



**COUNTY OF SAN BERNARDINO  
PRESCHOOL SERVICES  
DEPARTMENT  
POLICY**

**NO. 01      ISSUE 2**  
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**EFFECTIVE: 03-09-15**  
Updated

**SUBJECT:**  
**Transfer of Enrollment Application, Family Data, and or/  
Child Data Files**

**APPROVED: 03-09-15**  
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**BY: Diana Alexander, Director**

**PURPOSE**

To ensure a seamless process for the transition of enrollment applications, child data files, and family data files from one site to another when a verbal or written request has been received from a parent or guardian.

**POLICY**

Due to county confidentiality policies and procedures relative to Personally Identifiable Information (PII); enrollment applications, family data, and child data files are not to be forwarded via U.S. mail, courier, or county interoffice mail under any circumstances. All files will be hand delivered by Program Supervisors or Site Supervisors between area locations to ensure secure and confidential delivery.

**REFERENCE**

Head Start Performance Standards 1304.51(g)

**PROCEDURE**

When a parent request has been received for a child's transfer from one site to another, the child's file and/or family file must be received by the desired site within one week. A transfer may only occur when an enrollment vacancy is available at the desired site.

Generalists will:

- Terminate the child at the current site in the COPA database.
- Make a copy of the following forms to be retained at the family's previous site location:
  - Enrollment Application
  - Document Intake Form DIF (indicate on the DIF the date of transfer and new site location)
  - Family income source
  - Proof of Birth
  - Copies of the forms will be retained in the "dropped" file at the previous site location
- Hand deliver the "transfer file" that includes the original enrollment application, family data file, and/or child data file to his or her immediate supervisor (Program Supervisor). In the absence of the immediate supervisor, the documentation is to be hand delivered to the Site Supervisor of the current site.

- Document in the Child Case notes in COPA the name of the supervisor that the documentation was handed to and where the final destination of the documentation will be.

Transporting Program Supervisor or Site Supervisor will:

- Upon receipt of a file from the Generalist, input in Child Case notes in COPA that the documentation was received and where the final destination of the documentation will be.
- At the time of transfer to an appropriate supervisor, input into Child Case notes in COPA the date, time, destination, and the name of the individual the documentation was hand delivered to.

Receiving Site Supervisor will:

- Upon receiving the documentation, input into Child Case notes in COPA the date, time, and name of supervisor that delivered the documentation.
- At the time that the documentation is provided to the Generalist, input in Child Case notes in COPA the name of the individual that it was hand delivered to.