EI-Hub Case Management User Guide – Unit 7 (Dashboards & Alerts)
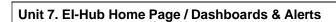
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Revision History

| Version Number	Release Date	Author	Revision Summary
v.0.21.0	**2.23.2024**	Paul Michael Ross	• First draft release
v.0.22.0	**5.6.2024**	Paul Michael Ross	• The most recent update to the Sandbox environment is the addition of the 'Retrieve' button and Action Needed column, which changes the older "Children Assigned to Caseload" Dashboard.
El-Hub Version			**Release Date**
3.83.0.0			**6.30.2024**

EI-Hub Home Page
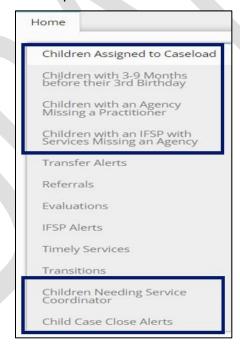
Dashboards & Alerts Overview

This Unit provides a breakdown of the dashboards available in the Case Management component of the EI-Hub. It includes a description of each Dashboard's purpose and functionality and the action(s) required to address the dashboard alert.
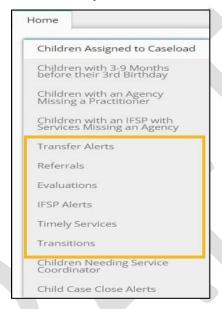
Dashboards/Alerts offer a quick 'at-a-glance' view of child information and relevant alerts about a child's record. The EI-Hub dashboards are similar to the work queues and inboxes utilized in **NYEIS**; dashboards/alerts are task-driven; information from the dashboards informs system users what tasks must be completed. While all users will have dashboards, the alerts they receive will vary based on their role. Users must also use the Alerts/Reports Filters to determine if an action is required on a child's record.

There are two (2) types of dashboards:

'**Informational Dashboards'** track information based on specific timelines defined by the Early Intervention Program (EIP). Information Dashboards do not provide actionable alerts and are present for information and record-keeping purposes. These dashboards are equivalent to the legacy tasks and work queues in NYEIS.

```
Home

┌─────────────────────────────────┐
│ Children Assigned to Caseload   │
│                                 │
│ Children with 3-9 Months        │
│ before their 3rd Birthday       │
│                                 │
│ Children with an Agency         │
│ Missing a Practitioner          │
│                                 │
│ Children with an IFSP with      │
│ Services Missing an Agency      │
└─────────────────────────────────┘

  Transfer Alerts

  Referrals

  Evaluations

  IFSP Alerts

  Timely Services

  Transitions

┌─────────────────────────────────┐
│ Children Needing Service        │
│ Coordinator                     │
│                                 │
│ Child Case Close Alerts         │
└─────────────────────────────────┘
```

'**Alert Dashboards**' notify system users of workflow changes and if an action is required on a child's record. In addition, an '**Edit**' or '**Edit Child**' button will appear, allowing users to navigate to a child's record from the dashboard. **Users are not automatically "alerted"** via a check mark, red dot, or "alert" symbol. Instead, users will have to make it a new **manual** practice/process to check the alert dashboards daily to see if there are new "alerts" to work.

Please note that the system does not automatically generate 'Alerts'; the user must use the 'Report Filters' functionality on the dashboard/alert to find specific information about children on the user's caseload.

The list of Dashboards/Alerts is on the left pane side of your screen; selecting a dashboard displays results in a panel or a grid/table. Dashboards/Alerts can track what items are outstanding or coming due on a child's record. For example, the dashboard "Children with 3-9 months before 3rd birthday" informs users of children turning three years old beginning nine months before their third birthday. Remember, the EI-Hub Dashboard/Alerts a user can view depends on their role. Therefore, not all users can see the same Dashboards/Alerts.

All users will have Dashboards/Alerts, which vary based on their role.
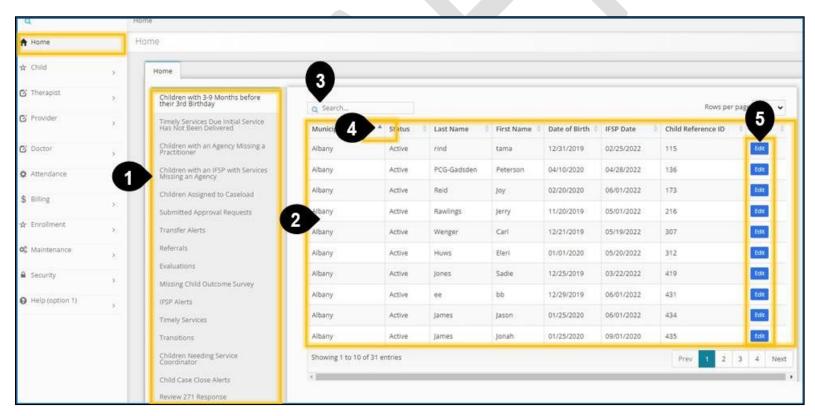
Please note that for Dashboards and Alerts requiring filtering, users must change their alert/filter section on the Dashboard and re-click the 'Search' button to refresh the data in the dashboard results grid.

Navigating the El-Hub Case Management Dashboards

☝ The following definitions correspond to the screenshot below:

1. **Dashboards:** House historical information and specific alerts about a child's record.
2. **Results Grid:** Captures information from a child's record based on the Dashboard selected.
3. **Search Field:** This field allows users to search from a dashboard's results grid. The search feature applies to all columns within the results grid.
4. **Arrow Icon:** This icon allows users to sort data in columns by ascending (A to Z) or descending (Z to A) alphabetical order or by number (e.g., sort by DOB).
5. **Edit** (shown below) or **Edit Child** button**:** Users can open a child's record from the Dashboard's results grid.
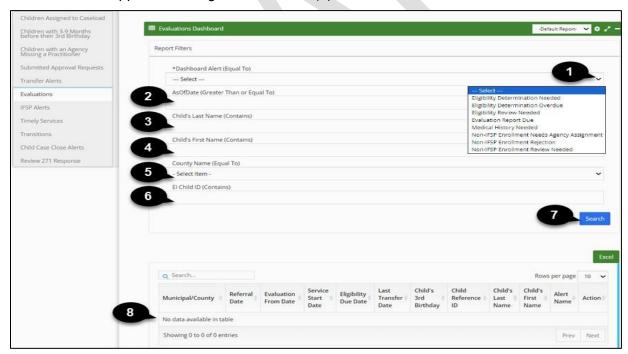
ⓘ **Please note that the image example below describes the navigation only and does not depict the latest screenshot in the El-Hub Home page Dashboards and Alerts.**

Navigating the EI-Hub Case Management Alerts

ⓘ **Remember: Dashboards and Alerts are the mechanisms for completing tasks within EI-Hub on time. Based on your user role assignments, you must check your dashboards daily to ensure children move through the system efficiently and on time.**

☝ The following definitions correspond to the screenshot (e.g., Evaluations Dashboard's **Alert**) below:

1. ***Dashboard Alert (Equal To):** Select the appropriate dashboard alert name from the list using this drop-down; this field is required. Descriptions of these alerts are on pages 29-30 in this user guide.
2. **As Of Date (Greater Than or Equal To):** To narrow your search, enter the approval request start date or use the calendar picker (invoked by selecting/clicking this field).
3. **Child's Last Name (Contains):** Enter the child's last name to narrow your search.
4. **Child's First Name (Contains):** Enter the child's first name to narrow your search.
5. **County Name (Equal To):** This drop-down menu selects the appropriate county name from the list.
6. **EI Child ID (Contains):** Enter the child's early intervention identification number to narrow your search.
7. **Search button:** After using the report filters to populate the fields you need to define, select/click the 'Search' button to generate your results; data appears in the grid/table below (**8**).

Home Tab Controllers

ASCENDING / DESCENDING CONTROLLER	DESCRIPTION
↑ **Upwards Arrow**	• Select/click on the up arrow and sort the columns with text ascending (A to Z) alphabetically or numerically. • Display columns with numbers ranging from the largest to the smallest.
↓ **Downwards Arrow**	• Selecting/clicking on the down arrow and sorting the columns with text descending (Z to A) alphabetically or numerically. • Display columns with numbers ranging from the smallest to the largest.

PAGINATION DISPLAY CONTROLLER	DESCRIPTION
Prev 1, 2, 3... and Next buttons	Prev 1 2 3 4 5 ... 26 Next Pagination allows for viewing large amounts of content in a more accessible manner by finding and breaking up several entries into multiple pages; this will enable users to toggle through the content easily. • Page one (1) shows up by default. • The **Prev** button becomes enabled after selecting/clicking past page one (1) selection. • After selecting/clicking on any number/page, the number button highlighted indicates the current page displayed. • Selecting/clicking the **Next** button advances one page without selecting/clicking a number page button.

PAGINATION DISPLAY CONTROLLER	DESCRIPTION
Rows per page Rows per page [10 ▾] 10 25 50 100	EI-Hub provides data results in grids/tables. For example, a grid/table has a "Rows per page" drop-down menu where you can select how many records/rows of data to display (10, 25, 50, or 100) on one page.

Export Functionality

ⓘ **Dashboards/Alerts in a grid/table have an Excel button except for the 'Children with 3-9 Months before their 3rd Birthday,' 'Timely Services Due Initial Service Has Not Been Delivered,' 'Children Awaiting an IFSP (45 Day Timeline)' and 'Children with an Agency Missing a Practitioner.'**

BUTTON	DESCRIPTION
Excel [Excel]	Select/click this button to export your results (based on the criteria you entered) in an MS Excel spreadsheet. To see your results in Excel, select/click **Open**. ⓘ **Leaving all the Report Filters fields blank will show "all" results.** ⓘ **The Excel export option is helpful if you have a large amount of data to examine; this function allows you to perform data analysis tasks outside the EI-Hub system.**

Dashboards & Alerts Viewed by User Role

Please also refer to the 'Dashboards-at-a-glance Infographic' posted on the LMS.

