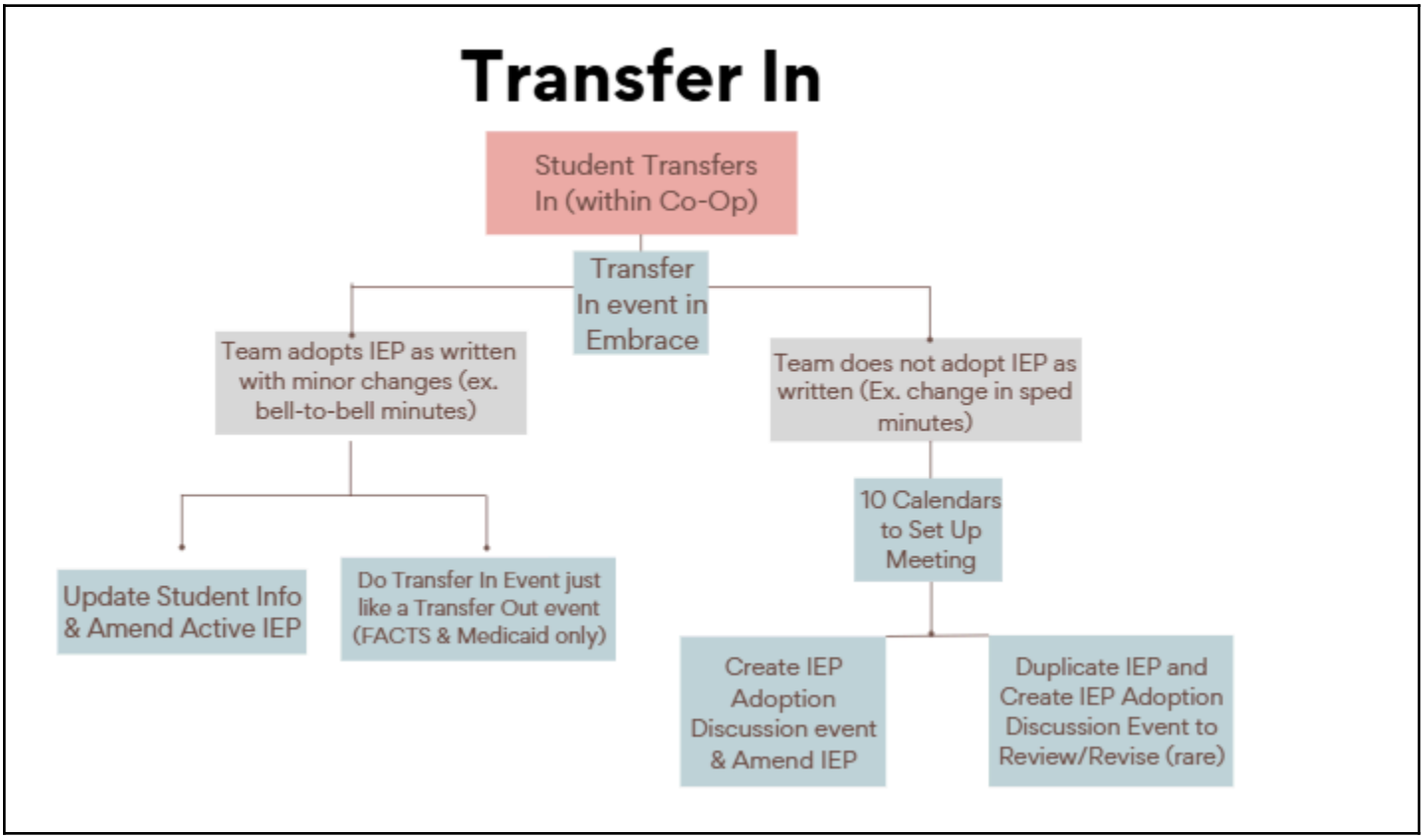
BHASED Procedures

Transfer In/Transfer Out



Transfer Out Event = The last date of student enrollment in the sending district once the request for records was received from the receiving district

Transfer In Event = The first date of student enrollment in the receiving district after the transfer out event date created by the sending district

IEP Adoption Discussion = A formal IEP meeting where the IEP team determines if they will adopt the current IEP of a student that has transferred into their school district.

