# 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

| | |
|---|---|
| **TRANSFER** | 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.<br><br>•**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.<br><br>The Transfer actions are as follows:<br><br>• **Incoming Transfer:** Provider Agency A requests a transfer of a child to Provider Agency B (push)<br>•**Transfer Request:** County B requests the transfer of a child from County A (pull), or<br>•**Transfer Rejection:** In either scenario (1 or 2), the transfer recipient can reject a request.<br>*If a rejection occurs - a new alert will be generated.* |
| **EXIT** | 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).<br><br>The Child Exit area is used for federal reporting purposes |
| **CLOSE** | 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. |
| **NOTE** | 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). |

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

Transfer, Exit, and Close

# Transferring a Child

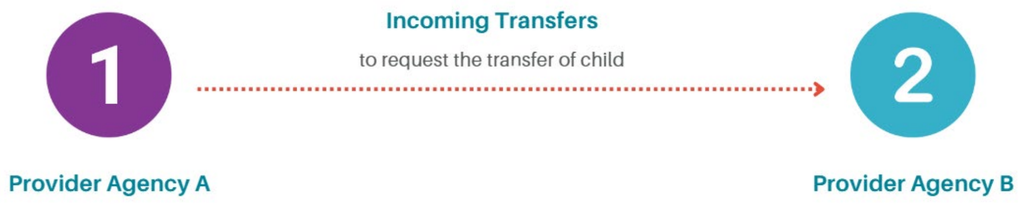
## *Submitting an Incoming Transfer Request*

### 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

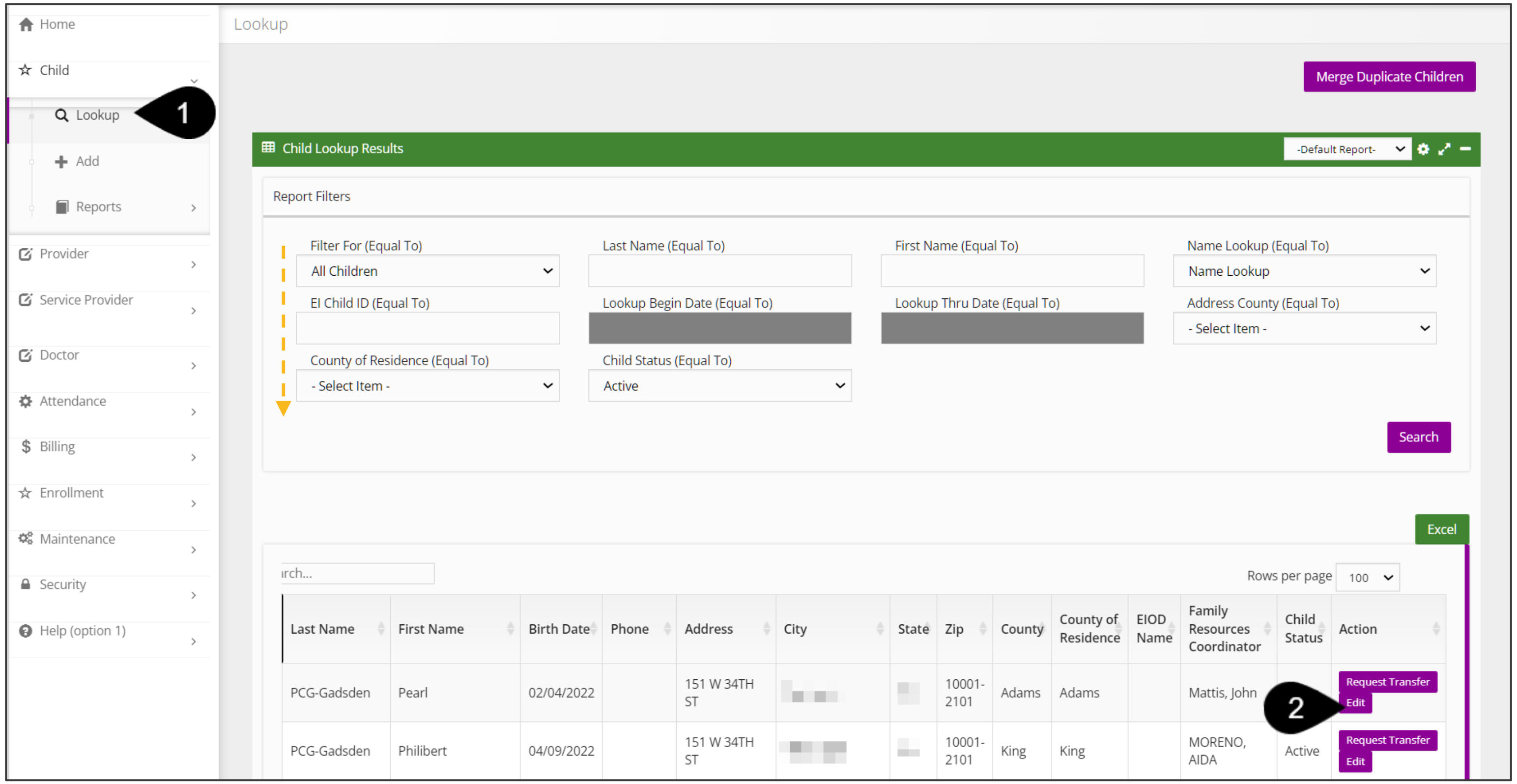
Enter a transfer request to send a child's record

### 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.



# Transferring a Child

## *Submitting an Incoming Transfer Request*

### How To

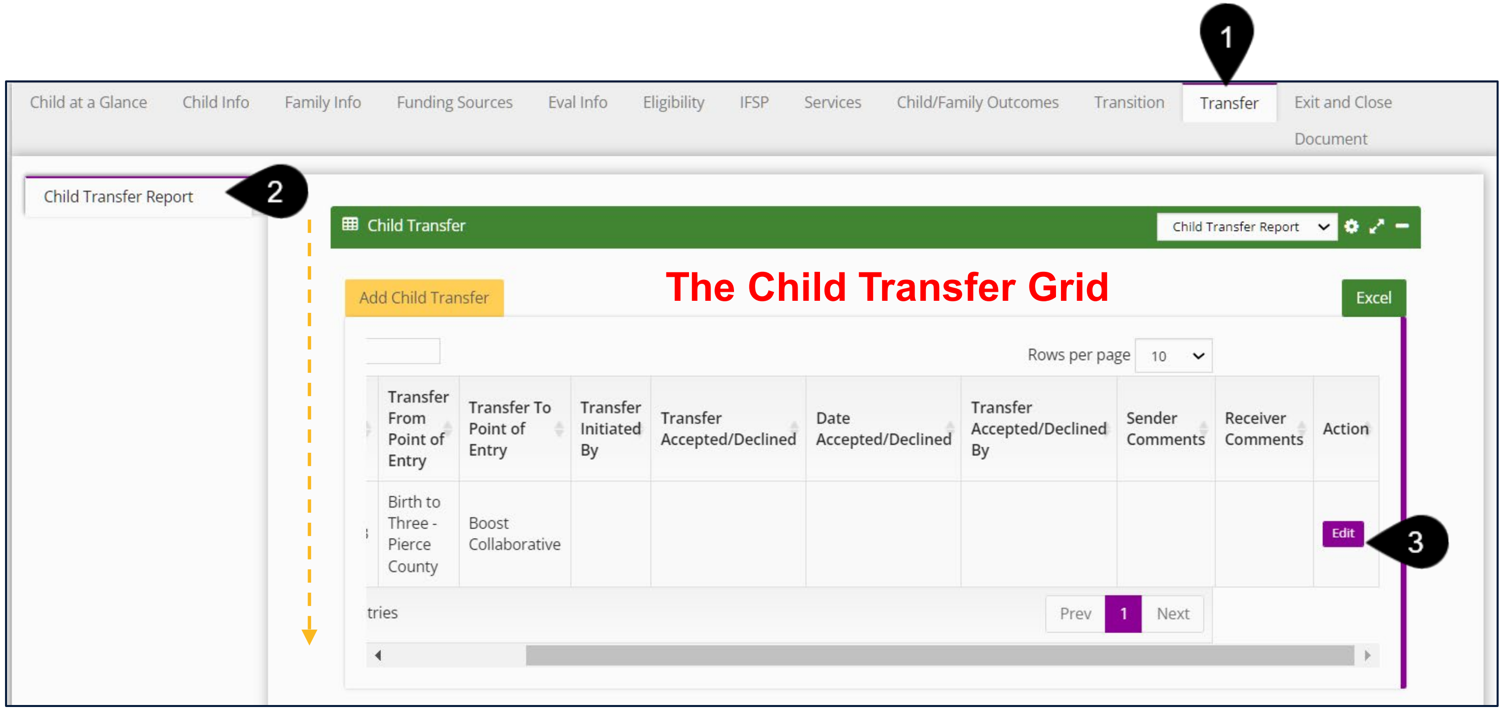
Enter a transfer request to send a child's record

