


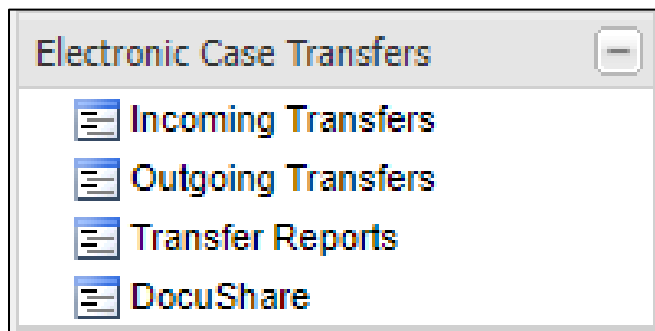
# Electronic Case Transfers (ECT)

Cases can be automatically be transferred from one Regional Center to another using the **Electronic Case Transfers (ECT)** feature.

If a case does not exist at the receiving regional center, the UCI's Primary Record, CDER, SIRs, and case notes will be transferred automatically once the receiving regional center accepts the case.

If a case already exists at the receiving regional center, an email can be automatically created to notify the receiving center of the pending change.

To begin, find the Electronic Case Transfers group within the Navigation menu. Click on the  icon to reveal the available options.



## Incoming Transfers

Clicking on **Incoming Transfers** will display all transfers sent to a regional center (RC). By default, it will display all requests that are in **Submitted** or **Confirmed** status.



The screenshot shows a table titled "Incoming Transfers" with the following data:

UCI#	Name	Age	Status	Entered	IRCT Effective
6839093			SUBMITTED---CENTRAL VALLEY	02/28/2022	03/01/2022
7351875			SUBMITTED---EASTERN LOS ANGELE	02/28/2022	03/01/2022
6669165			SUBMITTED---TRI-COUNTIES	02/25/2022	02/26/2022
6945804			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
6488105			SUBMITTED---HARBOR	02/22/2022	02/23/2022
6018204			SUBMITTED---FRANK D. LANTERMAN	02/16/2022	02/17/2022
7142635			SUBMITTED---NORTH BAY	02/09/2022	02/10/2022
7339650			SUBMITTED---EASTERN LOS ANGELE	02/03/2022	02/04/2022
6463421			SUBMITTED---ALTA CALIFORNIA	02/01/2022	02/02/2022
6809655			CONFIRMED---ORANGE COUNTY	01/27/2022	02/28/2022
8314490			SUBMITTED---ALTA CALIFORNIA	01/24/2022	01/25/2022
7326236			CONFIRMED---HARBOR	01/18/2022	02/28/2022
6046724			SUBMITTED---FRANK D. LANTERMAN	11/16/2021	11/17/2021

Right-click on a record to view the available options, **View** and **Work With**.

Selecting **View** will display the request in **View-Only** mode.

The screenshot shows a window titled "Display Incoming Transfer Request" for "SAN DIEGO Regional Center". It displays client information (UCI# 6669165, Name, Birthdate, Age) and transfer details (Case Transfer From RC: 366, TRI-COUNTIES, IRCT Effective Date: 02/26/2022, Shared Case: N, Not Shared, Open Case to, Open to Status, Open to Caseload). An "In Process Comment" field contains the text "Transfer Request is in Submitted Status".

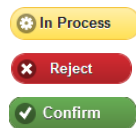
If selecting **Work With**, the request will be in **Edit** mode and allow changes to the request.

Comments can be entered as well as changes to **Status** and **Caseload**.

Click **Previous** to return to the previous window or to exit the program.

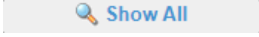
The screenshot shows a window titled "Work with Incoming Transfer Request" for "SAN DIEGO Regional Center". It displays client information (UCI# 6839093, Name, Birthdate, Age) and transfer details (Case Transfer From RC: 367, CENTRAL VALLEY, IRCT Effective Date: 03/01/2022, Shared Case: N, Not Shared, Open Case to, Open to Status, Open to Caseload). An "In Process Comment" field contains the text "Transfer Request is in Submitted Status".

There are options located in the top-right corner of the window to change the status of the request.



Clicking on any option will automatically generate an email that can be sent to the other RC.

This screenshot is similar to the previous one but includes a top navigation bar with buttons: "Previous" (blue), "In Process" (yellow), "Reject" (red), "Confirm" (green), and "Exit" (grey). The main content area is the same as the previous screenshot.