		Dashboard Name															
		Children with 3-9 Months before their 3rd Birthday	Children with an Agency Missing a Practitioner	Children with an IFSP with Services Missing an Agency	Children Assigned To Your Caseload	Submitted Approval Request	Transfer Alerts	Referrals	Evaluations	Missing Child Outcome Survey	IFSP Alerts	Timely Services	Transition	Children Needing Service Coordinator	Child Case Close Alerts	Death Child Alert	Review 271 Response
Provider Roles	Provider Data Entry NY	View	View		View				View		View	View	View		View		
	Initial Service Coordinator/Ongoing Service Coordinator NY	View	View	View	View		View		View		View	View	View		View		
	Provider QA NY	View			View				View		View	View	View				
	Rendering Provider NY				View				View		View	View					
	Junior Rendering Provider NY				View				View		View	View					
	Provider Fiscal Manager NY		View		View	View			View		View	View	View				View
	Universal Provider NY (Agency)	View	View		View	View	View		View		View	View	View		View		View
	Individual Provider NY	View	View		View	View	View		View		View	View	View		View		View
Municipal/County Roles	Municipal View Only NY		View	View	View		View	View	View		View	View	View	View	View		View
	Municipal Transfer NY																
	Municipal Data Entry NY	View		View	View			Edit	View		View	View	View	View	View		
	EIO/D NY	View	View	View	View		View	Edit	View		View	View	View	View	View		
	Municipal Fiscal All NY	View	View	View	View				View		View	View		View	View		View
	Municipal At Risk Management NY			View	View			View	View		View	View		View			
	Municipal Program All NY	View	View	View	View		View	Edit	View		View	View	View	View	View		View
BEI/State	BEI Provider Entry NY					View				View							
	BEI Provider Approval NY					View				View							
	BEI Audit NY	View	View	View		View			View	View	View	View	View	View	View	View	View
	BEI Superuser NY	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View
	BEI Admin NY	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View
PCG/State	ATD Coordinator NY	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View
	PCG Superuser NY (helpdesk	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View	View
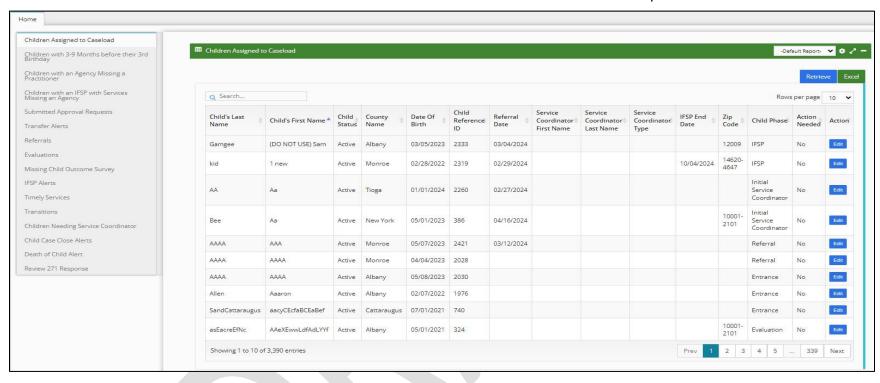
Dashboards & Alerts Triggers/Releases

Please refer to the "**Appendix—Dashboards & Alerts Functionality**" for more information on how a child's record appears on (triggers) or is removed from (releases) the different Dashboards and Alerts.

Home Tab – Dashboards & Alerts

🏠 Home 🖱️ Please note that the screenshot below shows all dashboards and alerts under the Superuser role.

Retrieve 🖱️ The most recent update to the Sandbox environment changes the **"Children Assigned to Caseload" Dashboard.** Within Case Management, users will now notice a recently integrated **"Retrieve"** button. This feature generates a caseload dashboard for users with a single click.

Action Needed 🖱️ The El-Hub uses Dashboards and Alerts rather than a task list. A new **"Action Needed" column** was added to the **Children Assigned to Caseload dashboard** results grid/table. This column indicates whether any action requires attention. It will provide a Yes or No response and can be filtered to prioritize items needing attention.
- If the response is "**Yes**," an "**Accept Assignment**" or "**Agency Assignment**" button option will be available in the '**Action'** column.
- If the response is "**No**," no action is required, and an "**Edit**" button will display in the Action column.

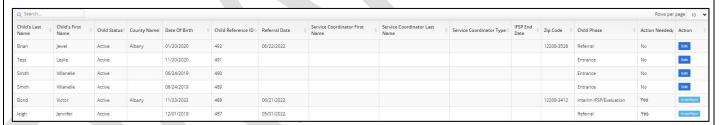| DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
Children Assigned to Caseload • **ProvDataEntryNY** • **ISC/OSC NY** • **ProvQA NY** • **RenderProvNY** • **JrRenderProvNY** • **ProvFiscalMgrNY** • **UniversalProvNY** • **InProviderNY** • **MuniViewOnlyNY** • **MuniDataEntryNY** • **EIO/D NY** • **MuniFiscalAllNY** • **MuniAtRiskMgtNY** • **MuniProgAllNY**	Contains a full listing of children assigned to your caseload. ⓘ**A user having both EIO/D and SC roles may see a child duplicated on their caseload dashboard if assigned to the child in the Teams tab with both roles.** **HOW DO I❓ A Service Coordinator, Health Home Case Manager, or EIO/D gains access to a child's record by being placed on the TEAMS panel. They retain access to the child through their Dashboard, 'Children Assigned to Caseload,' until their assignment through TEAMS is end-dated.** ⓘ**If you select/click the Search button and the Dashboard Alert value has not been selected, the system displays an error message: "You must select a Dashboard Alert before clicking the 'Search' button.** **Results Grid/Table (screenshot is an example of an EIO/D User Profile)**

Child's Last Name	Child's First Name	Child Status	County Name	Date Of Birth	Child Reference ID	Referral Date	Service Coordinator First Name	Service Coordinator Last Name	Service Coordinator Type	IFSP End Date	Zip Code	Child Phase	Action Needed	Action
Brian	Jewel	Active	Albany	01/20/2020	492	06/22/2022					12208-3528	Referral	No	Edit
Tess	Leslie	Active		11/20/2020	491							Entrance	No	Edit
Smith	Villanelle	Active		06/24/2019	490							Entrance	No	Edit
Smith	Villanelle	Active		06/24/2019	489							Entrance	No	Edit
Bond	Victor	Active	Albany	11/23/2022	488	06/21/2022					12208-3412	Interim IFSP/Evaluation	Yes	Accept/Reject
leigh	Jennifer	Active		12/01/2019	487	05/01/2022						Referral	Yes	Accept/Reject

- **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
- **Child's Last Name:** Displays the child's last name.
- **Child's First Name:** Displays the child's first name.
- **County:** Displays the county where the child resides.
- **Child Status:** Displays the child's status ('Active' or 'Inactive').
- **Date of Birth:** Displays the child's date of birth.
- **Child Reference ID:** Displays the child's early intervention reference identification number.
- **Action Needed:** Using the Ascending/Descending Controller (up and down arrows) located on the 'Action Needed' column, a user can sort ('No' or 'Yes') to find if a child's case needs an assignment to be accepted (an "Agency Assignment" or "Accept Assignment" button will appear on the 'Action' column).
- **Action:** Select/click the **Edit** button adjacent to the appropriate record/row to modify a child's record. When selected/clicked, a multi-tabbed with panels appears.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

HOW DO I ❓

- The '**Children Assigned to Caseload**' Dashboard is where all municipalities/agencies will Accept/Reject agency assignments. After making a new assignment, the municipality/agency in the Universal Provider role will see the '**Agency Assignment**' button in the 'Children Assigned to Caseload' grid/table.
- **Note:** Using the' Action Needed' column, you can sort children so that all new assignments appear together at the top of the grid/table.
- If the municipality/agency chooses/accepts the assignment, the **'Agency Assignment**' button changes to '**Edit**.' The municipality/agency can now access the child's record to assign an EIO/D, ISC/OSC, or therapist.
  - o Providers may be assigned multiple service authorizations for a single child. In this case, they must accept/reject each assignment individually.
  - o The grid only includes one entry for each child and does not list the service/services that the agency is being assigned to provide. When the agency selects the '**Agency Assignment,'** they will see that the service has been assigned and can accept or reject the service authorization.
  - o If there are additional service authorizations for that child being assigned to that agency, the '**Edit'** button will not replace the '**Agency Assignment'** button until all service authorizations/assignments have been acted on.
- The EIO/D, ISC/OSC, or therapist will see the child on their 'Children Assigned to Caseload' dashboard, which has an '**Accept/Reject**' button. If they accept, the button changes to an '**Edit**' button, allowing them access to the child's record.

Child's Last Name	Child's First Name	Child Status	County Name	Date Of Birth	Child Reference ID	Referral Date	Service Coordinator First Name	Service Coordinator Last Name	Service Coordinator Type	IFSP End Date	Zip Code	Child Phase	Action Needed	Action
Brian	Jewel	Active	Albany	01/20/2020	492	06/22/2022					12208-3528	Referral	No	Edit
Tess	Leslie	Active		11/20/2020	491							Entrance	No	Edit
Smith	Villanelle	Active		06/24/2019	490							Entrance	No	Edit
Smith	Villanelle	Active		06/24/2019	489							Entrance	No	Edit
Bond	Victor	Active	Albany	11/23/2022	488	06/21/2022					12208-3412	Interim IFSP/Evaluation	Yes	Accept/Reject
leigh	Jennifer	Active		12/01/2019	487	05/01/2022						Referral	Yes	Accept/Reject

The 'Children Assigned to Caseload' popup panel appears when the user selects or clicks the '**Accept/Reject**' button (shown below).

ⓘ **All fields in this popup panel are read-only except the 'EIO/D or Service Coordinator Accept/Reject' drop-down.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Children Assigned to Caseload

EIO/D or Coordinator Entry
EIO/D
*Start Date
2/23/2023
*EIO/D or Service Coordinator Status
Active
First Name
Alex
Last Name
Karev
EIO/D or Service Coordinator Accept/Reject

Accepted
Rejected

- **Note:** Once a child Exits/Transitions out of the EIP program or is transferred to another municipality, the system removes that child's name from your Children Assigned to Caseload dashboard.

HOW DO I ? **The 'Children Assigned to Caseload' dashboard includes active children in At-Risk and EIP tracks; how can I distinguish between 'Active EIP' and 'Active At-Risk' children?**

The "**Child Details**" report allows users to view all children, not just At-Risk. Users can export the data to Excel and then sort to see just At-Risk; this report generates a list of all children within your county and indicates whether they are At-Risk or EIP.

The Referrals dashboard also has alert types to help monitor At-Risk children:
1. New At-Risk Referral Received,
2. Developmental Surveillance Due and
3. Follow-up Developmental Surveillance Due. |

For those who manage At-Risk children, we recommend that they use the **Child Details** report to get a complete list of At-Risk children. **You can export it to Excel** and filter it to show At-Risk children only. Then, the user can use the **Children Assigned to Caseload** dashboard and/or the Child Lookup to access (and edit) the child's record using the child record number.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
🗞 **Children with 3-9 Months before their 3rd Birthday** 👪 • **ProvDataEntryNY** • **UniversalProvNY** • **InProviderNY** • **MuniDataEntryNY** • **EIO/D NY** • **MuniFiscalAllNY** • **MuniProgAllNY**	☞ This Dashboard is for users of Children with an Individualized Family Service Plan (IFSP) who are of transition age (3-9 months before their third birthday or older) and don't have a Transition Planning Conference Date. **Results Grid/Table** • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the municipality/county where the child resides. • **Child Reference ID:** Displays the child's early intervention reference identification number. • **Child's Last Name:** Displays the child's last name. • **Child's First Name:** Displays the child's first name. • **Status:** Displays the child's status ('**Active**' or '**Inactive**'). • **Date of Birth:** Displays the child's date of birth. • **Child's 3rd Birthday:** Displays the child's 3rd birthday date. • **Days to 3rd Birthday:** Displays the days to the child's 3rd birthday date. • **Due Date:** Displays the child's IFSP due date. • **Active IFSP Start Date:** Displays the child's IFSP start date. • **Active IFSP End Date:** Displays the child's IFSP end date. • **Action:** Select/click the Edit button adjacent to the appropriate record/row to modify a child's record. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Timely Services
 	
• **ProvDataEntryNY**
• **ISC/OSC NY**
• **ProvQA NY**
• **ProvFiscalMgrNY**
• **UniversalProvNY**
• **InProviderNY**
• **MuniViewOnlyNY**
• **MuniDataEntryNY**
• **EIO/D NY**
• **MuniFiscalAllNY**
• **MuniProgAllNY**
	Informs users that the rendering providers should have provided initial services within the timelines outlined in the Early Intervention Program.
	