### 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.



# Transferring a Child

## *Submitting an Incoming Transfer Request*

### How To

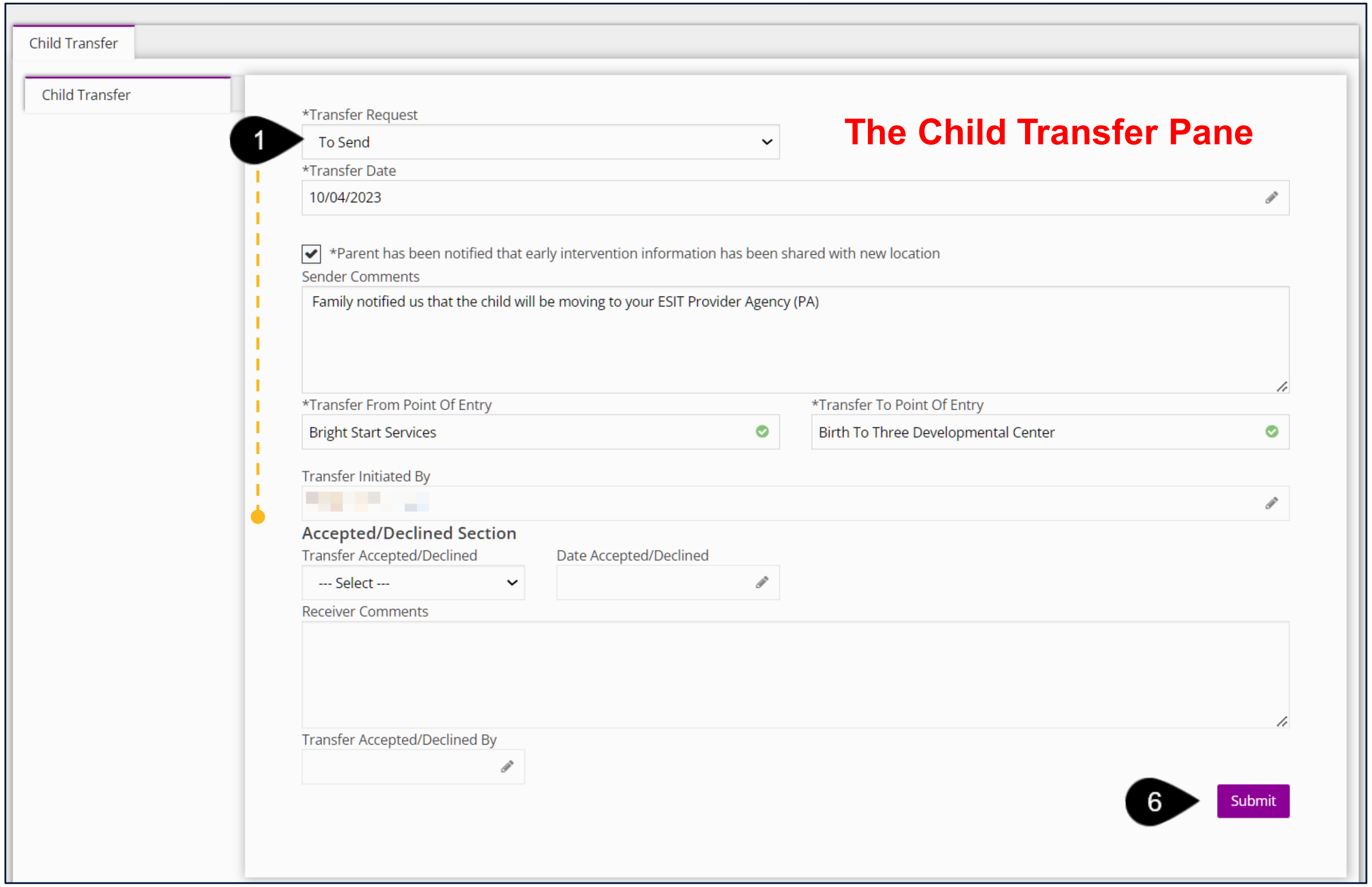
Enter a transfer request to send a child's record

