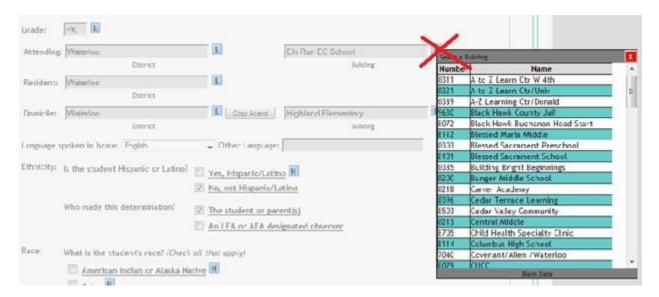
Transferring a Child While an IEP is Open

(Email communication about this process was emailed in April of 2015):

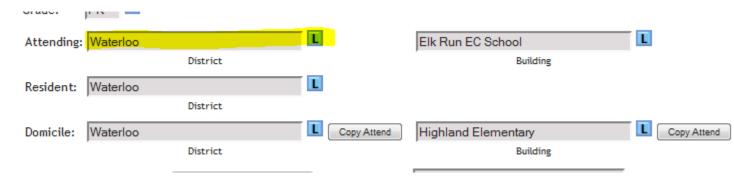
It has come to our attention that there is still some confusion on how to transfer a child while an amendment, reeval or review is open. Some of this information my apply to some, while others it may not. This is for informational purposes only.

The most common error we are seeing in transferring a kid while an IEP is open, is the changing of the attending building on the Family page to reflect the new building and then using the change provider button on the F page to change the provider to the new service provider.

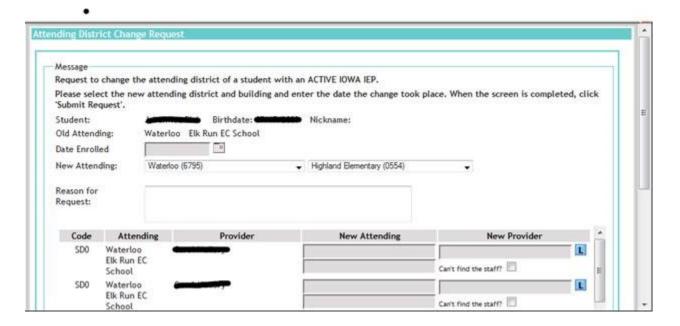


While technically this will look correct as now the kid would have the correct building on the Family page and the change provider request will put them with the correct teacher, there is a more efficient and easier way to transfer a child while the IEP is open. This way a team rep will be able to transfer ALL of the services and activities, not just one or two at a time.

Instead of using the lookup button next to the attending building on the Family page, you will want to use the look up button next to attending district:



This will generate an "Attending District Change Request" as shown below:



Now, if the child is transferred while an IEP is open, the staff that were assigned on the F page (and aren't included on the transfer request) will lose access to the IEP once the request is processed. If the staff that lost access still need access, this can easily be solved by having the staff added as a potential service provider. This can be done by a team rep or if the staff member has the Add/Transfer button permissions set up.