	HOW DO I ?
	
	• **Purpose:** List child records where the Timely Services alert is listed.
	• **Alerts:**
	   i. **Service Due Date Approaching**
	     • **Purpose** – For example, a child's service authorization is between 15 and 30 days **after** the start date, and no service has been rendered. **This applies to all services.**
	   ii. **Service Overdue**
	     • **Purpose**—For example, if a child's service authorization is 30 days past the start date and no service has been rendered, specifically look for a date in the First Service Date field.
	   iii. **Delay Reason Needed**
	     • **Purpose** - If the service has been delivered but the First Service Date field is longer than 30 days from the start date of the service or the Date of Parent signature, whichever comes last.
	   iv. **Confidentiality Letter Due**
	     • **Purpose** – Check that this letter has been sent during three intervals of the child's program; an alert is only available for five (5) days.
	       ▪ 365 days from referral to 370 days
	       ▪ 730 days from referral to 735 days
	       ▪ 1095 days from referral to 1100 days
	   • **Note:** This Dashboard is currently populated by child and service, resulting in multiple entries for each child. Please continue to utilize your internal county procedures to monitor the release of annual letters to families.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Report Filters Report Filters *Dashboard Alert (Equal To) - Select Item - - Select Item - Confidentiality Letter Due Delay Reason Needed Service Due Date Approaching Service Overdue **Results Grid/Table** | Municipal/County ▲	Status	Child First Name	Child Last Name	Service Coordinator First Name	Service Coordinator Last Name	Services	IFSP Date	First Service Date	Days	Child Reference ID	
---	---	---	---	---	---	---	---	---	---	---	---
Albany	Closed	January PMB DNU	Miller			Nursing	04/20/2022		113	70	Edit
Albany	Closed	January PMB DNU	Miller			Nursing	06/16/2022		56	70	Edit
Albany	Closed	January PMB DNU	Miller			Respite Care	04/20/2022		113	70	Edit
Albany	Closed	January PMB DNU	Miller			Respite Care	06/16/2022		56	70	Edit	 • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the municipality/county where the child resides. • **Status:** Displays the child's status ('**Active**' or '**Inactive**'). • **Child First Name:** Displays the child's first name. • **Child Last Name:** Displays the child's last name. • **Service Coordinator First Name:** Displays the service coordinator's first name. • **Service Coordinator Last Name:** Displays the service coordinator's last name. • **Services:** Displays the services provided for the child. • **IFSP Date:** Displays the child's IFSP date. • **First Service Date:** Displays the date the services began for the child. • **Days:** The system displays the days before the child's service delivery. • **Child Reference ID:** Displays the child's early intervention reference identification number. • **Action:** Select/click the Edit button adjacent to the appropriate record/row to modify a child's record. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
Children with an Agency Missing a Practitioner • **ProvDataEntryNY** • **ISC/OSC NY** • **ProvFiscalMgrNY** • **UniversalProvNY** • **InProviderNY** • **MuniViewOnlyNY** • **EIO/D NY** • **MuniFiscalAllNY** • **MuniProgAllNY**	Informs users that a rendering provider (therapist) has not been assigned to a service authorized on the IFSP by the presence of the Service Authorization (SA). ⓘ **A similar dashboard for the non-IFSP service authorizations is under the Evaluations dashboard (Non-IFSP Enrollment Needs Agency Assignment).** **HOW DO I ?** • **Purpose:** A list of child records where a service has not been assigned a therapist. **Results Grid/Table** • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the municipality/county where the child resides. • **Last Name:** Displays the child's last name. • **First Name:** Displays the child's first name. • **Date of Birth:** Displays the child's date of birth. • **IFSP Date:** Displays the child's IFSP date. • **IFSP Type:** Displays the IFSP type for the child. • **IFSP Status:** Displays the child's IFSP status. • **IFSP Start Date:** Displays the date the IFSP began for the child. • **Service Type:** Displays the service type for the child. • **Company Assigned:** Display the company assigned to provide the child's IFSP service. • **Child Reference ID:** Displays the child's early intervention reference identification number. • **Action:** Select/click the **Edit** button adjacent to the appropriate record/row to modify a child's record. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
📰 **Children with an IFSP with Services Missing an Agency** 👥 • **ISC/OSC NY** • **MuniViewOnlyNY** • **EIO/D NY** • **MuniProgAllNY** • **MuniFiscalAllNY**	✍ Informs users of service authorizations needing an agency (or) independent provider assignment. ⓘ **The Children with an IFSP with Services Missing an Agency reflects any service authorizations for which no agency has been assigned. The agency assignment may have yet to happen, or the assigned agency rejected the assignment.** **HOW DO I** ❓ • **Purpose:** A list of child records where a service has not been assigned to an agency. **Results Grid/Table** <table><tr><td>Q Search...</td><td colspan="11">Rows per page 10 ⌄</td></tr><tr><td>Municipal/County ▲</td><td>Last Name</td><td>First Name</td><td>Status</td><td>Date of Birth</td><td>IFSP Date</td><td>IFSP Type</td><td>IFSP Status</td><td>IFSP Start Date</td><td>Service Type</td><td>Child Reference ID</td><td></td></tr><tr><td>Albany</td><td>PCG-Gadsden</td><td>Pearl</td><td>Active</td><td>09/01/2020</td><td>06/01/2022</td><td>Initial</td><td>Draft</td><td>06/01/2022</td><td>Assistive Technology</td><td>1</td><td>Edit</td></tr><tr><td>Albany</td><td>PCG-Gadsden</td><td>Pearl</td><td>Active</td><td>09/01/2020</td><td>06/01/2022</td><td>Initial</td><td>Draft</td><td>06/01/2022</td><td>Audiology</td><td>1</td><td>Edit</td></tr><tr><td>Albany</td><td>PCG-Gadsden</td><td>Pearl</td><td>Active</td><td>09/01/2020</td><td>06/01/2022</td><td>Initial</td><td>Draft</td><td>06/01/2022</td><td>Respite Care</td><td>1</td><td>Edit</td></tr><tr><td>Albany</td><td>PCG-Gadsden</td><td>Pearl</td><td>Active</td><td>09/01/2020</td><td>06/01/2022</td><td>Initial</td><td>Draft</td><td>06/01/2022</td><td>Transportation</td><td>1</td><td>Edit</td></tr></table> • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the municipality/county where the child resides. • **Last Name:** Displays the child's last name. • **First Name:** Displays the child's first name. • **Date of Birth:** Displays the child's date of birth. • **IFSP Date:** Displays the child's IFSP date. • **IFSP Type:** Displays the IFSP type for the child. • **IFSP Status:** Displays the child's IFSP status. • **IFSP Start Date:** Displays the date the IFSP began for the child. • **Service Type:** Displays the service type for the child. • **Child Reference ID:** Displays the child's early intervention reference identification number. • **Action:** Select/click the **Edit** button adjacent to the appropriate record/row to modify a child's record. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

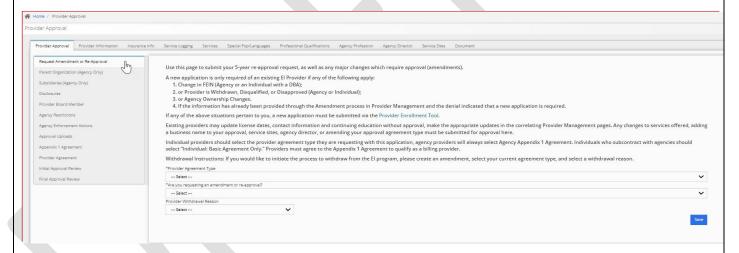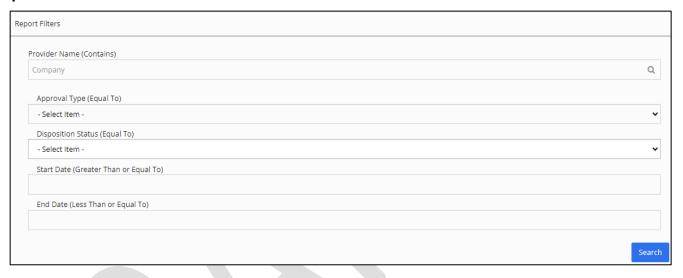| DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
📰 Submitted Approval Requests • **ProvFiscalMgrNY** • **UniversalProvNY** • **InProviderNY**	👆 Informs users of requests for re-approvals or amendments. ✋ **It's important to understand that the 'View' button on the Submitted Approvals Requests dashboard is specifically for pre-existing agreements. When you click it, a new form will open (Provider Approval > 'Request- Amendment or Re-Approval panel). Do NOT complete this form (shown below) or select/click the 'Submit' button; doing so will create a new agreement record. Please remember that only agreements created within the EI-Hub Case Management are accessible for viewing via this panel. Your careful use of this button is key to maintaining the integrity of your records.** ⓘ **The 'UniversalProvNY,' 'ProvFiscalMgrNY,' and the 'InProviderNY' roles can only view their amendment and re-approval requests (including Provider Status Management).**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Report Filters

Report Filters

Provider Name (Contains)

Company 🔍

Approval Type (Equal To)

- Select Item - ⌄

Disposition Status (Equal To)

- Select Item - ⌄

Start Date (Greater Than or Equal To)

End Date (Less Than or Equal To)

Search

- **Provider Name (Equal To):** Select the appropriate provider's name from the list using this drop-down.
- **Approval Type (Equal To):** Use this drop-down and select the appropriate approval type (Amendment or Re-approval) from the list.
- **Disposition Status (Equal To):** Select the appropriate disposition status from the list using the drop-down.
- **Start Date (Greater Than or Equal To):** To narrow your search, enter the approval request start date or use the calendar picker (invoked by selecting/clicking this field).
- **End Date (Less Than or Equal To):** To narrow your search, enter the approval request end date or use the calendar picker (invoked by selecting/clicking this field).

ⓘ**Users will only have access to their own records; selecting the 'Search' button without entering search criteria will return the full history of their agency/provider approval, re-approval, and amendment requests.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Results Grid/Table

Provider Name	Approval Type	Disposition Status	Provider Agreement Type	Entered Date	Approved/Denied Date	Action
ABC Company	Amendment	Final Approval	Agency: Basic Agreement & Appendix 1 Agreement : Basic Agreement & Appendix 1 Agreement	12/15/2021	12/16/2021	View
ABC Company	Amendment	Final Approval	Agency: Basic Agreement & Appendix 1 Agreement : Basic Agreement & Appendix 1 Agreement	12/16/2021	12/21/2021	View
ABC Company	Amendment	Final Approval	Individual: Basic Agreement Only : Basic Agreement Only	12/22/2021	12/29/2021	View
Albany County Company	Reapproval	Initial Approval	Individual: Basic Agreement & Appendix 1 Agreement : Basic Agreement & Appendix 1 Agreement	12/16/2021		View
Disney Kids Therapy Services	Reapproval	Initial Approval	Agency: Basic Agreement & Appendix 1 Agreement : Basic Agreement & Appendix 1 Agreement	12/16/2021		View

- **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
- **Provider Name:** This column displays the provider's name.
- **Approval Type:** This column displays the approval type.
- **Disposition Status:** This column displays the disposition status. (Please see descriptions of the Disposition Statuses in the table below)
- **Provider Agreement Type:** This column displays the provider's agreement type.
- **Entered Date:** This column displays the entered date,
- **Approval/Denied Date:** This column displays the approval or denied date.
- **Action:** Select/click the View button adjacent to the appropriate record/row to review a provider's record. When selected/clicked, a multi-tabbed with panels appears. Please refer to the Request Amendment or Re-Approval Panel **in the CM Unit 8 User Guide**.