TRANSFER IN: District Does Adopt IEP (IEP is in Embrace)

Transfer In Event

1. Email your Special Education Coordinator to transfer student to your district.
2. The receiving school decides ***to adopt the student's IEP as written*** so a IEP Adoption meeting is ***not needed***.
3. Open up the Student Information and check/update the following information:
    - Annual IEP dates
    - Special Education Eligibility
    - Grade
    - Current **and** next school year
    - Home School
    - Serving School
    - Student/Parent Demographic
4. Create a New Event- "Transfer In"
    a. **Date the Event the date the student enrolled in the district**
    b. Click the "x" at the top right of the box selecting NO FORMS
        i. May add Additional Notes if needed (required for BHASED programs) to document mobility
5. FACTS Page
    a. Click on PRINT FORMS and then Student Tracking/FACTS form
    b. Click "New Student" at top
    c. Click the blue tab entitled "Enrollment Tracking"
    d. Update the Date, select "Action", select "Reason"
        i. Example for Transferring from one district to another:
            1. Action: Enrolled in District, Reason: Enrolled, List your district as the "Receiving District'
    d. Ensure that the date matches the actual enrollment date
    e. Click Save.
6. Submit event.

After Decision to Adopt Active IEP: choose an option (see subheadings)…

1. Option 1: Amend the Active IEP
2. Option 2: Duplicate the Active IEP

TRANSFER IN: District Does Adopt IEP (IEP is in Embrace)

After Decision to Adopt Active IEP: OPTION #1: Amending the Active IEP

1. Amend Active IEP and include on the Amendment
    a. Any changes within the IEP
    b. First day of attendance
2. Add forms that need to be changed.
    a. Consent to Bill Medicaid
        i. Obtain parent signature
        ii. Upload and update in Student Info
3. Update Services & Placement page(s) to reflect:
    a. Start Date is first day of attendance
    b. Update the dates for related services to match Start Date
    c. Refresh the top of the page to carry over the new serving school
    d. Check for accuracy on instructional minutes and bell to bell minutes
    e. The school must implement services comparable to those contained in the transferring in IEP.
4. Submit amendment.
5. ***Ask District User with Admin Access to unlock IEP and do the following:***
    a. Refresh Conference Summary page and Save
    b. Click on PRINT FORMS and then Student Tracking/FACTS form
    c. Refresh FACTS page and Save
6. Submit IEP
7. ***Ask District User with Admin Access to lock IEP***
8. Follow protocol to inform your building personnel.

TRANSFER IN: District Does Adopt IEP (IEP is in Embrace)

After Decision to Adopt Active IEP: OPTION #2: Duplicating the Active IEP

1. ***Ask District User with Admin Access to*** duplicate the Active IEP
2. Update any changes within the IEP the team agrees upon
3. Update Services & Placement page(s) to reflect:
    a. Start Date is first day of attendance
    b. Update the dates for related services to match Start Date
    c. Refresh the top of the page to carry over the new serving school
    d. Check for accuracy on instructional minutes and bell to bell minutes
    e. The school must implement services comparable to those contained in the transferring in IEP.
4. Add Consent to Bill Medicaid form
    a. Obtain parent signature
    b. Upload and update in Student Info
5. Refresh Conference Summary page and Save
6. Click on PRINT FORMS and then Student Tracking/FACTS form
7. Refresh FACTS page so there's a checkmark ✅and Save
8. Submit IEP
9. Follow protocol to inform your building personnel.

TRANSFER IN: District Does Not Adopt IEP (IEP is in Embrace)