Click on  to display a list of all requests that have been received which contains requests in **Processed, Cancelled, Rejected, or Cancel/Already Entered.**

**Incoming Transfers**

UCI#	Name	Age	Status	Entered	IRCT Effective
6588260			SUBMITTED---EAST BAY	03/03/2022	03/04/2022
8418394			SUBMITTED---INLAND COUNTIES	03/03/2022	03/04/2022
6859453			SUBMITTED---ORANGE COUNTY	03/03/2022	03/04/2022
8291585			CONFIRMED---INLAND COUNTIES	03/02/2022	03/03/2022
6945206			SUBMITTED---INLAND COUNTIES	03/01/2022	03/02/2022
8142314			SUBMITTED---SAN ANDREAS	02/28/2022	03/01/2022
8182952			SUBMITTED---SAN ANDREAS	02/28/2022	03/01/2022
6945804			PROCESSED---INLAND COUNTIES	02/28/2022	03/03/2022
6839093			PROCESSED---CENTRAL VALLEY	02/28/2022	03/03/2022
7351875			SUBMITTED---EASTERN LOS ANGELE	02/28/2022	03/01/2022
6669165			SUBMITTED---TRI-COUNTIES	02/25/2022	02/26/2022
6945804			CANCELLED---INLAND COUNTIES	02/22/2022	02/23/2022
6488105			SUBMITTED---HARBOR	02/22/2022	02/23/2022
6018204			SUBMITTED---FRANK D. LANTERMAN	02/16/2022	02/17/2022
7142635			SUBMITTED---NORTH BAY	02/09/2022	02/10/2022
7339650			SUBMITTED---EASTERN LOS ANGELE	02/03/2022	02/04/2022
6463421			SUBMITTED---ALTA CALIFORNIA	02/01/2022	02/02/2022
7551551			PROCESSED---HARBOR	02/01/2022	02/01/2022
6048058			PROCESSED---FRANK D. LANTERMAN	01/31/2022	01/31/2022

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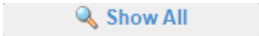
### Outgoing Transfers

Clicking on **Outgoing Transfers** will display all transfers sent by a regional center (RC). By default, it will display all requests that are in **Submitted** or **Confirmed** status.

**Outgoing Transfers**

UCI#	Name	Age	Status	Entered	IRCT Effective
8626233			SUBMITTED---FAR NORTHERN	03/03/2022	03/04/2022
6290749			SUBMITTED---SAN ANDREAS	03/03/2022	03/04/2022
8615429			SUBMITTED---CENTRAL VALLEY	02/23/2022	02/24/2022
8630134			SUBMITTED---CENTRAL VALLEY	02/23/2022	02/24/2022
6271262			SUBMITTED---INLAND COUNTIES	02/23/2022	02/24/2022
6223794			SUBMITTED---ALTA CALIFORNIA	02/22/2022	02/23/2022
6285900			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
8237502			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
8207456			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
8184750			SUBMITTED---INLAND COUNTIES	02/11/2022	02/12/2022
7142346			SUBMITTED---INLAND COUNTIES	02/11/2022	02/12/2022
6454997			SUBMITTED---INLAND COUNTIES	02/11/2022	02/12/2022
7124787			SUBMITTED---CENTRAL VALLEY	02/09/2022	02/10/2022
8248816			SUBMITTED---INLAND COUNTIES	02/04/2022	02/05/2022
8276634			SUBMITTED---INLAND COUNTIES	02/04/2022	02/05/2022
6299658			SUBMITTED---EASTERN LOS ANGELE	02/03/2022	02/04/2022
8163104			SUBMITTED---INLAND COUNTIES	02/01/2022	02/02/2022
6291407			SUBMITTED---SAN ANDREAS	01/31/2022	02/01/2022
8207719			SUBMITTED---INLAND COUNTIES	01/31/2022	02/01/2022

[Export to Excel](#)

Click on  to display a list of all requests that have been received which contains requests in **Processed, Cancelled, Rejected, or Cancel/Already Entered.**