ⓘ**The blue 'View' button will be available for all returned approval request results; however, it will only be functional for re-approvals and amendment requests submitted through the El-Hub Case Management System.**

ⓘ**For providers,current approval statuses will be migrated, and new applications will be submitted through PEM. Selecting/clicking the 'View' button brings the provider to a blank Provider Approval tab.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Disposition Status Descriptions

Disposition Status	Description
Withdrawn	The applicant has withdrawn their submission.
Submitted	The applicant has submitted the PAU for review. The request will remain in this status until initial approval or disapproval. The applicant cannot make edits while the application is in the submitted status.
In Process	The provider has started a new amendment or re-approval request that has not been submitted. The applicant can continue to make edits.
Disapproved	The application has been disapproved by either the initial or final approver and returned to the applicant for edits. If the initial approver disapproves the application, there will be no date in the Approved/Denied Date. If the final approver is the person who disapproves the application, the date they submitted the disapproval will be shown in the Approved/Denied Date.
Final Approval	The initial and final approvers have approved the application, and the provider may now provide services. The final approval issued by the final approver will result in this status and the date of the Approved/Denied Date field being populated. No additional edits can be made to the application; any changes require an amendment.
Migrated	The approval was migrated from NYEIS.

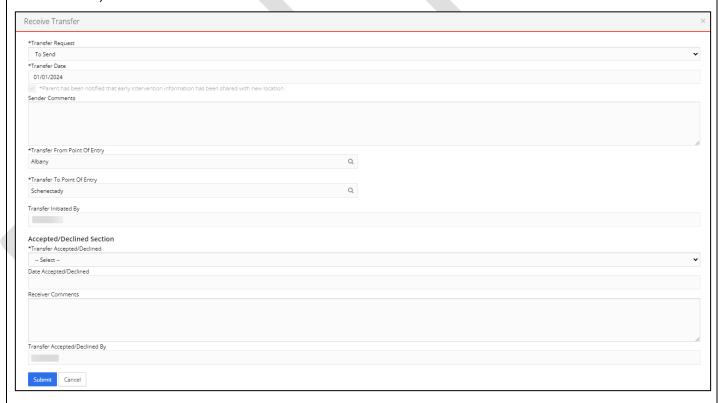| DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Transfers Alerts
 	
 • **ISC/OSC NY**
 • **RenderProvNY**
 • **JrRenderProvNY**
 • **ProvFiscalMgrNY**
 • **UniversalProvNY**
 • **InProviderNY**
 • **MuniViewOnlyNY**
 • **EIO/D NY**
 • **MuniProgAllNY**
	Informs users of incoming transfer requests, including informing users when a transfer request has been rejected.
	
	 HOW DO I
	
	 • **Purpose:** A list of child records where Transfer alerts are listed.
	 • **Alerts:**
	     i. **Incoming Transfer**
	       • **Purpose** – The user to see a transfer coming to their location.
	     ii. **Transfer Request**
	       • **Purpose** – The user to see a transfer is being requested from their location.
	     iii. **Transfer Rejected**
	       • **Purpose** – The user will see that a transfer was rejected for only seven (7) days.
	
	 Report Filters
	
	 Report Filters
	 *Dashboard Alert (Equal To)
	 - Select Item -
	 - Select Item -
	 Incoming Transfer
	 Transfer Rejected
	 Transfer Request
	 Search
	
	 Results Grid/Table ("Incoming Transfer" example)

Results Grid/Table ("Incoming Transfer" example)

Transfer From Point of Entry	Transfer To Point of Entry	Child Reference ID	Child's Last Name	Child's First Name	Status	Alert Name	Days Since Created	Days Since Rejected	Child's 3rd Birthday	Action
Albany	Schoharie	2243608	eatdSao	cQcbbchQAbfAsWfs	Active	Incoming Transfer	2		12/01/2025	Receive Transfer
Schoharie	Albany	884932	Bibo	Alexander	Active	Incoming Transfer	-1		04/24/2024	Receive Transfer

Showing 1 to 2 of 2 entries   Prev 1 Next

- **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
- **Transfer from Point of Entry:** Displays the county the child transferred from.
- **Transfer to Point of Entry:** Displays the county the child transferred to.
- **Child Reference ID:** Display the child's early intervention reference identification number.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	• **Child's Last Name:** Displays the child's last name. • **Child's First Name:** Displays the child's first name. • **Status:** Displays the child's status ('Active' or 'Inactive'). • **Alert Name:** Displays the transfer alert name. • **Days Since Created:** Displays the days since the child transferred was created. • **Days Since Rejected:** Displays the days since the child transferred was rejected. • **Child's 3rd Birthday:** Displays the child's 3rd birthday date. • **Action:** Select/click the **Receive Transfer** button adjacent to the appropriate record/row to receive a child's transfer. When selected/clicked, the 'Receive Transfer' popup panel appears (shown below).

Receive Transfer ×

*Transfer Request
To Send

*Transfer Date
01/01/2024

☑ *Parent has been notified that early intervention information has been shared with new location

Sender Comments

*Transfer From Point Of Entry
Albany 🔍

*Transfer To Point Of Entry
Schenectady 🔍

Transfer Initiated By

Accepted/Declined Section
*Transfer Accepted/Declined
-- Select --

Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

[Submit] [Cancel]

ⓘ **An asterisk (*) adjacent to a field name/label indicates that you must populate a required field.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

FIELD / CHECKBOX	DESCRIPTION
*Transfer Request	A read-only field that displays the transfer request.
*Transfer Date	Enter the child's transfer date manually or use the calendar picker (invoked by selecting/clicking this field).
☐ The parent has been notified that early intervention information has been shared with the new location.	A read-only checkbox. If 'Yes,' it is selected/ticked. If 'No,' it is blank.
Sender Comments	A read-only text field, if applicable, with additional sender comments, would be available.
*Transfer From Point Of Entry	A read-only field that displays the transfer based on the child's county of residence.
*Transfer To Point Of Entry	A read-only field displaying the child transferred to the county.
Transfer Initiated By	A read-only field displays the person who initiated the transfer.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Accepted/Declined Section

*Transfer Accepted/Declined	Select the appropriate item ('**Accepted**' or '**Declined**') using the drop-down field.
*Transfer Date	Enter the child's transfer date manually or use the calendar picker (invoked by selecting/clicking this field).
Date Accepted/Declined	This read-only field populates the current date when you select 'Accepted' or 'Declined' in the field above.
Receiver Comments	Use this text box to enter applicable comments on receiving the child's transfer.
Transfer Accepted/Declined By	A read-only field that auto-populates/displays with the user's name entering data into the Receiver Transfer popup panel.
Transfer Accepted County	A read-only field that auto-populates/displays the county only when the 'Transfer Accepted/Decline' field has an "**Accepted**" listed above.

BUTTON	DESCRIPTION
Submit Submit	To save your entry, select/click this button. When selected/clicked, the system removes the child's record from the Transfer Alerts grid/table, and a multi-tabbed window with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**
Cancel Cancel	To cancel the action for receiving a child transfer, select/click this button. When selected/clicked, the 'Receive Transfer' popup panel closes.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Results Grid/Table ("**Transfer Rejected**" example)

Transfer from County	Transfer to County	Child Reference ID	Childs Last Name	Childs First Name	Status	Alert Name	Days Since Created	Days Since Rejected	Child's 3rd Birthday	Action
Albany	Schoharie	58	Barney	Charles	Active	Transfer Rejected	277	0	03/03/2023	Edit

Showing 1 to 1 of 1 entries   Prev **1** Next

Action: To review a provider's record, select/click the Edit button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed window with panels appears. **Please refer to the Request Amendment or Re-Approval Panel in the CM Unit 8 User Guide.**

Results Grid/Table ("**Transfer Request**" example)

Transfer from County	Transfer to County	Child Reference ID	Childs Last Name	Childs First Name	Status	Alert Name	Days Since Created	Days Since Rejected	Child's 3rd Birthday	Action
Albany	Schenectady	12	PCG-Gaits	Paulina	Active	Transfer Request	279		03/12/2023	Receive Transfer
Albany	Greene	113	PCG-Gallay	Prince	Active	Transfer Request	265		11/24/2024	Receive Transfer

Action: Select/click the **Receive Transfer** button adjacent to the appropriate record/row to receive a child's transfer. When selected/clicked, the 'Receive Transfer' popup panel appears (**please refer to the "Incoming Transfer" example above**).

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
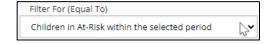
Referrals
 	
• **UniversalProvNY**
• **InProviderNY**
• **MuniViewOnlyNY**
• **MuniDataEntryNY**
• **EIO/D NY**
• **MuniFiscalAllNY**
• **MuniAtRiskMgtNY**
• **MuniProgAllNY**
	Informs users of new referrals, resulting in a new child assignment. It also includes an alert for developmental surveillance due.
	
	ⓘ
	
	• **Purpose:** List child records where a Referral alert is listed.
	• **Alerts:**
	   • **New EIP Referral Received**
	      • **Purpose** - Inform the user that a new EIP Referral has been added and no EIO/D has been assigned.
	   • **New At-Risk Referral Received**
	      • **Purpose** - To notify the At-Risk coordinator of the new Referral. **Note:** They should complete the intake process.
	   • **Social Service Notification**
	      • **Purpose** – Inform the user that the child has a checkbox for "Is the child a ward of social services?" is checked.
	   • **Developmental Surveillance Due**
	      • **Purpose** – Inform the user that an At-Risk child has not had a developmental surveillance record entered.
	   • **Follow-up Developmental Surveillance Due**
	      • **Purpose** – Inform the user that an At-Risk child has not entered a follow-up developmental surveillance record. **Note:** The alert is triggered 90 days after the developmental surveillance instrument has been mailed or administered. The alert is released when the date of the mailing or administering follow-up instrument is entered. The process repeats in 90-day increments.
	
	Using the 'Child Details' report and setting the report filter to 'Children in At-Risk within the selected period' will return active At-Risk children within your county.
	
	Filter For (Equal To)
	Children in At-Risk within the selected period ▾

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Report Filters **Results Grid/Table** - **Search:** Enter a keyword into this field to search the results grid/table for a specific record. - **Municipal/County:** Displays the name of the Municipality/County. - **Child Reference ID:** Display the child's EI-Hub system reference identification number. - **Child Last Name:** Displays the child's last name. - **Child First Name:** Displays the child's first name. - **Alert Name:** Displays the alert name. - **Referral Date:** Displays the referral date for the child. - **Child's 3rd Birthday:** Displays the child's 3rd birthday date. - **Review Due Date:** Displays the review due date for the child. - **Last, Follow Up Development Surveillance Date:** Displays the surveillance due date for the child. - **Action:** Select/click the **Edit Child** button adjacent to the appropriate record/row to review a transfer alert record. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Evaluations
 	
• **ProvDataEntryNY**
• **ISC/OSC NY**
• **ProvQA NY**
• **RenderProvNY**
• **JrRenderProvNY**
• **ProvFiscalMgrNY**
• **UniversalProvNY**
• **InProviderNY**
• **MuniViewOnlyNY**
• **MuniDataEntryNY**
• **EIO/D NY**
• **MuniFiscalAllNY**
• **MuniAtRiskMgtNY**
• **MuniProgAllNY**
	Informs users of timelines related to evaluations; this includes alerts for eligibility determination, medical history needed, and evaluation rejections.
	