Transfer In Event

1. Email your Special Education Coordinator to transfer student to your district.
2. The receiving school decides ***not to adopt the student's IEP as written*** so an IEP Adoption meeting is scheduled as required. This would mean minor changes need to be made to the IEP. It would be extremely rare that an IEP team would propose major changes to an IEP (for example, a change in placement) without data in the new district to support this. If that is the case, an IEP Review/Revision would be required instead of an amendment. *See your BHASED Coordinator for advice on this type of situation.*
3. Open up the Student Information and check/update the following information:
   - Annual IEP dates
   - Special Education Eligibility
   - Grade
   - Current **and** next school year
   - Home School
   - Serving School
   - Student/Parent Demographic
4. Create a New Event- "Transfer In"
   a. **Date the Event the date the student enrolled in the district**
   b. Click the "x" at the top right of the box selecting NO FORMS
      i. May add Additional Notes if needed (required for BHASED programs) to document mobility
5. FACTS Page
   a. Click on PRINT FORMS and then Student Tracking/FACTS form
   b. Click "New Student" at top
   c. Click the blue tab entitled "Enrollment Tracking"
   d. Update the Date, select "Action", select "Reason"
      i. Example for Transferring from one district to another:
         1. Action: Enrolled in District, Reason: Enrolled, List your district as the "Receiving District'
   d. Ensure that the date matches the actual enrollment date
   e. Click Save.
6. Submit event.

After Decision Not to Adopt Active IEP

1. Amend Active IEP and include on the Amendment
   a. Any changes within the IEP
   b. First day of attendance
   c. Add forms that need to be changed.
      i. Consent to Bill Medicaid
         1. Obtain parent signature
         2. Upload and update in Student Info
2. Update Services & Placement page(s) to reflect:

a. Start Date is first day of attendance
b. Update the dates for related services to match Start Date
c. Refresh the top of the page to carry over the new serving school
    i. Check for accuracy on instructional minutes and bell to bell minutes
    ii. The school must implement services comparable to those contained in the former IEP.
d. Submit amendment

3. ***Ask District User with Admin Access to unlock IEP and do the following:***
    a. Refresh Conference Summary page and Save
    b. Click on PRINT FORMS and then Student Tracking/FACTS form
    c. Refresh FACTS page and Save
4. Submit IEP
5. ***Ask District User with Admin Access to lock IEP***
6. FACTS Page
    a. Click on PRINT FORMS and then Student Tracking/FACTS form
    b. Click “New Student” at top
    c. Click the blue tab entitled “Enrollment Tracking”
    d. Update the Date, select “Action”, select “Reason”
        i. Example for Transferring from one district to another:
            1. Action: Enrolled in District, Reason: Enrolled, List your district as the “Receiving District’
    e. Ensure that the date matches the actual enrollment date
    f. Click Save.
7. Submit event

TRANSFER IN: IEP is not in Embrace

1. Email your Special Education Coordinator with student's full name, DOB, and SIS number to search for student and add
2. Create a meeting event & choose "Transfer-In"
    a. **Transfer-In event date should be the first day of student enrollment in the receiving district**
3. Upload IEP from the previous school district to this event.
4. Include the following forms:
    a. Notification of Conference
    b. Summary of Conference
    c. Goals and Objectives
    d. Accommodations
    e. Assessment
    f. Service and Placement page(s) (only from date of Transfer In to date annual review is due)
    g. Conference Recommendations
    h. Additional Notes
        i. **Add**: Date student officially enrolled in the district, first day of attendance, and whether or not the IEP dated _____ will be adopted as written or if changes were needed: (i.e. bell to bell minutes, instructional minutes, minutes for Special Education classes, related service minutes, etc.)
    i. Consent to Bill Medicaid
        i. Obtain parent signature
        ii. Upload and update in Student Info
5. Fill out the forms listed above using the information on the transferring IEP.
6. FACTS Page
    a. Click on PRINT FORMS and then Student Tracking/FACTS form
    b. Click "New Student" at top
    c. Click the blue tab entitled "Enrollment Tracking"
    d. Update the Date, select "Action", select "Reason"
        i. Example for Transferring from one district to another:
            1. Action: Enrolled in District, Reason: Enrolled, List your district as the "Receiving District'
    e. **Ensure that the date matches the actual enrollment date**
    f. Click Save.
7. Upload all signatures to the appropriate location.
8. On the Conference Summary page, import placement from the new Services and Placement page and refresh.
9. Provide a copy to the parents.
10. Submit event.
11. Click Active IEP.
12. Follow protocol to inform your building personnel.

TRANSFER OUT: Students Move Out of District

Transfer Out event in Embrace is created by sending district once records are requested from receiving district.

BHASED Coordinator must be notified once the transfer-out event is complete. The BHASED Coordinator will complete the transfer of records request in Embrace to give the receiving district access.