### 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.



# Accepting a Request to Receive a Child’s Record to your Provider Agency

Transfer, Exit, and Close

# Transferring a Child

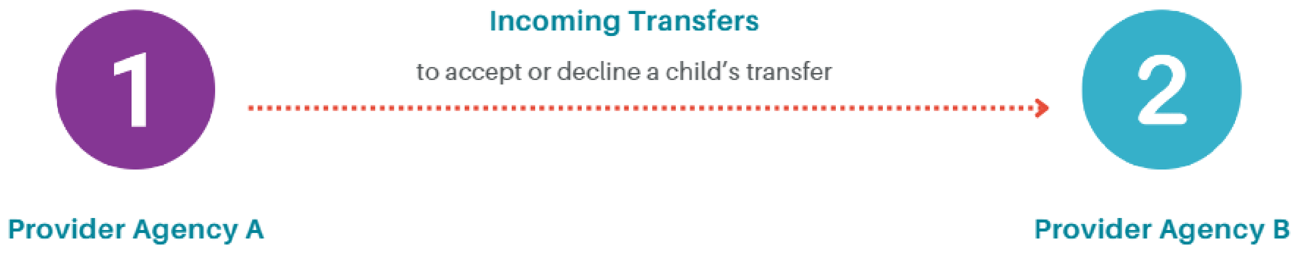
## *Accepting/Declining a Transfer*

### 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

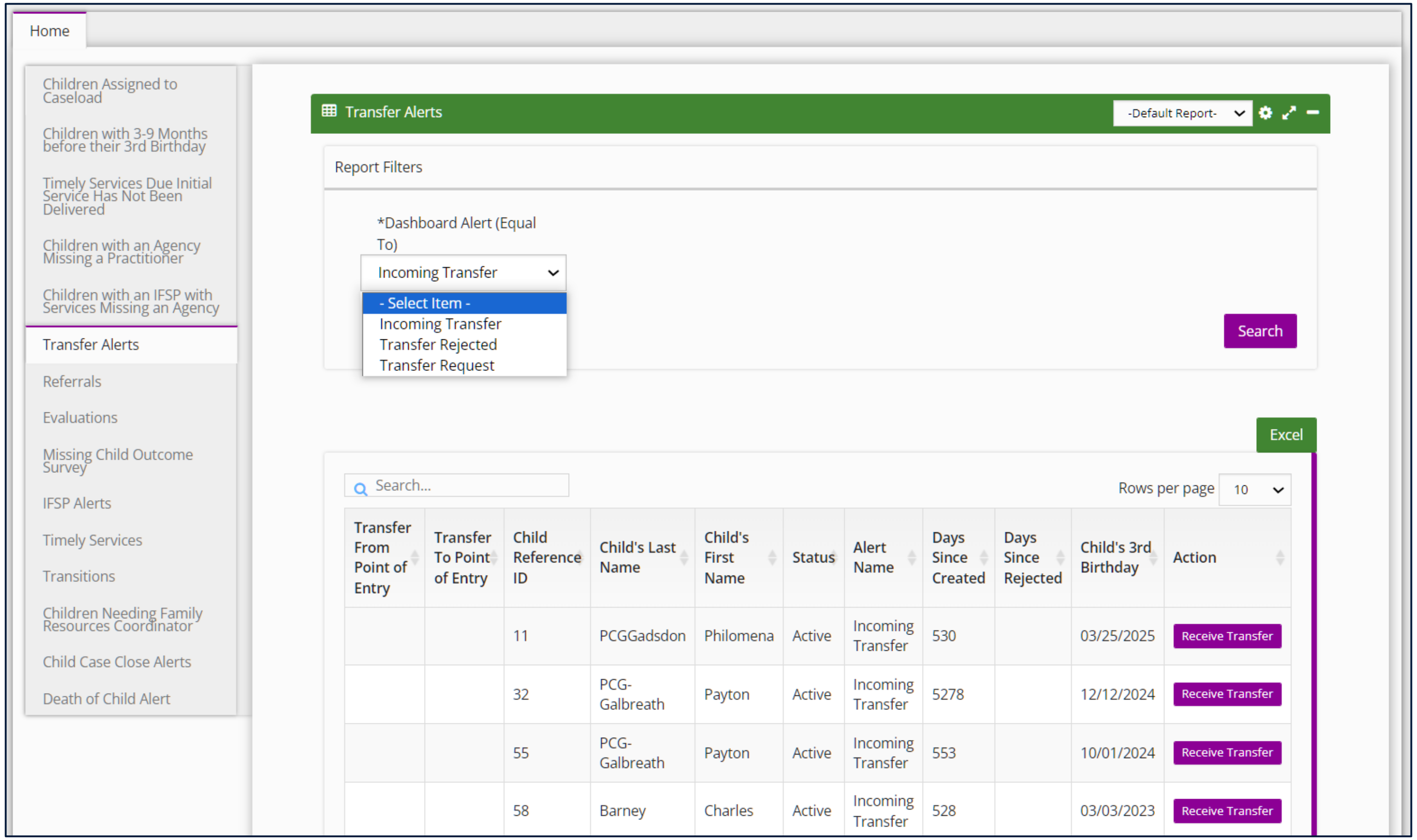
## *Accepting/Declining a Transfer*

### 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.



# Transferring a Child

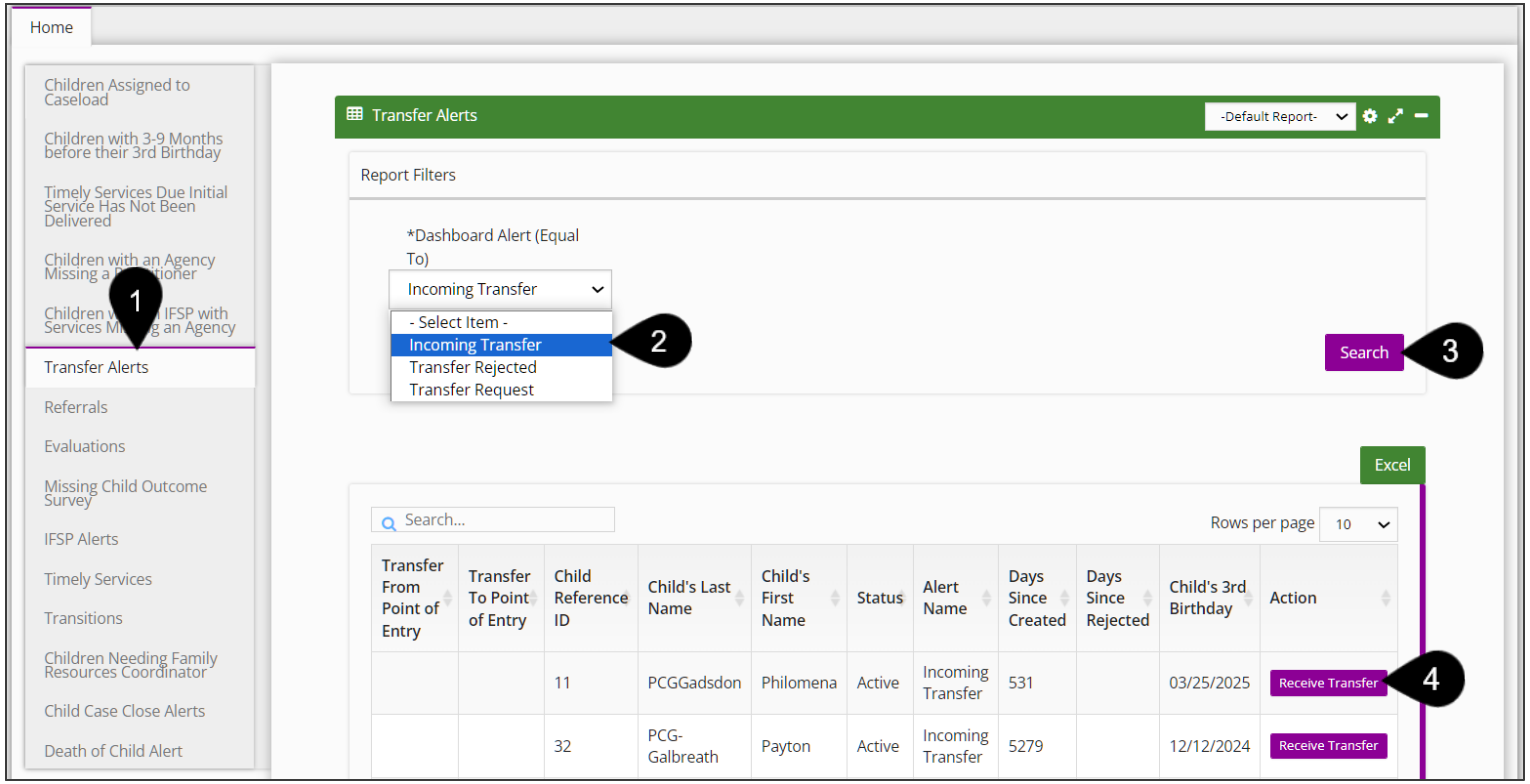
