



**Early Learning
Coalition**
OF PINELLAS COUNTY

DEPARTMENT: Eligibility	SUBJECT: Procedures for “ How to key Transfers ”
REVISED: 11-21	AUTHORIZATION APPROVAL: Manager, Family Services

Transfers is a standard process to allow clients the opportunity to transfer their School Readiness scholarship from one provider to another.

Before keying the transfer, co-pays must be verified with either a completed Transfer form or current and verifiable receipts from the existing childcare provider. The current childcare provider will sign the Transfer form to verify that Co-payments are paid. The new childcare provider must sign with the agreed upon start date.

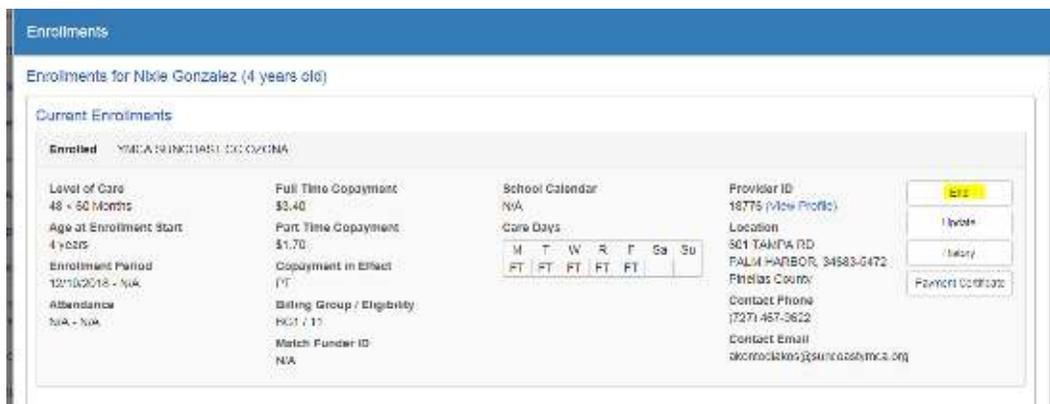
Process:

1. End the current provider enrollment. The current enrollment will end the day before the “Child’s Start Date” on the transfer form.

THIS BOX TO BE COMPLETED BY NEW PROVIDER ONLY

NEW PROVIDER’S NAME <i>(Required – Please Print)</i>	Growing Room
CHILD’S START DATE <i>(Required)</i>	5/30/19
NEW PROVIDER’S STAFF SIGNATURE	

- a. Locate the child listed on the transfer form in MOD and click on their **Enrollments** button.
- b. Under **Current Enrollments**, click End on the right.



- c. Terminate child's previous enrollment:
 - i. **End Enrollment Reason:** PT-PROVIDER TRANSFER
 - ii. **Last Day of Service:** Day before the "Child's Start Date" on the transfer form.
 - iii. **Is there a past due parent fee?:** No
 - iv. Save

- d. Click Acknowledge button if it appears.
- 2. Start the enrollment with the new provider. The new enrollment will start on the date listed under "Child's Start Date" as long as the transfer form is received on or before the "Child's Start Date".

THIS BOX TO BE COMPLETED BY NEW PROVIDER ONLY

NEW PROVIDER'S NAME (Required - Please Print)	Growing Room
CHILD'S START DATE (Required)	5/30/19

- a. Remain on the **Enrollments** screen. Click Add Enrollment... at the bottom of the screen.

- b. Use the Search button to locate the New Provider.

Details of Selected Childcare Provider		
Name	Provider ID	Hours of Business
GROWING ROOM ENRICHMENT CENTER	5710	M T 6:30am 6:30pm

5. Enter Case Note:
 - a. **Description:** Miscellaneous
 - b. **Custom Code Type:** Parent
 - c. **Custom Code:** TRANSFER
 - d. **Note:** Indicate the start date, the child(ren)'s names, effective date and site. Notate fees were paid per signed transfer form. Client will sign payment cert for client and provider records.
 - e. **Save.**

Transfer Tips:

1. If the receipt date of the transfer form in the history notes is 5/14/19 but the “Child’s Start Date” on the transfer form is 5/5/19, key the start date for 5/14/19. We cannot backdate transfers if it was received after the child started.
2. Please be careful when transferring children. If the transfer date comes before the enrollment date, that means an upcoming recert or fee change has been keyed prior to the transfer form submission. For example, if you go to key a 5/31/19 transfer date and see the following screen:

Do not close this enrollment out 5/30/19 and continue to key your transfer as normal. You will actually negate this enrollment by doing so. You will need to cancel the enrollment tied to the recert or fee change. Then, process the transfer. Finally, re-key the enrollment reflecting the recert or fee change. Ensure that fees are pulling correctly for each of these enrollments. The client must sign off on all payment certificates.