	These dashboards track two different actions.
	• **The Evaluation Report Due returns children with a 30-day evaluation service authorization for which no results have been entered.**
	• **The Eligibility Determination Needed dashboard tracks the child 40 days after the date of referral, and no eligibility information has been entered in the Eligibility panel.**
	
	HOW DO I
	
	• **Purpose:** A list of child records where Evaluation and Eligibility alerts are listed.
	• **Typical User:** Service Coordinator, EIO/D, and Evaluator
	• **Alerts:**
	   i. **Evaluation Report Due**
	   ii. **Purpose** – No results have been added by the evaluators for the evaluation service authorization. **Non-IFSP Enrollment Needs Agency Assignment**
	      • **Purpose—Inform the user that a service authorization (enrollment) outside of an IFSP, such as initial service coordination or multidisciplinary evaluations to establish eligibility,** has been created without an agency assigned.
	         • **Note:** Service authorizations for services and evaluations that are part of an IFSP missing an agency assignment will be located on the Children with an IFSP with Services Missing an Agency Dashboard.
	   iii. **Non-IFSP Enrollment Review Needed**
	      • **Purpose** – Inform the user that a service authorization (enrollment) outside of an IFSP, such as initial service coordination or multidisciplinary evaluation to establish eligibility, has been entered. This alert indicates that the EIO/D needs to review the service authorization.
	         • **Note:** Service authorizations for services and evaluations part of an IFSP will not be available through this Dashboard. These service authorizations will be approved as part of the IFSP approval process and managed through the IFSP Alerts Dashboard.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

	iv. **Non-IFSP Enrollment Rejection**
	
	    • **Purpose** – Inform the user that the EIO/D has rejected a submitted service authorization (enrollment) for initial service coordination or a multidisciplinary evaluation to establish eligibility.
	
	        • **Note:** This Dashboard only includes rejected authorizations for services outside an IFSP. Service authorization rejections for services associated with an IFSP (general services, ongoing service coordination, evaluations to determine ongoing eligibility) should result in the Rejection of the entire IFSP and will be located on the IFSP Alerts Dashboard when filtered by the IFSP Rejection alert.
	
	v. **Medical History Needed**
	
	    • **Purpose** – Inform the user that the medical history information has not been entered.
	
	vi. **Eligibility Review Needed**
	
	    • **Purpose** – Inform the user that a child's eligibility review is needed. **Note:** The EIO/D needs to review the Eligibility determination entered by the Evaluation team.
	
	vii. **Eligibility Determination Needed**
	
	    • **Purpose—Inform the user that the eligibility panels have not** been started 30 days after the referral but less than 40 days.
	
	viii. **Eligibility Determination is Overdue**
	
	    • **Purpose** – Inform the user that the eligibility panels have not been started after 40 days from referral.
	
	ⓘ *Suppose a service coordinator submits a request for a supplemental evaluation after an IFSP meeting. Would it be listed under the "non-IFSP" Dashboard?*
	
	A: No, that service authorization (enrollment) is on an IFSP with the other IFSP services. The EIO/D would approve it when they review and approve the IFSP. The EIO/D would access the IFSP Alerts and select the IFSP Submitted for Review dashboard.

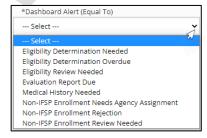| DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Report Filters ⓘ**If you select/click the 'Search' button and the 'Dashboard Alert (Equal To)' drop-down field is not populated, the system will display the following error message at the top of your screen.** Dashboard Alert must be selected before clicking search button. Report Filters Dashboard Alert (Equal To) --- Select --- AsOfDate (Greater Than or Equal To) Child's Last Name (Contains) Child's First Name (Contains) County Name (Equal To) - Select Item - El Child ID (Contains) Search • **Dashboard Alert (Equal To):** Select the appropriate Dashboard alert name from the list using this drop-down. *Dashboard Alert (Equal To) --- Select --- --- Select --- Eligibility Determination Needed Eligibility Determination Overdue Eligibility Review Needed Evaluation Report Due Medical History Needed Non-IFSP Enrollment Needs Agency Assignment Non-IFSP Enrollment Rejection Non-IFSP Enrollment Review Needed • **As Of Date (Greater Than or Equal To):** To narrow your search, enter the approval request start date or use the calendar picker (invoked by selecting/clicking this field). • **Child's Last Name (Contains):** Enter the child's last name to narrow your search. • **Child's First Name (Contains):** Enter the child's first name to narrow your search.

| DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	• **County Name (Equal To):** Select the appropriate county name from the list using this drop-down. • **EI Child ID (Contains):** Enter the child's early intervention identification number to narrow your search. **Results Grid/Table** • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the name of the Municipality/County. • **Referral Date:** Displays the referral date for the child. • **Evaluation From Date:** Displays the evaluation date for the child. • **Service Start Date:** Displays the service start date for the child. • **Eligibility Due Date:** Displays the child's eligibility due date. • **Last Transfer Date:** Displays the child's last transfer date. • **Child's 3rd Birthday:** This column displays the child's 3rd birthday date • **Child Reference ID:** This column displays the child's reference identification early intervention number. • **Child's Last Name:** This column displays the child's last name. • **Child's First Name:** This column displays the child's first name. • **Alert Name:** This column displays the alert name. • **Action:** To review an evaluation alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel <u>in the CM Unit 8 User Guide</u>.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Missing Child Outcome Survey
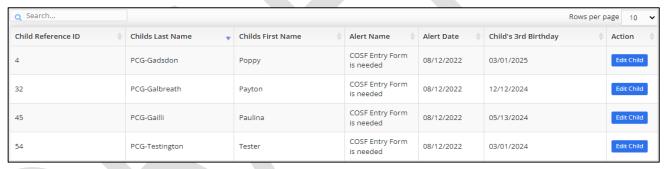 	
DOH/BEI & PCG Only
	Informs users when entry and exit forms are due.
	
	• **Purpose:** A list of child records where Missing Child Outcome Survey alerts are listed.
	• **NOTE:** This report is restricted to DOH/BEI and PCG.
	• **Alerts:**
	  i. **COSF Entry Form is needed**
	    • **Purpose** – A child record does not have a COSF entry record.
	  ii. **COSF Exit Form is needed**
	    • **Purpose** – A child record does not have a COSF exit record.
	
	Results Grid/Table

Child Reference ID	Childs Last Name	Childs First Name	Alert Name	Alert Date	Child's 3rd Birthday	Action
4	PCG-Gadsdon	Poppy	COSF Entry Form is needed	08/12/2022	03/01/2025	Edit Child
32	PCG-Galbreath	Payton	COSF Entry Form is needed	08/12/2022	12/12/2024	Edit Child
45	PCG-Gailli	Paulina	COSF Entry Form is needed	08/12/2022	05/13/2024	Edit Child
54	PCG-Testington	Tester	COSF Entry Form is needed	08/12/2022	03/01/2024	Edit Child

• **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
• **Child Reference ID:** Display the child's El-Hub system reference identification number.
• **Child's Last Name:** Displays the child's last name.
• **Childs's First Name:** Displays the child's first name.
• **Alert Name:** Displays the alert name.
• **Alert Date:** Displays the date of the alert.
• **Child's 3rd Birthday:** Displays the child's 3rd birthday date.
• **Action:** To review a child's missing outcome survey alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

| DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

IFSP Alerts
 	
• **ProvDataEntryNY**
• **ISC/OSC NY**
• **ProvQA NY**
• **RenderProvNY**
• **JrRenderProvNY**
• **ProvFiscalMgrNY**
• **UniversalProvNY**
• **InProviderNY**
• **MuniViewOnlyNY**
• **MuniDataEntryNY**
• **EIO/D NY**
• **MuniFiscalAllNY**
• **MuniAtRiskMgtNY**
• **MuniProgAllNY**
	Informs users of events related to IFSPs, including submissions, rejections, due dates, and waivers.
	
	HOW DO I ?
	
	• **Purpose:** A list of child records where IFSP alerts are listed.
	• **Alerts:**
	   i. **IFSP End Date Approaching** (Initial IFSP)
	     • **Purpose** – Inform the user that the IFSP(s) will end within 30 days before the end date of the IFSP.
	   ii. **IFSP Submitted for Review** (Initial IFSP)
	     • **Purpose** - Inform the user that the new IFSP has been submitted for approval.
	   iii. **IFSP Rejection** (Initial IFSP)
	     • **Purpose** – Inform the user that the approval of the IFSP has been rejected.
	   iv. **Waiver Submission**
	     • **Purpose** – Notify a person that a Waiver record has been entered but not reviewed.
	   v. **Children Awaiting an IFSP (45-Day Timeline)** (Initial IFSP)
	     • **Purpose** – Notify the user that the eligible child has no IFSP record.
	   vi. **IFSP Meeting Overdue**
	     • **Purpose** – Inform the user when a child has not had an IFSP meeting created after 45 days from the **Referral date**.
	
	If the user enters an initial IFSP, the system calculates 45 days from the the referral date to the IFSP meeting date. If the IFSP meeting date is greater than 45 days from the referral date, the system notifies the user that they must document why the IFSP was late using the drop-down.
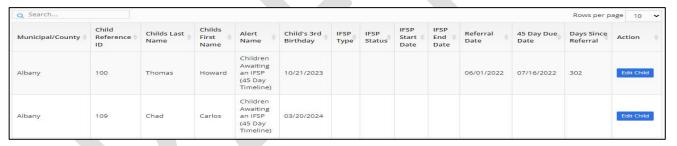	
	Users can use the IFSP dashboard to monitor the 45-day timeline using the dashboard alert filter "Children Awaiting an IFSP (45-Day Timeline)."

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Report Filters: **Results Grid/Table** [Example below showing 'Children Awaiting an IFSP (45 Day Timeline)] • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the name of the Municipality/County. • **Child's Reference ID:** Display the child's EI-Hub system reference identification number. • **Child's Last Name:** Displays the child's last name. • **Child's First Name:** Displays the child's first name. • **Alert Name:** Displays the alert name. • **IFSP End Date:** Displays the IFSP end date. • **Child's 3rd Birthday:** Displays the child's 3rd birthday date. • **IFSP Type:** Displays the IFSP type/stage in the process. • **IFSP Status:** Displays the Status of the IFSP. • **Referral Date:** Displays the IFSP referral date. • **45-Day Due Date:** Displays the 45-day referral due date. • **Days Since Referral:** Displays the days since the referral was started. • **Action:** To review a child's IFSP alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

Report Filters:

Report Filters

Dashboard Alert (Equal To)

- Select Item -

- Select Item -
Children Awaiting an IFSP (45 Day Timeline)
IFSP End Date Approaching
IFSP Meeting Overdue
IFSP Rejection
IFSP Submitted for Review
Waiver Submission

Search

Results Grid/Table [Example below showing 'Children Awaiting an IFSP (45 Day Timeline)]

Municipal/County	Child Reference ID	Childs Last Name	Childs First Name	Alert Name	Child's 3rd Birthday	IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Referral Date	45 Day Due Date	Days Since Referral	Action
Albany	100	Thomas	Howard	Children Awaiting an IFSP (45 Day Timeline)	10/21/2023					06/01/2022	07/16/2022	302	Edit Child
Albany	109	Chad	Carlos	Children Awaiting an IFSP (45 Day Timeline)	03/20/2024								Edit Child

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Timely Services
 	
• **ProvDataEntryNY**
• **ISC/OSC NY**
• **ProvQA NY**
• **RenderProvNY**
• **JrRenderProvNY**
• **ProvFiscalMgrNY**
• **UniversalProvNY**
• **InProviderNY**
• **MuniViewOnlyNY**
• **MuniDataEntryNY**
• **EIO/D NY**
• **MuniFiscalAllNY**
• **MuniAtRiskMgtNY**
• **MuniProgAllNY**
	Informs the user that services are overdue and that a reason for delay is needed.
	