## *Accepting/Declining a Transfer*

### 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.



# Transferring a Child

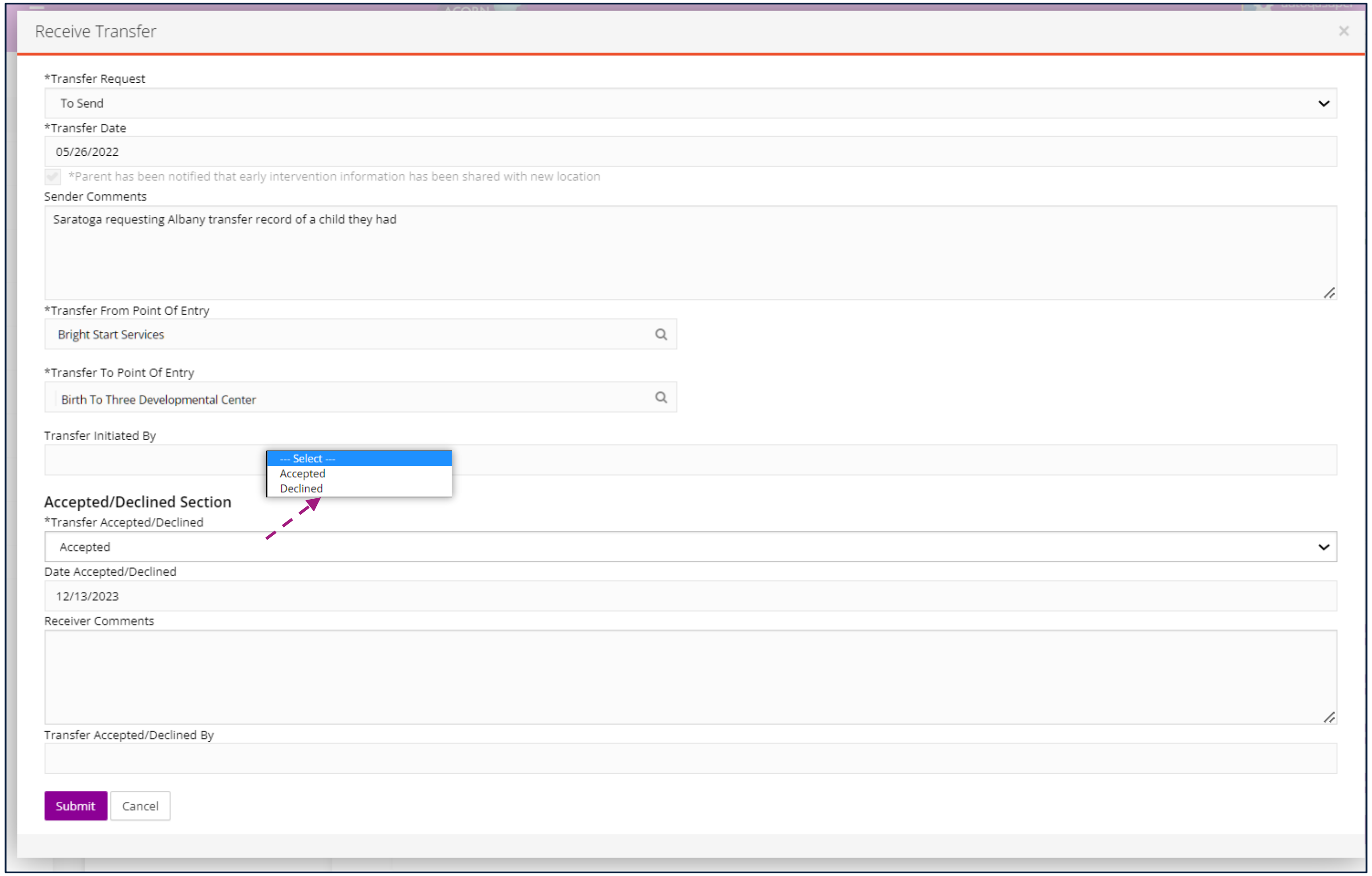
## *Accepting/Declining a Transfer*

### 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.



# 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

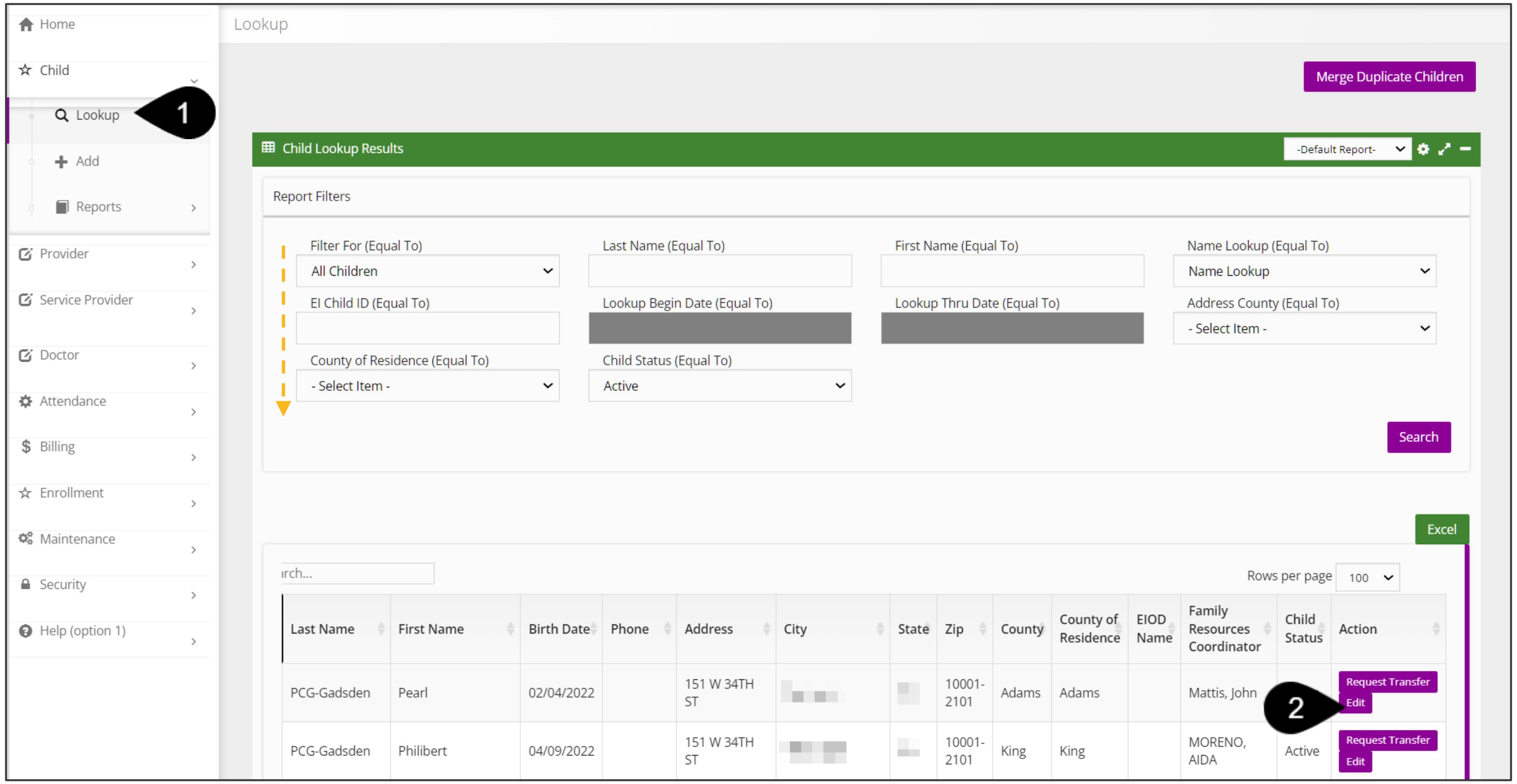
Enter a transfer request to receive a child's record

