'Reopen/Reactivate Child'. The main content area is titled 'Reopen/Reactivate' and features a green header with a search icon, a '-Default Report-' dropdown, and a settings icon. Below this is a yellow 'Add Reopen/Reactivate' button and an 'Excel' button. A search bar is present with the text 'Search...'. To the right of the search bar is a 'Rows per page' dropdown set to '10'. Below the search bar is a table with the following columns: Reopen/Reactivation Date, Reopened/Reactivated By, Reopen/Reactivation Reason, Modification Reason, Other Reason, Comments, and Action. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Prev' and 'Next' buttons at the bottom right of the table.

The screenshot shows the 'Reopen/Reactivate Child Record' form. The 'Case Reopened/Reactivated By' field is populated with 'autoqasuper'. The '*Reopen/Reactivation Reasons' dropdown menu is open, showing a list of options: --- Select ---, Case closed in error, Family re-established contact, Insurance Adjustment, Legal Matter, Modifications to Child Record, Municipal Audit, Other, and SDOH Monitoring/Audit. A red dashed arrow points from the dropdown menu to the 'If Other, please explain' field. Below this field is another field for 'If "Modifications to Child Record" selected, please explain'. The '*Reopen/Reactivation date' field is empty. The 'Comments' field is also empty. A purple 'Submit' button is located at the bottom right of the form.



Thank you!



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Revision History

Version Number	Release Date	Author	Revision Summary
v.1	6.6.2023	Courtney Pittman	Final draft before first Tier-1 state training
v.2	9.12.2023	Courtney Pittman	Final draft before second Tier-1 state training
v.3	12.16.2023	Courtney Pittman	.v2 of Final