	HOW DO I
	
	• **Purpose:** List child records where the Timely Service alert is listed.
	• **Alerts:**
	   i. **Service Due Date Approaching**
	     • **Purpose**—A child's service record is between 15 and 30 days old, and no service has been rendered.
	   ii. **Service Overdue**
	     • **Purpose** – A user should see all services that have not received a rendered service record after 30 days, specifically looking for a date in the First Service Date field.
	   iii. **Delay Reason Needed**
	     • **Purpose** - If service has been delivered, but the First Service Date field is greater than 30 days from the start date of the service or the Date of Parent signature, whichever comes last.
	   iv. **Confidentiality Letter Due**
	     • **Purpose** – Check that this letter has been sent during three intervals of the child's program; an alert is only available for five (5) days.
	       ▪ 365 days from referral to 370 days
	       ▪ 730 days from referral to 735 days
	       ▪ 1095 days from referral to 1100 days

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Results Grid/Table (Example below shows the "Service Overdue" Dashboard Alert)

Municipal/County	Child Reference ID	Child's Last Name	Child's First Name	Alert Name	Last Referral Date	Child's 3rd Birthday	IFSP Type	IFSP Status	IFSP Start Date	Service Type	Service Status	Service Start Date	Agency	Service Delivered Date	Service Due Date	Days Since Referral Date	Action
Albany	1640	Flowers	May	Service Overdue	05/25/2023	12/25/2023	Initial	Submitted	05/17/2023	Service Coordination – Ongoing	Active	05/17/2023	Albany county 2		06/16/2023	47	Edit Child
Albany	1637	Monday	Monday	Service Overdue	05/13/2023	12/25/2025	Initial	Active	05/16/2023	OT	Active	05/16/2023	Albany county 2		06/15/2023	59	Edit Child
Monroe	687	SandMonroe	Henry	Service Overdue	05/03/2023	07/01/2024	Initial	Active	05/08/2023	PT	Active	05/09/2023	Monroe county 1		06/08/2023	69	Edit Child

- **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
- **Municipal/County:** Displays the name of the Municipality/County.
- **Child's Reference ID:** Display the child's EI-Hub system reference identification number.
- **Child's Last Name:** Displays the child's last name.
- **Child's First Name:** Displays the child's first name.
- **Alert Name:** Displays the alert name.
- **Last Referral Date:** Displays the last referral date.
- **Child's 3rd Birthday:** Displays the child's 3rd birthday date.
- **IFSP Type:** Displays the IFSP type for the child.
- **IFSP Status:** Displays the IFSP status for the child.
- **IFSP Start Date:** Displays the date the IFSP began for the child.
- **Service Type:** Displays the service type for the child.
- **Service Status:** Displays the service status.
- **Service Start Date:** Displays the service start date.
- **Agency:** Displays the agency's name providing the service for the child.
- **Service Delivery Date:** Displays the date the service was delivered.
- **Service Due Date:** Displays the service due date.
- **Days Since Referral Date:** Displays the days since the referral began.
- **Action:** To review a child's timely services alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Transition
 	
 • **ProvDataEntryNY**
 • **ISC/OSC NY**
 • **MuniViewOnlyNY**
 • **MuniDataEntryNY**
 • **EIO/D NY**
 • **MuniProgAllNY**
	Informs users of approaching transition conference timelines, including potential CPSE eligibility.
	
	 HOW DO I
	
	 • **Purpose:** A list of child records where Transition alerts are listed.
	 • **Triggers:** Months of January and July.
	 • **Alerts:**
	     i. **Potential CPSE Eligibility Approaching**
	        • **Purpose** – The user will see child records where the "Notice to CPSE at least 90 days before the child is eligible for 4410 Services" date <= 30 days away.
	
	 ⓘ **Please note that records listed in this Dashboard may take time to process due to the number of records that may appear. Therefore, users should export (using the Excel button) and manage offline data, particularly in January and July.**
	
	     ii. **Transition Conference Approaching**
	        • **Purpose** – The user will see child records where the current date is after the "Transition Conference Convened no earlier than" date and the transition conference has not been held.
	     iii. **Transition Planning Required**
	        • **Purpose** – The user will see child records where the parent has not completed the IFSP Transition panel.
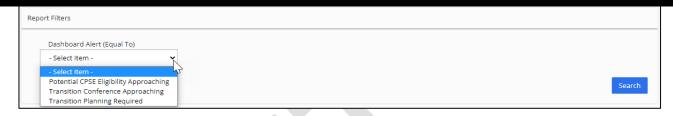	
	 ⓘ **If you select/click the Search button and the Dashboard Alert value has not been selected, the system displays an error message: "You must select a Dashboard Alert before selecting/clicking the 'Search' button.**
	
	 Report Filters

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Report Filters

Dashboard Alert (Equal To)

- Select Item -

- Select Item -
Potential CPSE Eligibility Approaching
Transition Conference Approaching
Transition Planning Required

Search

Results Grid/Table

Municipal/County	Child Reference ID	Child's Last Name	Child's First Name	Alert Name	Child's 3rd Birthday	Service Coordinator	Scheduled Transition Conference Date	Transition Conference Date	Action
Cattaraugus	1377	hfdgdfhg	dgfdg	Transition Planning Required	01/01/2024		10/02/2022		Edit Child
Schoharie	58	Barney	Charles	Transition Planning Required	03/03/2023	Brown, Hunter	09/16/2022		Edit Child
New York	1327	Transition	Child	Transition Planning Required	01/02/2023		08/30/2022		Edit Child
Albany	173	Reid	Joy	Transition Planning Required	02/20/2023	LINDEN, LISA	08/12/2022	06/15/2022	Edit Child

- **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
- **Municipal/County:** Displays the name of the Municipality/County.
- **Child Reference ID:** Display the child's EI-Hub system reference identification number.
- **Child Last Name:** Displays the child's last name.
- **Child First Name:** Displays the child's first name.
- **Alert Name:** Displays the alert name.
- **Child's 3rd Birthday:** Displays the child's third birthday date.
- **Service Coordinator:** Displays the child's service coordinator's name.
- **Scheduled Transition Conference Date:** Displays the child's scheduled transition conference date.
- **Transition Conference Date:** Displays the date the child's transition conference occurred.
- **Action:** To review a child's transition alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to**

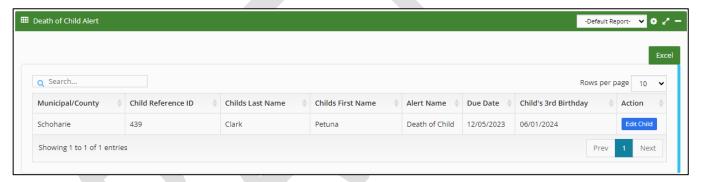**the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Children Needing Service Coordinator
 	
 • **MuniViewOnlyNY**
 • **MuniDataEntryNY**
 • **EIO/D NY**
 • **MuniProgAllNY**
 • **MuniAtRiskMgtNY**
 • **MuniProgAllNY**
	Informs users of children requiring a service coordinator assignment and includes notice of the service coordinator assignment rejections.
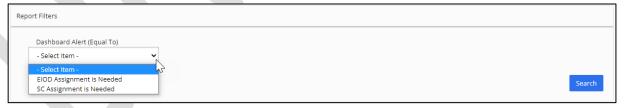	
	 The Children Needing Service Coordinator tracks no TEAMS assignment for a service coordinator. It does not track the existence of a service authorization. With service authorization, the service coordinator can log their services.
	
	 HOW DO I
	
	 • **Purpose:** List child records where the alert is listed.
	 • **Alerts:**
	      i. **New EIO/D Assignment**
	          • **Purpose** – Inform the user that a child record needs an EIO/D assignment.
	      ii. **Service Coordinator Assignment**
	          • **Purpose** – Inform the user that a child record needs an SC assignment.
	      iii. **Service Coordinator Rejection**
	          • **Purpose** – Inform the user that a child record needs an SC assignment; SC rejected the original assignment. **Note: The child drops off the Dashboard when the service coordinator accepts the assignment.**
	
	 Report Filters
	
	 Report Filters
	
	 Dashboard Alert (Equal To)
	 - Select Item -
	 - Select Item -
	 EIOD Assignment is Needed
	 SC Assignment is Needed
	
	 Search

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
	Results Grid/Table • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the name of the Municipality/County. • **Child Reference ID:** Display the child's EI-Hub system reference identification number. • **Child Last Name:** Displays the child's last name. • **Child First Name:** Displays the child's first name. • **Alert Name:** Displays the alert name. • **Child's 3rd Birthday:** Displays the child's third birthday date. • **EIO/D Name:** Displays the child's Early Intervention Official Designee name. • **SC Agency Name:** Displays the service coordinator's agency name. • **Service Coordinator:** Displays the child's service coordinator's name. • **Action:** To review a child needing a service coordinator alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Child Case Close Alerts	Informs users that a child's record is expected to be closed (the child needed to be exited from the system) because the child is over three (3) years of age or the child has passed away.
	
	HOW DO I ?
	
	• **Purpose:** List child records where the Child Case Close alert is listed.
	• **Alerts:**
	    i. **Potential Case Close Needed**
	        • **Purpose** – Inform the user that the child's record may need to be closed at three (3) years old.
	
	Results Grid/Table

Municipal/County ▲	Child Reference ID	Childs Last Name	Childs First Name	Alert Name	Child's 3rd Birthday	Action
Albany	481	Kauffman	Jesse	Potential Case Closure Needed	10/12/2022	Edit Child
Albany	482	Ramsey	Eric	Potential Case Closure Needed	02/10/2023	Edit Child
Albany	468	Dean	Sean	Potential Case Closure Needed	11/20/2022	Edit Child
Albany	469	Gold	Evans	Potential Case Closure Needed	11/12/2022	Edit Child

Search...   Rows per page 10

• **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
• **Municipal/County:** Displays the name of the Municipality/County.
• **Child Reference ID:** Display the child's EI-Hub system reference identification number.
• **Child Last Name:** Displays the child's last name.
• **Child First Name:** Displays the child's first name.
• **Alert Name:** Displays the alert name.
• **Child's 3rd Birthday:** Displays the child's 3rd birthday date.
• **Action:** To review a child's missing outcome survey alert record, select/click the **Edit Child** button adjacent to the appropriate record/row. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID

Death of Child Alert

DOH/BEI & PCG Only

Informs users of a child(s) that passed and is no longer in the EIP. It is an informational-only dashboard. The trigger is when a date of death is entered for a child, and the release is 90 days past the date of death.