### 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.



# Transferring a Child

## *Submitting a Transfer Request*

### How To

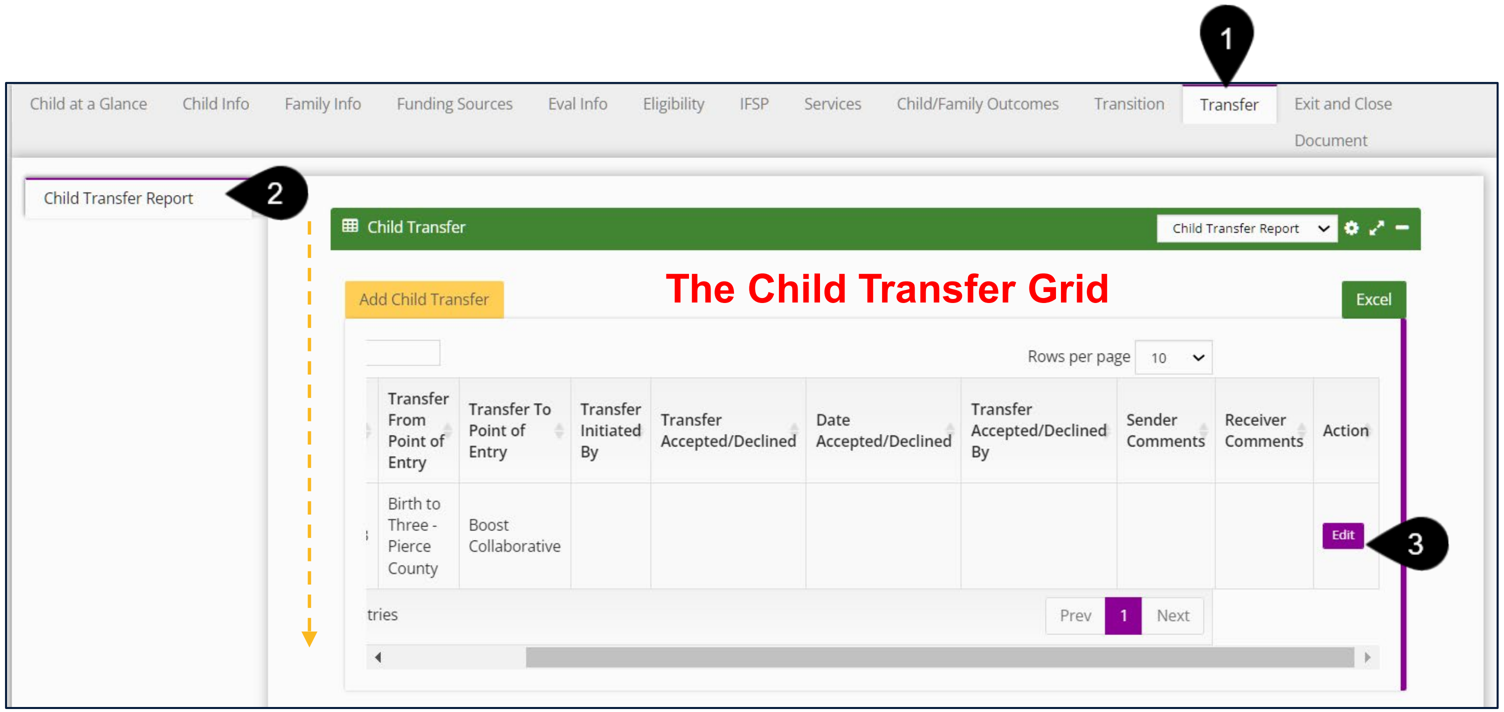
Enter a transfer request to receive a child's record

### 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.



# Transferring a Child

## *Submitting a Transfer Request*

### How To

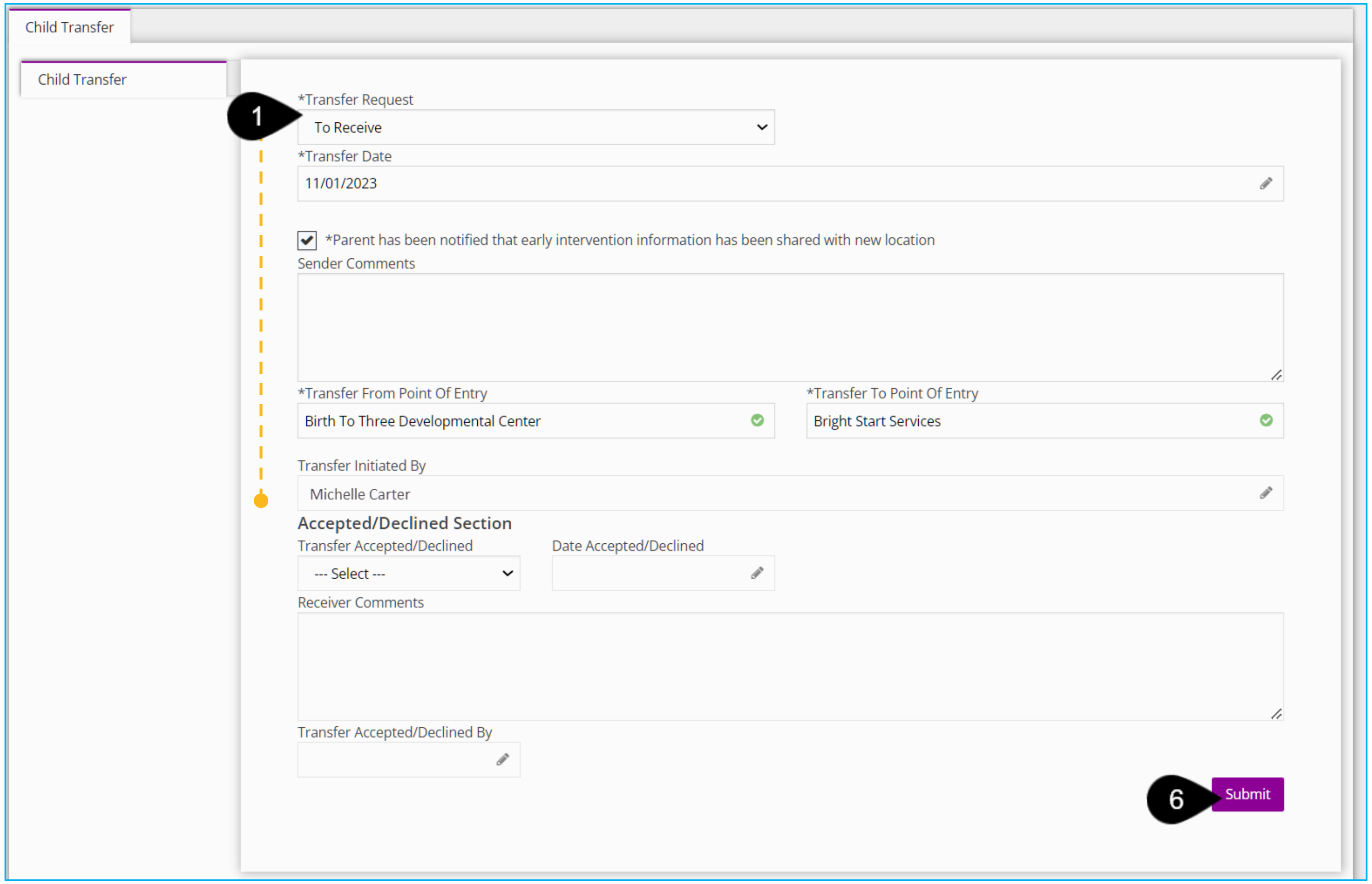
Enter a transfer request to receive a child's record

