

Instructions for Discretionary Transfers
(Month & Year)

The donor grantee must enter a break end date in any open break records(s). If a participant is still on break at the time of the transfer, the break end date should be the day before the effective date of the transfer.

If the end date of the most recent assignment is more than three days before the transfer effective date, the donor grantee must enter a break from the day after the most recent assignment end date through the day before the transfer effective date.

The donor grantee must enter the transfer(s) into the Transfer Utility.

The donor grantee must send an e-mail request to SCSEP Help at (support@scsephelp.zendesk.com) with a copy to the recipient grantee's authorized signatory, identifying all the transfers that it wishes to make. If the recipient grantee's authorized signatory does not have a role of grantee administrator in SPARQ, someone with a role of grantee administrator must also be copied.

The donor must include the Discretionary Transfer Request with its e-mail, with all requests organized by recipient grantee. For each request, the donor must indicate on the document whether the transfer is at the initiative of the participant (for example, the participant is moving) or by the grantee for administrative reasons (for example, the grantee is significantly over-enrolled in the county in which the participant resides).

The request e-mail must state that the recipient grantee agrees to the transfer.

The request e-mail must state that the recipient grantee is authorized to serve in the counties where the participants to be transferred reside.

If the transfer request is initiated by the grantee for administrative reasons, the request e-mail must state that the transferred participant will receive: timely notice and explanation, the right of first refusal for 90 days, and the application of the more liberal of the two grantees' IDL policy for 90 days.

The request e-mail should have a subject line starting with "Discretionary Transfer." Grantees can add anything they like after those words.

Discretionary Transfer Requests

Donor Grantee:

Participant Last Name	PID	Durational Limit Date	County of Residence before transfer	County of Residence after transfer	State	Recipient Grantee	Recipient Sub-grantee	Effective Date of Transfer	Initiated by: Participant / Grantee	Comments
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