- **Purpose:** List child records where the Death of a Child alert is listed.
- **NOTE: This report is restricted to DOH/BEI and PCG**.

Results Grid/Table

Death of Child Alert							-Default Report-

Excel

Search...						Rows per page 10	
Municipal/County	Child Reference ID	Childs Last Name	Childs First Name	Alert Name	Due Date	Child's 3rd Birthday	Action
Schoharie	439	Clark	Petuna	Death of Child	12/05/2023	06/01/2024	Edit Child

Showing 1 to 1 of 1 entries — Prev 1 Next

- **Search:** Enter a keyword into this field to search the results grid/table for a specific record.
- **Municipal/County:** Displays the name of the Municipality/County.
- **Child Reference ID:** Display the child's EI-Hub system reference identification number.
- **Child Last Name:** Displays the child's last name.
- **Child First Name:** Displays the child's first name.
- **Alert Name:** Displays the alert name.
- **Due Date:** The alert remains on the grid for 90 days past the date of death. This is the date the child will be removed from the alert.
- **Child's 3rd Birthday:** Displays the child's 3rd birthday date.
- **Action:** This is an informational alert and requires no action. The **Edit** button will allow the user to view the child's entire record.

DASHBOARD / ALERT USER ROLE	DESCRIPTION / GRID
Review 271 Response – To be renamed to **"Insurance Alert."** • **ProvFiscalMgrNY** • **UniversalProvNY** • **InProviderNY** • **MuniViewOnlyNY** • **MuniFiscalAllNY** • **MuniProgAllNY**	This Alert informs users that a child's insurance information needs to be verified; this occurs once every three (3) months from the start of the child's case. **Results Grid/Table** <table><tr><td colspan=7>Q Search... Rows per page 10 ▾</td></tr><tr><td>Municipal/County</td><td>Child Reference ID</td><td>Child's Last Name</td><td>Child's First Name</td><td>Alert Name</td><td>Child's 3rd Birthday</td><td>Action</td></tr><tr><td colspan=7>No data available in table</td></tr><tr><td colspan=5>Showing 0 to 0 of 0 entries</td><td colspan=2>Prev Next</td></tr></table> • **Search:** Enter a keyword into this field to search the results grid/table for a specific record. • **Municipal/County:** Displays the name of the Municipality/County. • **Child Reference ID:** Display the child's EI-Hub system reference identification number. • **Child's Last Name:** Displays the child's last name. • **Child's First Name:** Displays the child's first name. • **Alert Name:** Displays the alert name. • **Child's 3rd Birthday:** Displays the child's 3rd birthday date. • **Action:** Select/click the Edit Child button adjacent to the appropriate record/row to review a transfer alert record. When selected/clicked, a multi-tabbed with panels appears. **Please refer to the Child Demographics Summary Panel in the CM Unit 8 User Guide.**

Appendix: Dashboards and Alerts Functionality

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
The container on the homepage is where the alert is placed.	A Sortable/Searchable tag alert has been given.	The general purpose of the alert.	Users who can see alerts on their dashboards. (Note: only assigned children can be seen)	Relevant panel from which alert criteria are drawn	Relevant Fields and conditional rules are needed to create alerts.	Relevant panel from which alert criteria get released	Relevant Fields needed to release alert.	Conditional Rules are required to release the alert.
Children Assigned to Caseload	**Children Assigned to Caseload** (EIO/D/SC)	Contains a full listing of children assigned to your caseload.	**EIO/D and SC are looking at the child's record**	Case Management> Child > Team tab & Child Basic Demo panel	Recipient Name Entered into either. Service Coordinator Field. Or EIO/D in Teams Panel. And The current date is within the Teams' record Start and End Date range. And Recipient accepts assignment using Accept/Reject Button on Teams Record. **Note: In the event of a future assignment, the child will appear on the 'Child Assigned to Caseload' up to 30 days before the assignment's start date, allowing the SC/therapist to adjust their schedules adequately.**	Case Management > Child > Child Info > Basic Demographics And Case Management> Child > Team tab > Team grid	Child Status Coordinator name for EIO/D or non EIO/D.	Service Coordinator or EIO/D Assigned Accepts or Rejects Assignment. Or The current date is within the Teams Record's start and end date. Or The Service Coordinator or EIO/D becomes Inactive. Or Child Exits, or Case is closed.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Children Assigned to Caseload	**Children Assigned to Caseload** (Therapist/Company)	Contains a full listing of children assigned to your caseload.	**Therapist/ Company - looking at the enrollment record level.**	Enrollment Start Date and End Date.	The Agency/Company has an associated employee who successfully entered the Teams panel. And The Current date is within the team's record Start and End Date range. And Recipient accepts assignment using Accept/Reject Button on Teams Record. **Note:** In the event of a future assignment, the child will appear on the 'Child Assigned to Caseload' up to 30 days before the assignment's start date, allowing the SC/therapist to adjust their schedules adequately.	Case Management > Child > Child Info > Basic Demographics And Evaluation grid and Service grid	Child Status Company Assignment Therapist Assignment	Associate/Company Assigned Accepts or Rejects Assignment. Or The current date is within the Teams Record's start and end date. Or The Service Coordinator or EIO/D becomes Inactive. Or Child Exits, or Case is Closed.
Children with 3-9 Months before their 3rd birthday	**Children with 3-9 Months before their 3rd birthday**	Children with an IFSP of transition age (3-9 months before their third birthday Or older) don't have a Transition Planning Conference Date.	**All users**	Case Management > Child > Child Info > Basic Demographics And Case Management > Child > Transition - Exit > Transition Plan Information	Child Age = 3 years minus 9 Months. And No Transition Conference Date Entered. **Note:** System accounts for leap years.	Case Management > Child > Child Info > Basic Demographics And Case Management > Child > Transition - Exit > Transition Plan Information	Child Status Transition Conference Date	Child Exits Or Transition Conference Date Entered.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Children with an Agency Missing a Practitioner	Children with an Agency Missing a Practitioner	, This Dashboard identifies children who still need a rendering provider assigned.	All users	Case Management > Child > Service > Therapist Assignment And Case Management > Child > Evaluation > Evaluator Assignment	No Therapist or Evaluator was Assigned to the Case.	Case Management > Child > Service > Therapist Assignment And Case Management > Child > Evaluation > Evaluator Assignment	Company Name OR Agency Name	The Therapist or Evaluator is Assigned to the Case.
Children's Enrollments missing an Agency	Children with an IFSP with Services Missing an Agency	The IFSP **must** be made available immediately upon parental consent for service(s). The Service Coordinator serves as the single point of contact for the family and facilitates EI services for the child and family; hence, this Dashboard identifies children who are missing an agency.	All users	Case Management > Child > Service > Company Assignment And Case Management > Child > Evaluation > Evaluation Information	A Company or Agency has yet to be assigned.	Case Management > Child > Service > Company Assignment And Case Management > Child > Evaluation > Evaluation Information	Therapist Name OR Evaluator Name	The Company or Agency has been assigned.
Transfer	Incoming Transfer	The Transfer is waiting to be acted on.	Muni Superuser	Child > Transfer, Exit & Close tab > Transfer grid > Transfer panel	The "To Send" field has been entered Successfully. The Receiving county has not Accepted/Declined the Transfer. **Note:** This is also called a "pull" transfer.	Transfer Popup panel	Transfer Accepted/Declined	The Transfer is either Accepted or Rejected.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Transfer	**Transfer Request**	County A requests County B to transfer the child from County A to County B.	**Muni Superuser (Receiving the request)**	Child > Transfer, Exit & Close tab > Transfer grid > Transfer panel	The "To Receive" field has been entered Successfully. The Sending county has not Accepted/Declined the Transfer. **Note:** This is also called a "push" transfer.	Transfer Popup panel	Transfer Accepted/Declined	The Transfer is either Accepted or Rejected.
Transfer	**Transfer Rejected**	The Receiving county has rejected the Transfer.	**Muni Supervisor (Transferring)**	Child > Transfer, Exit & Close tab > Transfer grid > Transfer panel	The "To Receive" and "To send" fields have been entered Successfully And Denial of Transfer by the recipient	Transfer Popup panel	Transfer Accepted/Declined	7 Days have passed since the Transfer Denial. Or Transfer Accepted Or New Transfer Occurs
Referral	**New EIP Referral Received**	New Referral (EIO/D Assignment Needed)	**Muni Superuser**	Child >Child Info tab > Referral EIP grid Child >Teams tab > EIO/D Service Coordinator grid	The 'Referral Status' is Open, and the Referral Type is Primary And EIO/D has yet to be assigned.	Child >Teams tab > EIO/D Service Coordinator panel	EIO/D Service Coordinator Type	EIO/D Successfully Assigned.
Referral	**New At-Risk Referral Received**	New At-Risk Referral **Referral Reason = AT-RISK**	**At Risk Manager**	Child >Child Info tab > Referral At-Risk grid	Referral At-Risk Record Entered And The Referral Status is Open and Primary. And No Date Child Entered At-Risk Surveillance entered.	Referral At-Risk Developmental Surveillance	Date Child Entered At-Risk Surveillance	Date Child At-Risk Development Surveillance Filled Successfully
Referral	**Social Services Notification**	Referred Child is a ward of social services.	**Muni Superuser**	Case Management > Child > Child Info > Basic Demographics Child >Teams tab > EIO/D Service Coordinator grid	The Referral Status is Open and Primary. And Checkbox Selected for "Is Child a Ward of Social Services."	Child >Child Demographics	Is the Child a ward of social services	Child Exits Or Checkbox Unselected for "Is Child a Ward of Social Services."