### 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.



# Accepting a Request to Send a Child’s Record to Another Provider Agency

Transfer, Exit, and Close

# Transferring a Child

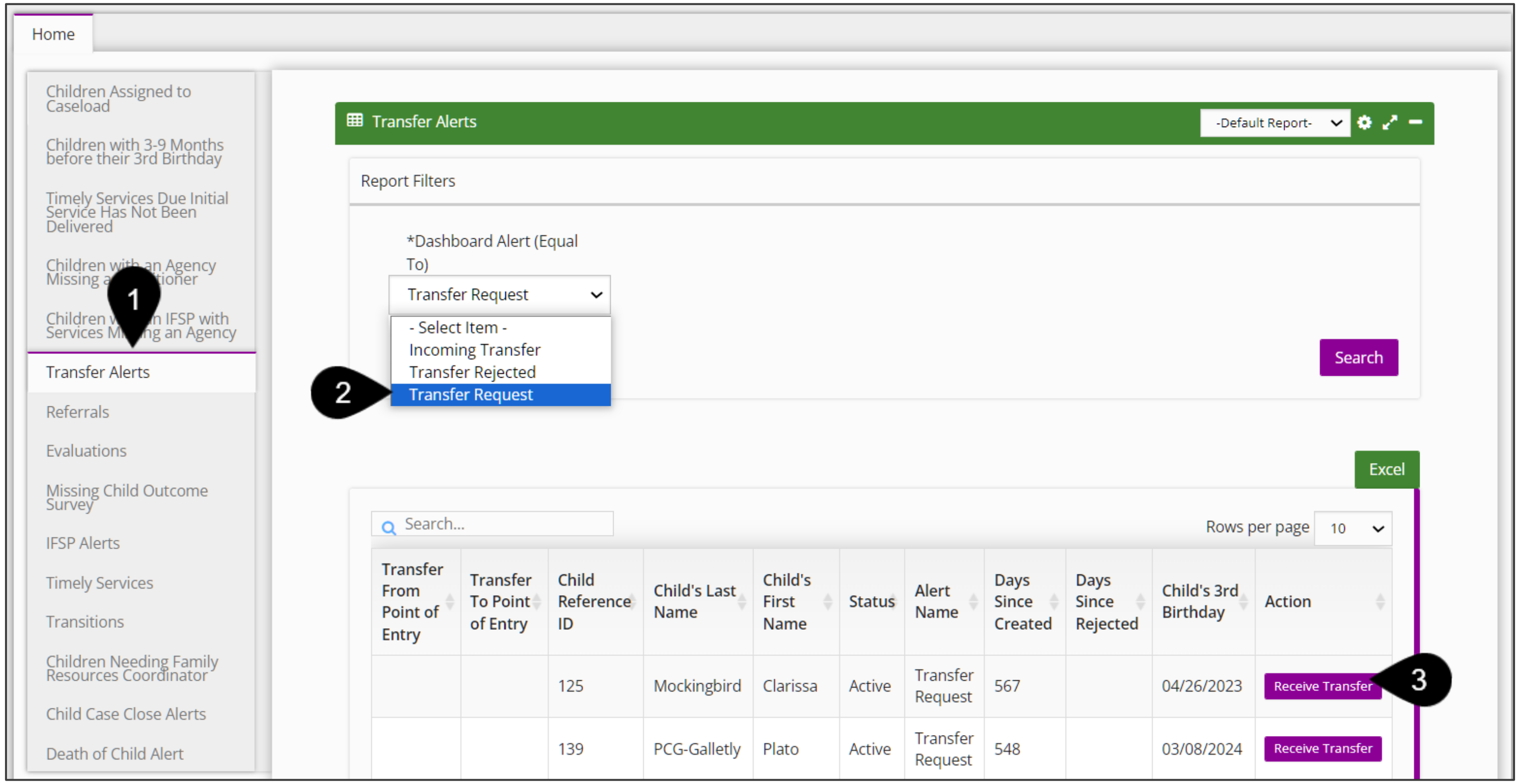
## *Accepting/Declining a Transfer Request*