**Outgoing Transfers**

UCI#	Name	Age	Status	Entered	IRCT Effective
8626233			SUBMITTED---FAR NORTHERN	03/03/2022	03/04/2022
6290749			SUBMITTED---SAN ANDREAS	03/03/2022	03/04/2022
8615429			SUBMITTED---CENTRAL VALLEY	02/23/2022	02/24/2022
8630134			SUBMITTED---CENTRAL VALLEY	02/23/2022	02/24/2022
6271262			SUBMITTED---INLAND COUNTIES	02/23/2022	02/24/2022
6223794			SUBMITTED---ALTA CALIFORNIA	02/22/2022	02/23/2022
6285900			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
8237502			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
8207456			SUBMITTED---INLAND COUNTIES	02/22/2022	02/23/2022
6247814			PROCESSED---INLAND COUNTIES	02/22/2022	02/28/2022
8619893			PROCESSED---INLAND COUNTIES	02/15/2022	03/01/2022
8619869			PROCESSED---INLAND COUNTIES	02/15/2022	03/01/2022
8184750			SUBMITTED---INLAND COUNTIES	02/11/2022	02/12/2022
7142346			SUBMITTED---INLAND COUNTIES	02/11/2022	02/12/2022
6454997			SUBMITTED---INLAND COUNTIES	02/11/2022	02/12/2022
8220338			REJECTED---INLAND COUNTIES	02/11/2022	02/12/2022
6715280			REJECTED---CENTRAL VALLEY	02/11/2022	02/12/2022
8202310			PROCESSED---INLAND COUNTIES	02/10/2022	02/18/2022
8202248			PROCESSED---INLAND COUNTIES	02/10/2022	02/18/2022

[Export to Excel](#)


Similar to Incoming Transfers, a record can be opened by right-clicking and selecting **View** or **Work With**.

The screenshot shows the 'Display Outgoing Transfer Request' interface. At the top, it says 'My Regional Center: 362 SAN DIEGO'. Below this is a 'Client To Transfer Out' section with fields for UCI#: 8620223, Name: [REDACTED], Birthdate: [REDACTED], and Age: [REDACTED]. The 'Transfer Details' section includes: Case Transfer to RC: 363 FAR NORTHERN, IRCT Effective Date: 03/01/2022, Shared Case: Not shared, and 'If Not shared, close case information:' with 'Close to Case Status: #5 CLOSED TRANSFER' and 'Close to Caseload: 0000 CLOSED/INACTIVATED'. A note at the bottom states 'Transfer Request is in Submitted Status'.

## Create A New Request

Within the Outgoing Transfers screen, click on **Add Transfer** to create a new outgoing case transfer request.

The screenshot shows the 'Transfer Case to a Regional Center' interface. At the top, it says 'My Regional Center: 362 SAN DIEGO'. Below this is a 'Client To Transfer Out' section with fields for UCI#: [REDACTED], Name: [REDACTED], Birthdate: [REDACTED], and Age: 0. The 'Transfer Details' section includes: Case Transfer to RC: [REDACTED], IRCT Effective Date: 03/05/2022, Shared Case: NOT SHARED, and 'If Not shared, close case information:' with 'Close to Case Status: #5-CLOSED TRANSFER' and 'Close to Caseload: [REDACTED]'. There are search icons next to the UCI# and Caseload fields.

Enter the individual's UCI #. If needed, click on  to search by first or last name. The client's information will then be displayed below.

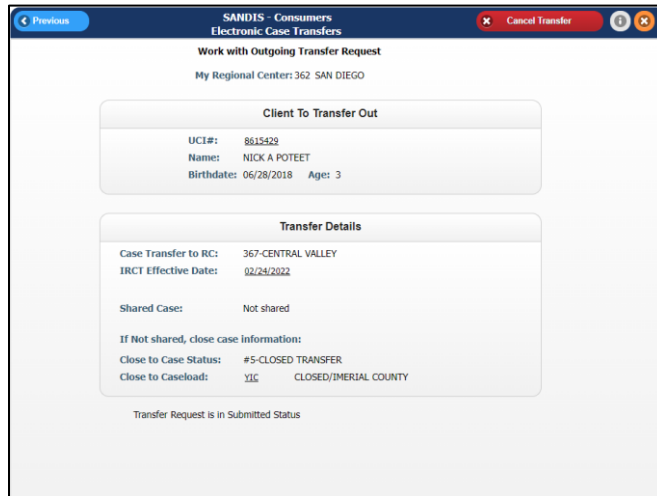
Select the appropriate RC and indicate whether the case will be shared. If the case is not shared, select the caseload to transfer the client to.