- ✓ **Basic rule of thumb: If you are about to key an end date prior the start date, this is an indicator/red flag that there is an issue in the file.**

3. If you run into one and the *BG1 assignment* has expired, please stretch out the BG1 assignment beyond the “Child’s Start Date”. (Example: Child’s start date is 5/30/19— Stretch out elig assignment end date to 5/31/19). Please send an email to the case manager to let them know you had to extend the assignment dates in order to process the transfer.
4. Transfers for families under "Pending Update-Redetermination" (Families who are due within the next 45 days and have not submitted their wizard yet.):
 - a. **Change Household Status** to Active.
 - b. Follow normal Transfer procedures.
 - c. NOTE: For families under “Rejection,” please “Reject” the wizard back to the family using the same verbiage from the original rejection.
 - d. Call client if recertification is within 30 days to remind them of upcoming deadline. Add to Transfer case note that reminder was given to client.
 - e. The next day, make sure the system put it back under "Pending Update". Email for help if it did not switch.
5. Please remember there are certain occasions where a child may have a special schedule. The Enrollment Schedule Note from the previous enrollment must be reviewed.

Level of Care In School	Full Time Copayment \$2.50	School Calendar N/A	Calendar Applied
Age at Enrollment Start 0 years	Part Time Copayment \$1.00	Care Days M T W R Sa Su FT FT FT FT FT	
Enrollment Period 12/01/2021 - N/A	Copayment in Effect PT	Enrollment Schedule Note Check Enrollment Schedule Notes for any special schedules	
Attendance 12/01/2021 - N/A	Billing Group / Eligibility UG0 / LCUN		
	Match Funder ID 1202 (26-26-26, RCR 0% Match)		

- a. A preschool child may be authorized for PT care ONLY. When transferring the child, you will have to key the PT schedule in the enrollment screen as well.
 - ✓ If you key a screen that looks like this, note the discrepancies, which should raise a **red flag**:

Pending Family Acceptance MAIN STREET EARLY LEARNING CENTER			
Level of Care 36 - 48 Months	Full Time Copayment \$1.20	School Calendar N/A	Calendar Applied
Age at Enrollment Start 3 years	Part Time Copayment \$0.60	Care Days M T W R F Sa Su PT PT PT PT PT	
Enrollment Period 12/01/2021 - N/A	Copayment in Effect PT	Enrollment Schedule Note N/A	
Attendance 12/01/2021 - N/A	Billing Group / Eligibility RCR / PCUN		
	Match Funder ID 1202 (26-26-26, UG0 0% Match)		

- ✓ Review the notes to see if the child is truly only eligible for PT care. If so, the enrollment should look like this *with* an appropriate Enrollment Schedule Note:

Pending Family Acceptance MAIN STREET FAMILY LEARNING CENTER			
Level of Care 36 - 48 Months	Full Time Copayment \$1.20	School Calendar N/A	Calendar Applied
Age at Enrollment Start 3 years	Part Time Copayment \$0.60	Care Days M T W R F Sa Su PT PT PT PT PT	
Enrollment Period 12/01/2021 - N/A	Copayment in Effect PT	Enrollment Schedule Note Client is authorized for PT care ONLY	
Attendance 12/01/2021 - N/A	Billing Group / Eligibility UG0 / LCUN		
	Match Funder ID 1202 (26-26-26, RCR 0% Match)		

- b. A child may be approved for a Special Enrollment Schedule based on the client's eligibility needs.
 - ✓ When transferring a child already approved for a Special Enrollment Schedule to another in-home provider, contact the client to see if the schedule is still needed.
 - ✓ Reference "Process for Special Enrollment Schedules" in order to key.
- 6. When transferring a Kindergartner, ensure that the Level of Care, Copay in Effect and Calendar are correct once enrollment is keyed.

Pending Family Acceptance YWCA SACO PROG MAXIMO FIRM

Level of Care In School	Full Time Copayment \$2.50	School Calendar 118 - PCSB - School Age	Calendar Applied
Age at Enrollment Start 3 Years	Part Time Copayment \$1.00	School Holiday Unit of Care 1	
Enrollment Period 08/11/2021 - N/A	Copayment in Effect PT	Care Days	
Attendance N/A - N/A	Billing Group / Eligibility USG / LCON	M T W Th F Sa Su	
	Match Funder ID 1202 (25-25-25, RC2 0% Match)	P P P P P	
		Enrollment Schedule Note N/A	

- ✓ If there is any discrepancies, follow "Kindergarten School Age Flip" instructions.

Note: The information listed in these guidelines are not all inclusive and staff are responsible for ensuring that all applicable rules, policies and procedures are adhered to in the execution of their duties and responsibilities as it relates to their position. These guidelines can be modified and exceptions may be made upon justification within program policy and with management approval. This procedure will be reviewed periodically or as needed for updates or revisions as approved by management.