### 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.



# Transferring a Child

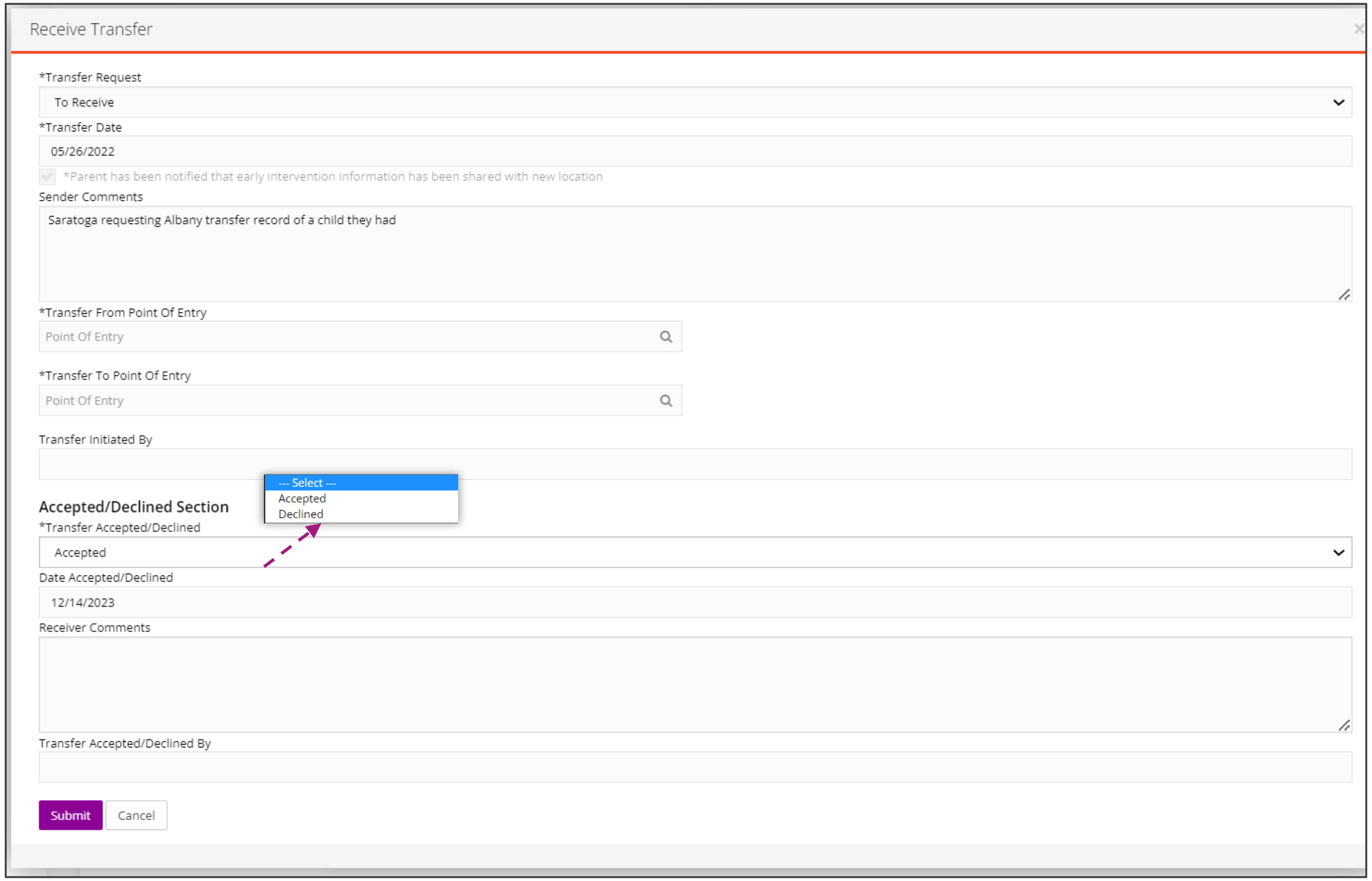
## *Accepting or Declining a Transfer*

### 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.



# Viewing Rejected

Transfer, Exit, and Close

# Transferring a Child

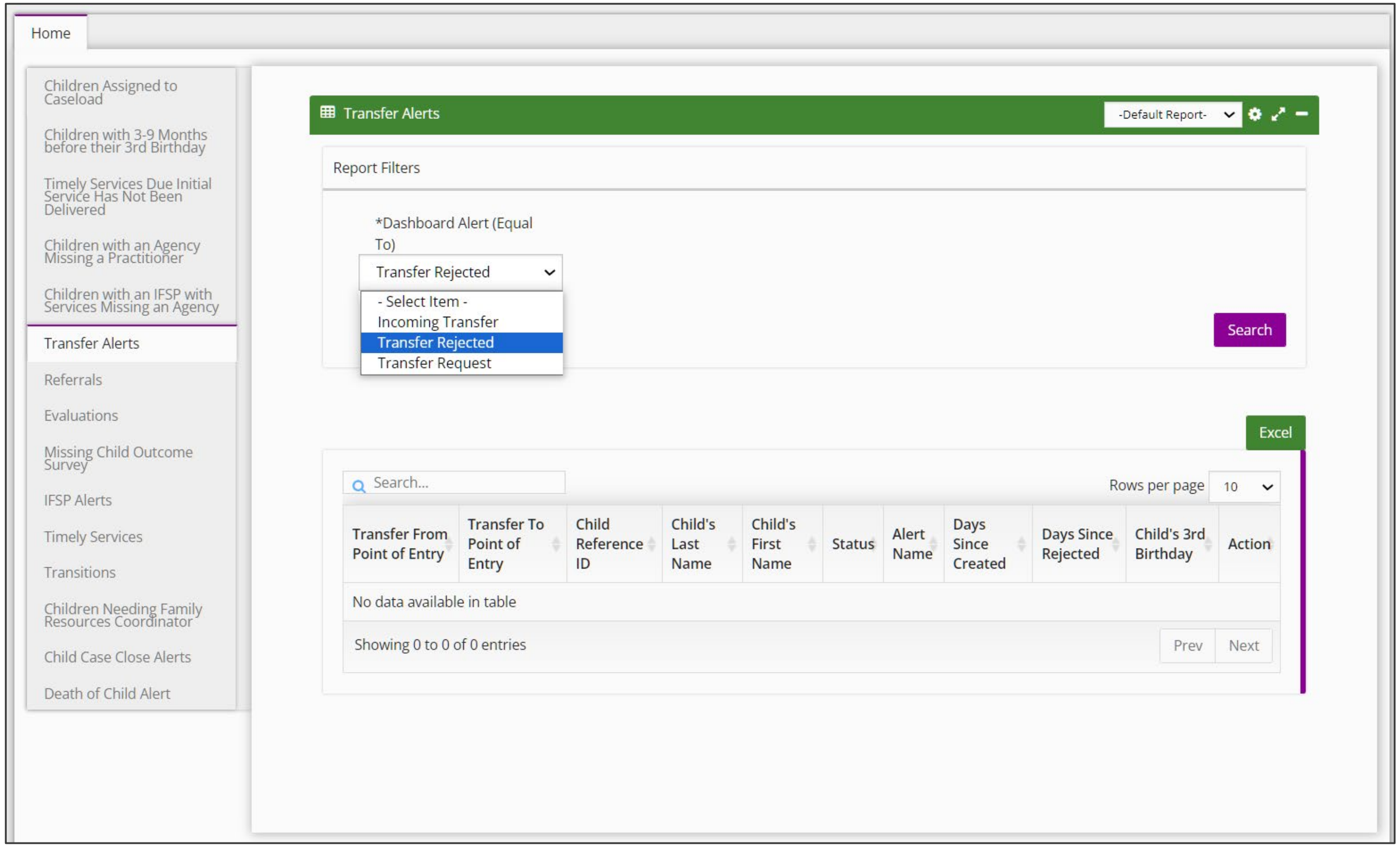
## *Transfer Rejections*

### 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.



# Closing and Reopening a Child’s Record

Transfer, Exit, and Close

# Child Exit/Close

## *Exit/Close*

### How To

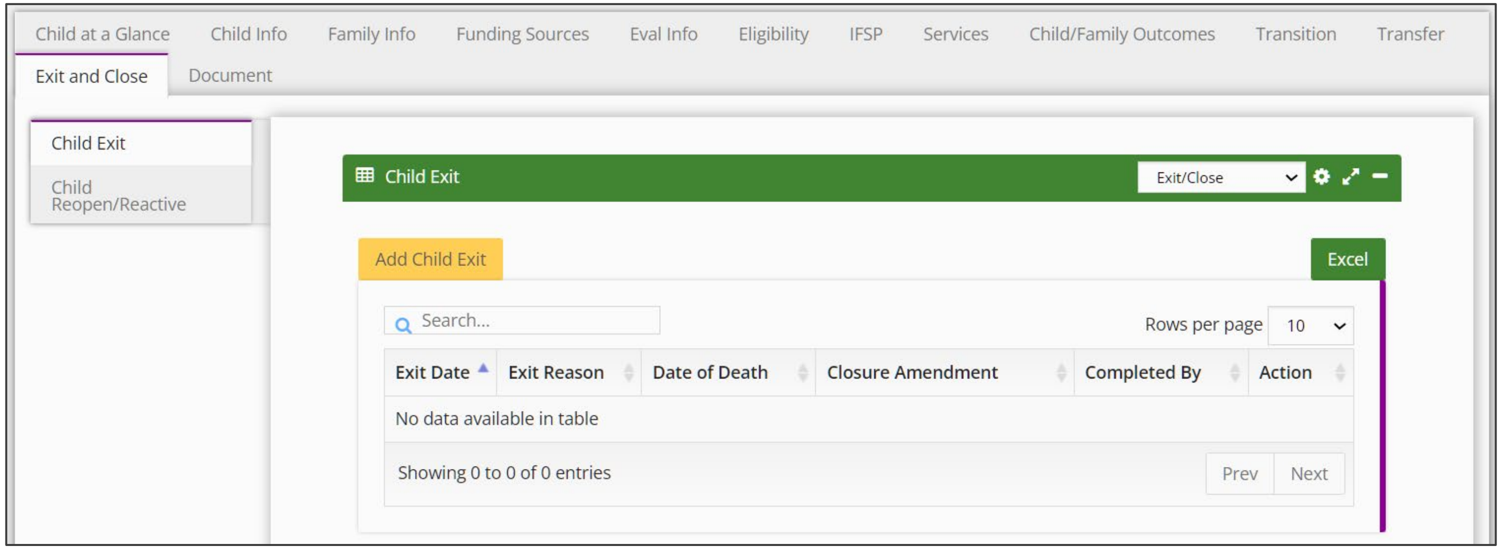
