Date: November 20, 2018
To: First Steps System Points of Entry (SPOEs)
From: Maggie McCall, First Steps Quality Assurance Manager
Subject: Transferring Early Intervention (EI) Records between SPOEs

This memo is to provide clarification on the process for transferring a child's EI record between SPOEs.

Please contact Maggie McCall, First Steps Quality Assurance Manager, with questions: Maggie.McCall@fssa.in.gov.

Transferring EI Records

Scenario 1: Child is referred to SPOE 2 after having EI record closed in SPOE 1.

1. SPOE 2 calls SPOE 1 to ask for electronic transfer of child's record in iSPOE and a copy of the child's file.
2. SPOE 1 completes the electronic transfer in iSPOE as soon as possible.
3. SPOE 1 mails a copy of the child's file to SPOE 2 as soon as possible.

Scenario 2: Child has active status in SPOE 1 then moves to SPOE 2. (Planned Move)

1. SPOE 1 calls SPOE 2 to make aware of electronic transfer of child's record in iSPOE and mailed copy of child's record.
    a. SPOE 1 completes the electronic transfer in iSPOE as soon as possible.
    b. SPOE 1 mails a copy of the child's file to SPOE 2 as soon as possible.
2. SPOE 2 assigns Service Coordinator (SC).
3. SC contacts family to make necessary adjustments to IFSP.

Scenario 3: Child has active status in SPOE 1 then moves to SPOE 2. (Unplanned Move)

1. SPOE 2 calls SPOE 1 to ask for electronic transfer of child's record in iSPOE and a copy of the child's file.
2. SPOE 2 assigns Service Coordinator (SC).
3. SC contacts family to make necessary adjustments to IFSP.