

# 2023 File Transfer Procedures: Preschool, Resource K-12 and Special Programs

This document addresses the transfer of files from Pre-School to KG, 6th to 7th; 9th to 10th; 12th to transition programs. These guidelines include files for students in special programs (i.e. ASC, EE, SB, BCIS) that will be transferred to a new school location. These guidelines do not apply to files where a change of placement to a more restrictive placement (self-contained classroom) is team decision.

## 1. Role of TCMs

- Review all files that will transfer between Special Programs, Preschool, 6th, 9th and if appropriate 12th grades. Complete a TCM Compliance Checklist for each file.
  - The checklist is kept outside of the special education record and transferred to the receiving school for their review.
  - The receiving school can destroy these after the corrections have been verified.
- Train and assist paperwork assistants in file management in the sending, receiving, and daily management of files.

## 2. Role of Sending Team (all Special Education Professionals involved in file transfers)

- Ensure each student has a current IEP which will not expire before November 1 of the next school year. This deadline is **applicable for all transferring students**, including those students transferring to the post-high programs housed at the Vista Education campus.
- Complete the transition plan for all students turning 14 in the IEP year.
- Ensure that evaluation and student eligibility are current and that the eligibility is not due before November 1st of the next school year (for students who will transfer to a new setting).
- **Ensure that all open forms are finalized on myIDEA!**
- Review TCM File Compliance Checklist and correct all errors.
- Align the student's IEP services, placement, and proposed schedule. (See the **New 6 + 1\* Compliance Reasons to Return a File**).
  - Complete change of placement indicating start date of next year if appropriate.

Transfer **ALL** files (active and inactive) to the receiving school **no later than the last Friday in April of the current School Year. For the 2022-2023 school year, this is Friday, April 21, 2023.** TCMs will be reviewing all transferring student files by April 21, 2023 regardless of education programs (ASC, EE, SB, BCIS, Speech [only])

- **The receiving school should return any files that require corrections by May 5, 2023.** Corrections are to be made and file returned by **May 19, 2023** (See list of "Reasons to Return a File").  
*Please note, these timelines differ for Special Programs ASC, EE, SB, BCIS whom hold their file fair on May 12<sup>th</sup>, 2023.*
  - Progress reports that haven't been completed can be sent via Pony to the receiving school after they're done.
  - Year-round elementary schools need to follow this date because junior high teams need to review the files. Year-round schools can still access records on myIDEA.
- Complete a File Transfer Log with a list of names indicating the active and inactive files being transferred. Keep one copy for your records and provide the receiving school a copy.
- **A Note for Special Programs Teachers:** Avoid involving the anticipated self-contained teacher. Sharing teacher names with parents and suggesting specific schools creates parental expectations for student placement that may not be fulfilled.

## 3. Role of the Receiving Team (all Special Education Professionals involved in file receipt)

1. Review the School to School Transfer Form and the student files for compliance.
2. Receiving school can return ACTIVE files that require corrections within 10 contract days of date of receipt (See the **New 6 + 1\* Compliance Reasons to Return a File**).
3. If there is a question regarding the file compliance, contact your TCM.
4. Corrections must be made and file returned by **May 19, 2023.**

**Deliver files to SPECIAL EDUCATION DEPARTMENT PERSONNEL ONLY - not school custodian, office staff/secretaries.**