Exit/Close a Child's Record

### 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.



# Child Exit/Close

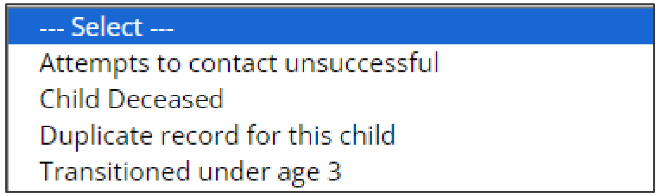
## *Exit/Close*

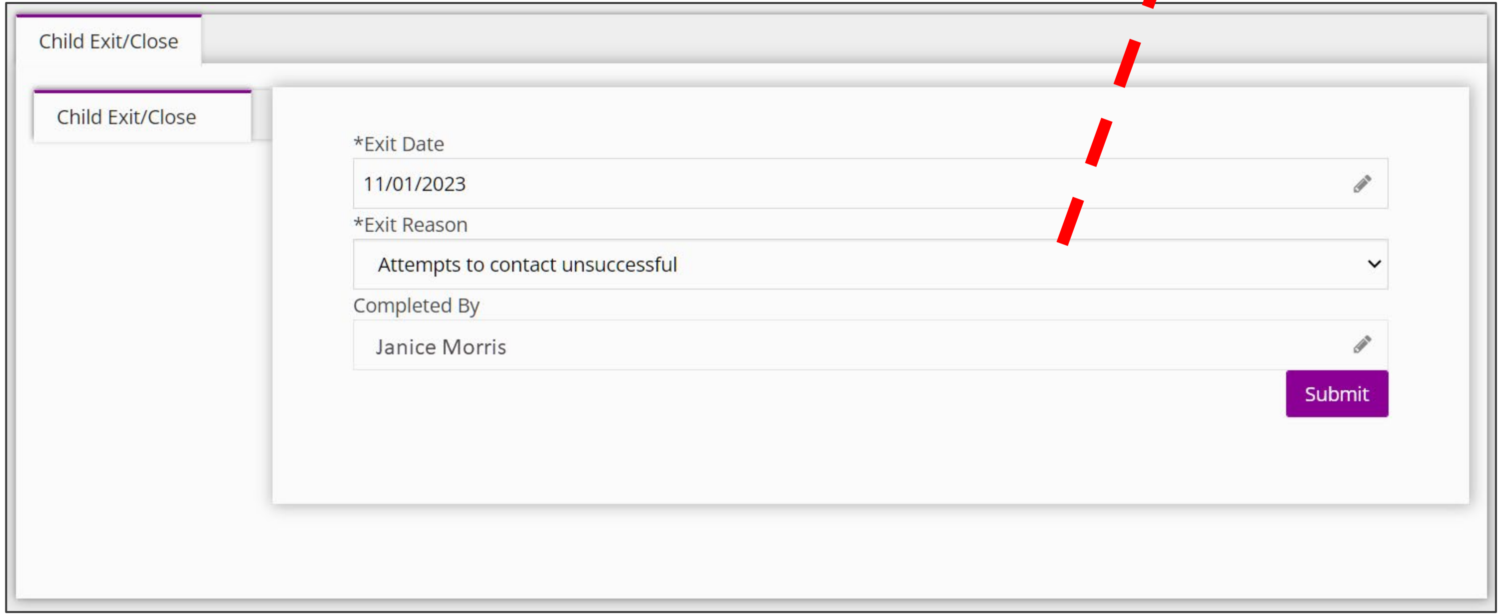
### How To

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.



# Child Exit/Close

## *Reopen/Reactivate Child Record*

### How To

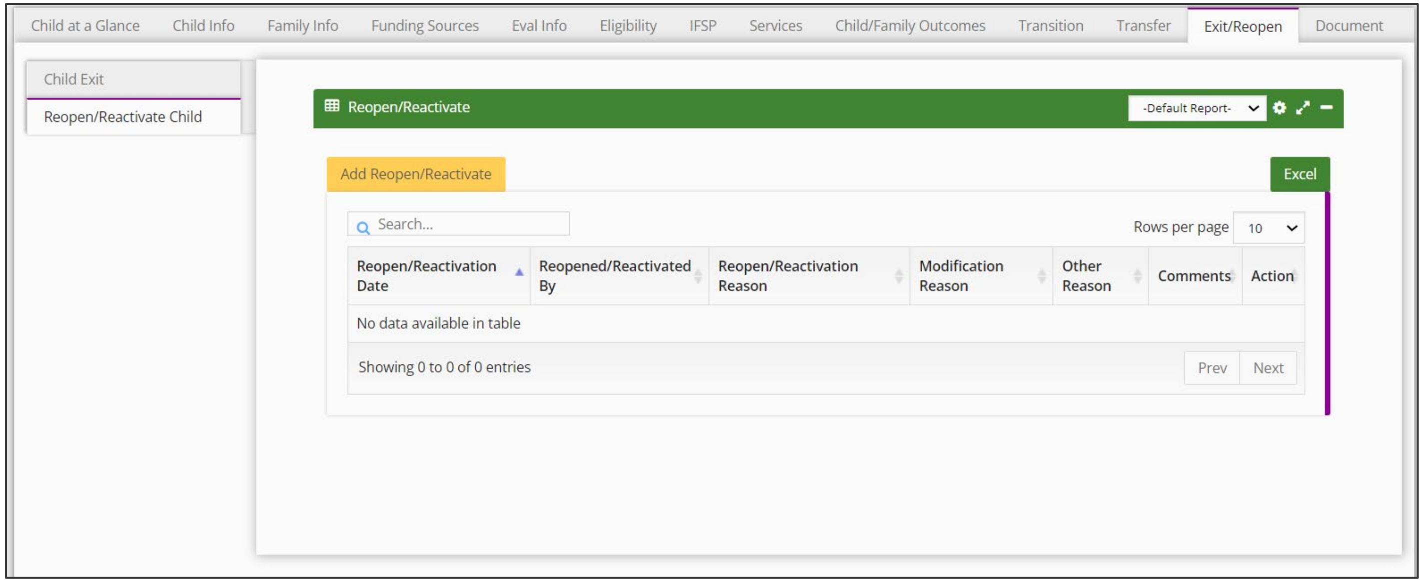
Reopen/Reactivate a Child's record

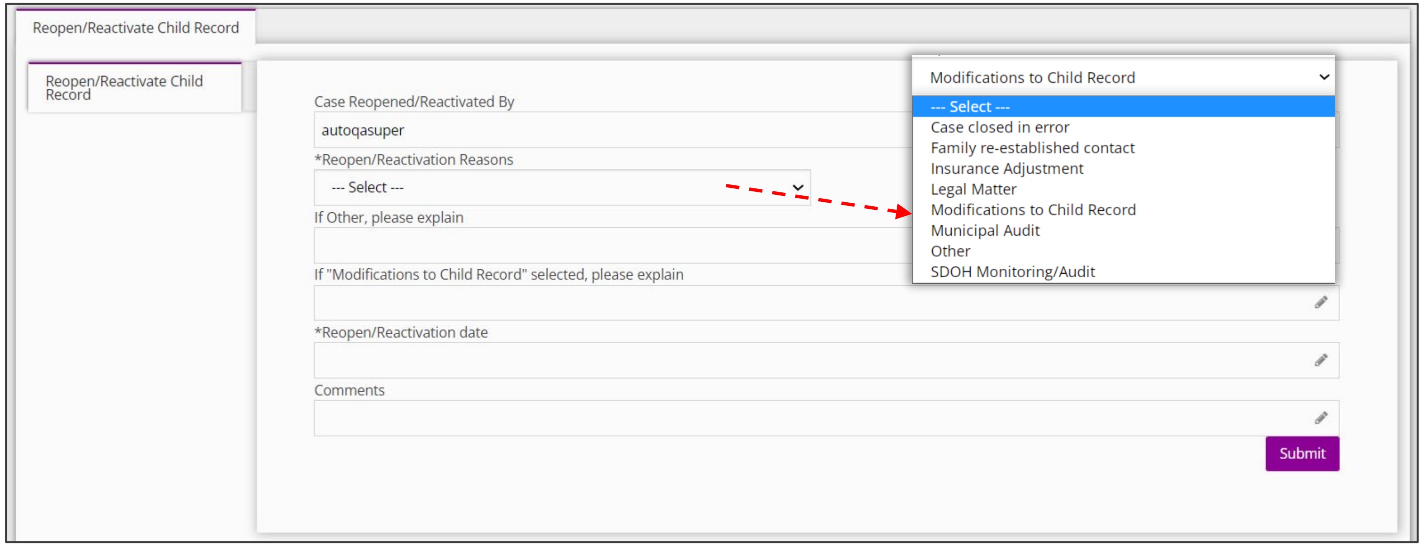
### Note

- 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.



# 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 |