- Create a New Event- “Transfer Out”
  - **Date the Event the date the student is withdrawn from the home district**
  - Click the “x” at the top right of the box selecting NO FORMS
    - May add Additional Notes if needed (required for BHASED programs) to document mobility
- FACTS Page
  a. Click on PRINT FORMS and then Student Tracking/FACTS form
  b. Click “Moved From District” at top
  c. Click the blue tab entitled “Enrollment Tracking” in the student’s profile in Embrace
  d. Update the Date, select “Action”, select “Reason”
     i. Action: Exit from District, Reason: Transfer Out
  e. Ensure that the date matches the actual withdrawal date from your District.
  f. Click Save.
- Submit event.
- Follow protocol to inform your building personnel.

TRANSFER OUT: Students in BHASED Programs who Move Districts

Transfer Out event in Embrace is created by sending district once records are requested from receiving district.

BHASED Coordinator must be notified once the transfer-out event is complete. The BHASED Coordinator will complete the transfer of records request in Embrace to give the receiving district access.

- Create a New Event- "Transfer Out"
  - **Date the Event the date the student is withdrawn from the sending district**
  - Click the "x" at the top right of the box selecting NO FORMS
    - On Additional Notes:
      - Exact end date of services from sending district
      - Name of the district the student is moving to if known
- FACTS Page
  a. Click on PRINT FORMS and then Student Tracking/FACTS form
  b. Click "Moved From District" at top
  c. Click the blue tab entitled "Enrollment Tracking" in the student's profile in Embrace
  d. Update the Date, select "Action", select "Reason"
     i. Action: Exit from District, Reason: Transfer Out
  e. Ensure that the date matches the actual withdrawal date from your District.
  f. Click Save.
- Submit event.
- Follow protocol to inform your building personnel.

TRANSFER IN: Students in BHASED Programs who Move Districts within the Coop

Transfer In process is initiated once the sending district verifies a records request and completes a Transfer Out event.

BHASED Coordinator for the Receiving District must be notified once the student registers. The BHASED Coordinator will complete a transfer of records request in Embrace to give the receiving district access.

Transfer In Event (completed by BHASED Program staff)

1. Open up the Student Information and check/update the following information:
   - Annual IEP dates
   - Special Education Eligibility
   - Grade
   - Current **and** next school year
   - Home School
   - Serving School
   - Student/Parent Demographic
2. Create a New Event- "Transfer In"
   - **Date the Event the date the student enrolled in the district. This should be the date AFTER the Transfer Out event.**
   - Click the "x" at the top right of the box selecting **NO FORMS**
     i. Add forms to event:
        1. Additional Notes
           a. required for BHASED programs to document mobility
        2. Consent to Bill Medicaid
           a. ask parent to sign, upload, and add date to Student Info
   - FACTS Page
     i. Click on PRINT FORMS and then Student Tracking/FACTS form
     ii. Click "New Student" at top
     iii. Click the blue tab entitled "Enrollment Tracking"
     iv. Update the Date, select "Action", select "Reason"
        1. Example for Transferring from one district to another:
           a. Action: Enrolled in District, Reason: Enrolled, List new district as the "Receiving District'
        2. **Ensure that the date matches the actual enrollment date**
     v. Click Save.
     vi. Submit event.

3. Amend Active IEP
   - Include on the Amendment form:
     i. Last day at sending district and first day at receiving district

- Update current Services & Placement page:
    i. End current placement page as last date of sending district
    ii. Ensure everything matches including dates of all related services.
- Add new Services and Placement page:
    i. Start date is first day with receiving district
    ii. Ensure everything matches including dates of all related services.
- Submit amendment.

4. ***Ask District User with Admin Access to unlock IEP and do the following:***
    - Refresh Conference Summary page and Save
    - Click on PRINT FORMS and then Student Tracking/FACTS form
    - Refresh FACTS page and Save
    - Submit IEP
5. ***Ask District User with Admin Access to lock IEP***

The receiving district may decide to observe the student at the BHASED program. Reach out to your BHASED Coordinator to set this up.

If the receiving district decides ***to adopt the student's IEP as written***, an IEP Adoption meeting is ***not needed***. If the receiving district decides that they may be able to program for the student, the district should refer to Transfer In (Does Not Adopt IEP) to set up an IEP meeting to review services and placement.