



# Transfer, Exit, and Close

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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.



# 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).

| Child's Last Name | Child's First Name | County Name | Child Status | Date Of Birth | Action |
|-------------------|--------------------|-------------|--------------|---------------|--------|
| aaaaaaaaaaaa      | aaaaaaaaaaaa       | Adams       | Active       | 05/30/2022    | Edit   |
| Aaron             | Aaron              | Adams       | Active       | 06/07/2021    | Edit   |
| Adams             | Test - Bryan       | Adams       | Active       | 12/09/2021    | Edit   |
| Adding child      | Testing            | Adams       | Active       | 01/01/2023    | Edit   |
| Bond              | James              | Adams       | Active       | 03/01/2022    | Edit   |
| cbToeOff          | PkCCPk             | Adams       | Active       | 05/01/2022    | Edit   |
| cfGpGskabz        | NupeqfNNabhs       | Adams       | Active       | 06/01/2022    | Edit   |
| cfjyfcFpaya       | bAlfuNgegdgNPA     | Adams       | Active       | 05/01/2022    | Edit   |
| dan               | henry              | Adams       | Active       | 06/21/2022    | Edit   |
| Data              | Migration          | Adams       | Active       | 03/01/2022    | Edit   |

| Request*                    | Transfer Date | Transfer From County | Transfer To County | Transfer Initiated By | Transfer Accepted/Declined | Date Accepted/Declined | Transfer Accepted/Declined By | Transfer Accepted County | Action |
|-----------------------------|---------------|----------------------|--------------------|-----------------------|----------------------------|------------------------|-------------------------------|--------------------------|--------|
| No data available in table  |               |                      |                    |                       |                            |                        |                               |                          |        |
| Showing 0 to 0 of 0 entries |               |                      |                    |                       |                            |                        |                               |                          |        |



# 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 15<sup>th</sup>*).
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

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

Accepted/Declined Section  
Transfer Accepted/Declined  
--- Select ---

Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

Transfer Accepted County

Submit



# Transferring a Child

## Requesting a Transfer

### How To

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

### 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 14<sup>th</sup>*).
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.

The screenshot shows a web application interface for requesting a child transfer. The main form is titled "Child Transfer" and is divided into several sections:

- \*Transfer Request:** A dropdown menu currently set to "To Send".
- \*Transfer Date:** A text field containing "09/12/2023".
- Notification:** A checked checkbox with the text "\*Parent has been notified that early intervention information has been shared with new location".
- Sender Comments:** A large text area for entering notes.
- \*Transfer From County:** A dropdown menu set to "Adams".
- \*Transfer To County:** A dropdown menu set to "Clark".
- Transfer Initiated By:** A text field containing "Auto Super".
- Accepted/Declined Section:** A section with a dropdown menu set to "... Select ...", a "Date Accepted/Declined" field, and a "Receiver Comments" text area.
- Transfer Accepted/Declined By:** A text field.
- Transfer Accepted County:** A search field with a magnifying glass icon.
- Submit:** A purple button in the bottom right corner.



# 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

**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.

The screenshot shows a web application interface for managing child records. The top navigation bar includes tabs for '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. On the left, there is a sidebar with 'Child Exit' and 'Reopen/Reactivate Child' options. The main content area is titled 'Child Exit' and features an 'Add Child Exit' button, a search bar, and a table. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. The table headers are 'Exit Date', 'Exit Reason', 'Date of Death', 'Closure Amendment', 'Completed By', and 'Action'. There are also 'Prev' and 'Next' navigation buttons at the bottom of the table. An 'Excel' button is located in the top right corner of the table area.



# 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

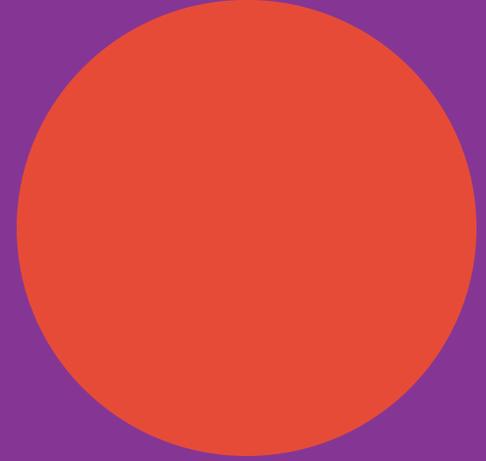
1. Select the **Exit/Reopen** tab.
2. Select the **Reopen/Reactivate Child** panel.
3. Select the **Add Reopen/ Reactivate** button.
4. The username will automatically populate in the **Case Reopened/ Reactivated By** field.
5. Select **Reopened/Reactivation Reason** from the **Reopened/ Reactivation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

The screenshot shows a software interface with a navigation menu at the top including '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. On the left, there is a sidebar with 'Child Exit' and 'Reopen/Reactivate Child'. The main area is titled 'Reopen/Reactivate' and features an 'Add Reopen/Reactivate' button, a search bar, and a table. The table has columns for 'Reopen/Reactivation Date', 'Reopened/Reactivated By', 'Reopen/Reactivation Reason', 'Modification Reason', 'Other Reason', 'Comments', 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' navigation buttons at the bottom right of the table. An 'Excel' button is located in the top right corner of the table area.

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 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. Other fields include 'If "Modifications to Child Record" selected, please explain', '\*Reopen/Reactivation date', and 'Comments'. A '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 | First Draft Release  |
| v.1.2          | 9.12.2023    | Courtney Pittman | Second Draft Release |