The screenshot shows the 'Transfer Case to a Regional Center' interface. At the top, it says 'My Regional Center: 362 SAN DIEGO'. Below this is a 'Client To Transfer Out' section with fields for UCI#: [REDACTED], Name: [REDACTED], Birthdate: [REDACTED], and Age: 0. The 'Transfer Details' section includes: Case Transfer to RC: [REDACTED], IRCT Effective Date: 03/01/2022, Shared Case: NOT SHARED, and 'If Not shared, close case information:' with 'Close to Case Status: #5-CLOSED TRANSFER' and 'Close to Caseload: [REDACTED]'. There are search icons next to the UCI# and Caseload fields.

## Cancel A Transfer Request

Open a record in edit mode by right-clicking the record and selecting **Work With**.

Click on **Cancel Transfer** to cancel the request. Doing so will automatically change the Status to Cancelled and present a prompt asking for any optional additional comments.



The screenshot shows a web application window titled "SANDIS - Consumers Electronic Case Transfers". The main heading is "Work with Outgoing Transfer Request" and it indicates "My Regional Center: 362 SAN DIEGO".

**Client To Transfer Out**

- UCI#: 8815429
- Name: NICK A POTEET
- Birthdate: 06/28/2018 Age: 3

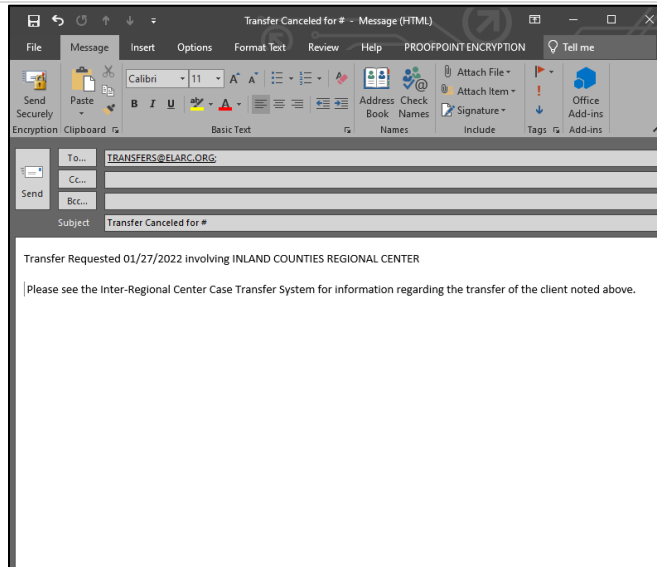
**Transfer Details**

- Case Transfer to RC: 367-CENTRAL VALLEY
- IRCT Effective Date: 02/24/2022
- Shared Case: Not shared
- If Not shared, close case information:
  - Close to Case Status: #5-CLOSED TRANSFER
  - Close to Caseload: YIC CLOSED/IMPERIAL COUNTY

Transfer Request is in Submitted Status

## Automatic Email Message

Depending on the RC and action taken, an email can be automatically created to be sent to the transfer coordinator of the sending or receiving center with a pre-generated message.



The screenshot shows an email client window titled "Transfer Canceled for # - Message (HTML)". The email content is as follows:

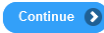
To: TRANSFERS@ELARC.ORG  
Cc: [Redacted]  
Bcc: [Redacted]  
Subject: Transfer Canceled for #

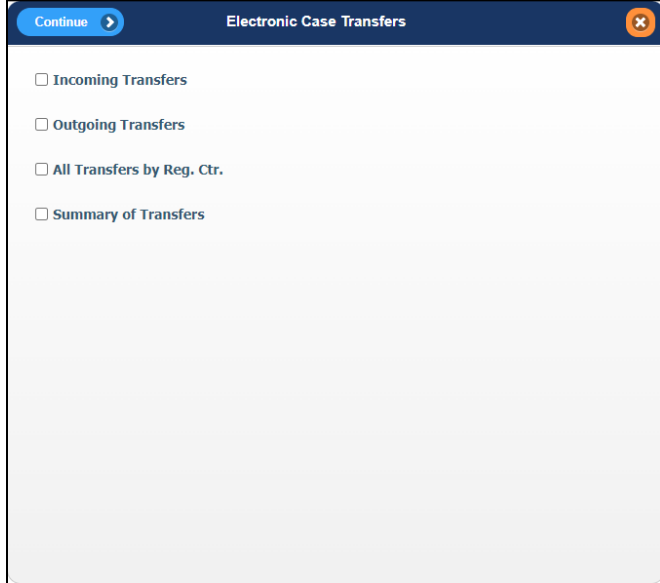
Transfer Requested 01/27/2022 Involving INLAND COUNTIES REGIONAL CENTER


Please see the Inter-Regional Center Case Transfer System for information regarding the transfer of the client noted above.

## Transfer Reports

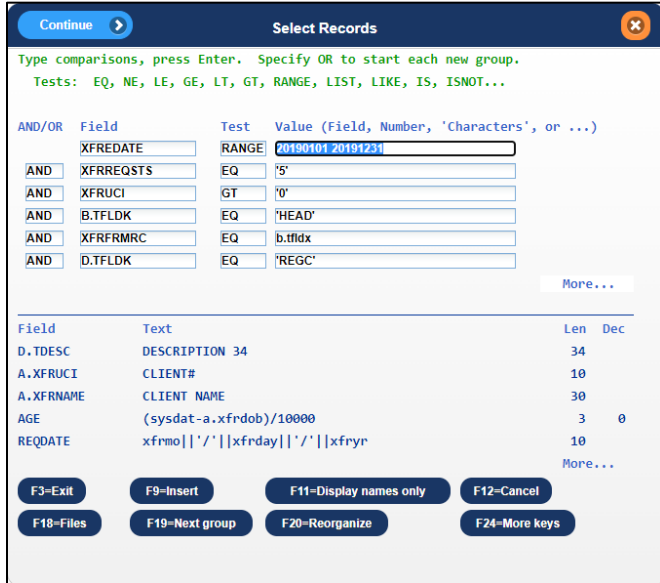
Reports can also be generated and viewed by clicking on Transfer Reports within the Electronic Case Transfers group in the Navigation menu.

Select the desired report and click  when ready.



A Query date entry screen will prompt for all options except **All Transfers By Reg. Ctr.** Modify the dates under XFREDATE and click  when ready.

*Dates are inputted in YYYYMMDD format*











AND/OR	Field	Test	Value (Field, Number, 'Characters', or ...)
	XFREDATE	RANGE	20190101 20191231
AND	XFRREQSTS	EQ	'5'
AND	XFRUCI	GT	'0'
AND	B.TFLDK	EQ	'HEAD'
AND	XFRFRMRC	EQ	b.tfldx
AND	D.TFLDK	EQ	'REGC'

[More...](#)

Field	Text	Len	Dec
D.TDESC	DESCRIPTION	34	
A.XFRUCI	CLIENT#	10	
A.XFRNAME	CLIENT NAME	30	
AGE	(sysdat-a.xfrdob)/10000	3	0
REQDATE	xfrmo  '/'  xfrday  '/'  xfryr	10	

[More...](#)

A report will be displayed showing all transfers and their status for the respective dates selected.

Press **Continue** when ready. A prompt will display to print or email the report. Select any option if desired or press **X** to exit without making any changes.

Line	SENT TO	REGIONAL CTR	CLIENTE	Last Name	First Name	Age	REQDATE	Description
000001	360		6207496				10/21/2019	PROCESSED
000002	360		6283162				10/07/2019	PROCESSED
000003	360		6298506				10/01/2019	REJECTED
000004	360		8227835				10/14/2019	PROCESSED
000005	361		8213382				11/13/2019	PROCESSED
000006	361		8226451				10/02/2019	PROCESSED
000007	363		6254512				09/17/2019	PROCESSED
000008	363		6272214				04/19/2019	REJECTED
000009	363		6272214				05/07/2019	REJECTED
000010	364		6225175				09/09/2019	PROCESSED
000011	364		6231810				06/10/2019	PROCESSED
000012	364		6239696				11/08/2019	PROCESSED
000013	364		6451318				08/01/2019	REJECTED
000014	364		6458502				08/01/2019	REJECTED
000015	364		6994076				12/11/2019	PROCESSED
000016	364		8169419				10/14/2019	PROCESSED
000017	364		8202333				09/27/2019	PROCESSED
000018	364		8202333				09/27/2019	REJECTED
000019	364		8221577				12/19/2019	PROCESSED

## Docushare

Clicking on the Docushare link will open an external window to the Docushare website where credentials can be entered to log-in.

**Login:**

! Access to the site is restricted to specific users  
 Access to the registry is restricted to specific users  
 Account creation is restricted to administrators  
 Group creation is restricted to administrators

**LOGIN** 🔒

Username

Password

Domain: DocuShare ⌵

**LOGIN**

! Note: You must login to add content or see restricted content.

**Forgot your password?**  
Contact your administrator.