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Referral	Developmental Surveillance Due	The At-Risk Manager would receive a quarterly alert to note that developmental surveillance is due for the child. **A quarter of a year has passed.**	**At Risk Manager**	Child >Child Info tab > At-Risk Referral grid >At-Risk Referral grid > At-Risk Referral panel Child > Child Info tab > Referral At-Risk grid > Referral At-Risk Developmental Surveillance panel	The Referral Status is Open and Primary. And The Date of At-Risk Referral is within 90 Days. And No Date Initial Developmental Surveillance Tool mailed/administered Entered. And Date Child Entered At-Risk Surveillance Not Entered.			Date Child Entered At-Risk Surveillance Entered.
Referral	Follow Up Developmental Surveillance Due	The At-Risk Manager would receive a quarterly alert to note that developmental surveillance is due for the child. **A quarter of a year has passed.**	**At Risk Manager**	Child >Child Info tab > At-Risk Referral grid > At-Risk Referral panel Child > Child Info tab > Referral At-Risk grid > newest record in At-Risk Developmental Surveillance Follow-Up grid	The Referral Status is Open and Primary. And The date in child-entered at-risk surveillance has passed by 90 days. Or A 90-day increment has passed since the alert was generated.			Date entered on At-Risk Developmental Surveillance Follow-Up panel passed. And Date Follow-Up Developmental Surveillance Tool Mailed/Administered is less than or equal to 90 days.
Evaluation	Evaluation Report Due	Notification should be sent to the Provider of Record and Evaluating Providers assigned on the SA for the evaluation.	**Provider of Record**	Child >Eval Info tab > Evaluation grid > Evaluation Information Child >Eval Info tab > Evaluation grid > Screening Information Child >Eval Info tab > Evaluation grid > Supplemental Evaluation	The Enrollment Type is Evaluation. And The Evaluation Was Started 30 Days ago. And No Screening Date was Entered. Or No Developmental Assessment Not Entered. Or Supplemental Evaluation Not Entered.	Provider of Record dashboard		Screening Date Entered Successfully. Or Developmental Assessment From Date Entered. Or Supplemental Evaluation Date Entered.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Evaluation	Non-IFSP Enrollment Needs Agency Assignment	Notification of referral.	Provider of Record	Child >Eval Info tab > Evaluation grid	Enrollment Record Not Linked to IFSP. And Enrollment Record has no agency Assigned.	Provider of Record (Evaluation SA) dashboard.	Accept or Reject button.	Agency Assignment Entered into Enrollment Record.
Evaluation	Evaluation Report Due	There is an enrollment waiting for review.	EIO/D	Child > Eval Info tab > Evaluation grid Child > Elig tab > Eligibility grid	Enrollment Record Not Linked to IFSP. And Enrollment EIO/D Approval needs to be entered.			EIO/D Approval Entered.
Evaluation	Non-IFSP Enrollment Review Needed.	There is an enrollment waiting for review.	EIO/D	Child > Eval Info tab > Evaluation grid Child > Elig tab > Eligibility grid	Enrollment Record Not Linked to IFSP. *And* Enrollment EIO/D Approval not entered.			EIO/D Approval Entered.
Evaluation	Non-IFSP Enrollment Rejection	EIO/D has rejected enrollment	Service Coordinator	Child > Eval Info tab > Evaluation grid	Enrollment Record Not Linked to IFSP. And Enrollment EIO/D Approval has Rejection Entered.			Alert Displays for 14 days. Or Enrollment gets EIO/D approval.
Evaluation	Medical History Needed	Medical history not obtained	Active Service Coordinator	Child > Eval Info tab > Birth/Medical History panel	The Child's Medical History Record has no Child History Entries.	4 Child Menu > 4.4 Evaluation - Eligibility Tab > 4.4.8 Birth/Medical History Panel	At least all Required fields	The child's Medical History Record was entered successfully.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Evaluation	Eligibility Determination Needed	ISC gets a notification at 30 days. **. If no entry was made in the Eligibility Outcome field in the Eligibility Panel on the 10th day from the date of referral, it was triggered on that day**. **Transfer Cases:** An overdue evaluation notification was sent to ISC. If no entry has been made in the Eligibility Outcome field in the Eligibility Panel, it is triggered on the 10th day of the transfer acceptance date.	ISC	Child > EIP Referral grid > EIP Referral panel Child > Child Transfer > Transfer panel Child > Eligibility grid > Eligibility Dates	The Referral Status is Open and Primary. And Sent to EIO/D for review and has yet to be checked. And Enrollment Type = Evaluation And The Current Date is Between 30 and 40 Days Past the Referral Date. And No Determination Date is set. And Either The transfer date is not entered, or the last referral date is after the transfer date. Or The Transfer Date is After the Referral Date. And The Determination Date occurs Before the Transfer Date.	4 Child Menu > 4.4 Evaluation - Eligibility Tab > 4.4.18 Eligibility Panel	Eligibility Outcome field	Determination Date Entered. And Sent to EIO/D for Review is checked.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Evaluation	Eligibility Determination Overdue	**40 Days must pass** A notification was sent to ISC. If no entry had been made in the Eligibility outcome field in the Eligibility Panel on the 10th day from the date of referral, it was triggered on that day. **Transfer Cases:** An overdue evaluation notification has been sent to EIO/D. If no entry has been made in the Eligibility Outcome field in the Evaluation panel, it is triggered on the 40th day from the Transfer Acceptance Date.	EIO/D	Child > EIP Referral grid > EIP Referral panel Child > Child Transfer > Transfer panel Child > Eligibility grid > Eligibility Dates	The Referral Status is Open and Primary. And Enrollment Type = Evaluation And The Current Date is 40 Days Past the Referral Date. And No Determination Date is set. And Sent to EIO/D for review and has yet to be checked. Either The Last Referral Date Occurs After the Transfer Date. And The Current Date is after or 40 Days past the referral Date. Or The Current Date is After or 40 Days Past the Transfer Date. And The Determination Date occurs before the Transfer Date.	4 Child Menu > 4.4 Evaluation - Eligibility Tab > 4.4.18 Eligibility Panel	Eligibility Outcome field	Determination Date Entered. And Sent to EIO/D for Review is checked.
Evaluation	Eligibility Review Needed			Child > Eligibility tab > Eligibility grid	Eligibility Sent to EIO/D for Review. And EIO/D Review Date Not Entered And EIO/D reviews & confirms eligibility criteria have been met and Not Entered.	In the Eligibility Dates panel, the EIO/D Review Date is entered. AND Eligibility Dates panel - EIO/D reviews & confirms eligibility criteria have been met is checked.		EIO/D Review Date Entered. And EIO/D reviews & confirms eligibility criteria have been met and entered.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Child Outcome Survey	A COSF Entry Form is needed	**1.** Once the child is found applicable for the COS enrollment for the specific program year, the alert should be triggered before the initial IFSP to alert the initial IFSP team to assess and complete a COS entry form during the initial IFSP meeting. **2.** The alert considers transfers (eligible in county A and initial IFSP meeting in county B).	**EIO/D**	Child > IFSP tab > IFSP grid remove > Child > IFSP tab > IFSP grid > Outcomes grid remove > Child > Transfer, Exit & Close tab > Child Exit panel Child > Child/Family Outcomes tab > COSF grid	IFSP is initial or Interim. And IFSP Not Canceled or Closed. COSF Doesn't Contain a COFT Type Entry.	COSF grid		COSF Grid contains a COSF Type Entry.
Child Outcome Survey	A COSF Exit Form is needed	**1.** Once the child has received at least six months of general services and was enrolled in COS with a complete COS entry form, the alert should be triggered for each review IFSP. **2.** Transfers (COS entry form filled out in county A and then transferred to county B) are also considered in the alert. **3.** A child can have multiple COS exit forms completed in the review IFSPs. Therefore, all these exit forms should be kept in	**EIO/D** **SC** **Review IFSP Team Providers**	Child > IFSP tab > IFSP grid remove > Child > IFSP tab > IFSP grid > Outcomes grid remove > Child > Transfer, Exit & Close tab > Child Exit panel Child > Child/Family Outcomes tab > COSF grid	IFSP Contains 1st Review IFSP. And 1st Review IFSP isn't canceled or closed. And No COSF Exit Form Entry has been Made.	COSF grid		COSF Exit form entered.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
		the child's record. For example, suppose a COS exit form is filled out in one of the reviews IFSPs, but the child stays in EIP to receive EI general services after completing the exit form. In that case, the alert should still be triggered again for the following review IFSP to complete another COS exit form until the child exits.						
IFSP	IFSP End Date approaching	Notification that an IFSP end date is approaching. Thirty days (30) from the end date of IFSP should be included in the report. **30 Days from the End Date.**	EIO/D	Child >IFSP tab > IFSP grid	IFSP is Active. And Active IFSP's End Date is Within 30 Days of the current date.			A new IFSP is created.
IFSP	IFSP Submitted for review	An IFSP is waiting for approval to EIO/D.	EIO/D	Child > IFSP tab > IFSP grid	IFSP has been submitted.			A Submitted IFSP, not on the IFSP Record.
IFSP	IFSP Rejection	EIO/D has rejected IFSP.	SC	Child>IFSP>IFSP Information Panel	IFSP has been submitted. And EIO/D Approval Field = Rejected			IFSP Status = Draft Or The Last Modified Date Occurs After the Date of Rejection.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
IFSP	Waiver Submission	Notify EIO/D that the Waiver has been submitted for review.	EIO/D	Child >IFSP tab > IFSP grid Child >IFSP tab > IFSP grid > IFSP Services grid > Waiver grid	IFSP is not Cancelled, closed, or in draft status. And Waiver Record Entered. And Waiver Status Not Entered.			A Waiver status has been entered.
IFSP	Children Awaiting an IFSP (45-Day Timeline)	The evaluation and assessment process must be completed within 45 calendar days of the child being referred to the EI program. In addition, The initial meeting to develop an IFSP for an eligible child and family must take place within 45 days of the referral date. Furthermore, if a child is not released from this dashboard within 45 days, they will automatically be moved to the IFSP Meeting Overdue Dashboard, highlighting the importance of timely actions.		Child Menu > Child - Family Tab > Referral Sub-Tab > Referral grid > Referral panel And Child > Evaluation tab > Evaluation grid > Evaluation Information panel AND Child > Eligibility tab > Eligibility grid > Eligibility Dates panel And Child > IFSP > IFSP Information	Evaluation Information Has an Entry with a Start Date. And Eligibility has a record where the EIO/D confirms Eligibility. And No Initial IFSP was created. Or IFSP is Initial, and the Status is Draft/Canceled.			The initial IFSP was created and is NOT a draft or canceled.
Timely Service	IFSP Meeting Overdue	Forty-six days no IFSP meeting notice.	EIO/D	Child >Elig tab > Eligibility grid > Eligibility Determination panel AND Child > IFSP tab > IFSP grid contains IFSP record	45 Days have passed since the Referral Date. And IFSP is **not** a Draft, Closed, or Cancelled. IFSP Entry contains no Meeting date.	4 Child Menu > 4.5 IFSP Tab > 4.5.2 Confirmation of IFSP Meeting Notification Panel.	Meeting Date field	IFSP Entry contains the Meeting Date.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Timely Service	Service Due Date Approaching		EIO/D	Child >IFSP tab > IFSP grid > IFSP Information panel Child > IFSP tab > IFSP grid > IFSP Service Grid > Service Delivery AND Child > IFSP tab > IFSP grid > IFSP Service Grid > Service Delay Reason grid	IFSP is Not a Draft, Closed, Interim, or Canceled. And The Enrollment Service Type is used for Timely Service. And IFSP contains an IFSP Service Record with Authorization # where the First Service Date (from the Attendance table) does not contain a record for this Service Type. And IFSP with Authorization # has a Service Date or Parent Signature Date within 45 Days from the Current Date.			IFSP Authorization Contains a service date or Parent Signature Date Closer than 30 days from the current date. **Note:** If 30 days pass, this releases the service from this Alert and triggers the service on the Services Overdue Alert.
Timely Service	Services Overdue		EIO/D	Child >IFSP tab > IFSP grid > IFSP Information panel Child > IFSP tab > IFSP grid > IFSP Service Grid > Service Delivery AND Child > IFSP tab > IFSP grid > IFSP Service Grid > Service Delay Reason grid	IFSP is Not a Draft, Closed, Interim, or Canceled. And The Enrollment Service Type is used for Timely Service. And IFSP contains an IFSP Service Record with Authorization # where the First Service Date (from the Attendance table) does not contain a record for this Service Type. And IFSP with			Attendance table entry **made**.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
					Authorization # has a Service Date OR parent Signature Date within 30 Days from the Current Date.			
Timely Service	Delay Reason Needed	If more than 30 days from the date of parental consent, a delay reason must be entered.	**Provider of Record**	Child >IFSP tab > IFSP grid > IFSP Information panel Child > IFSP tab > IFSP grid > IFSP Service Grid > Service Delivery Child > IFSP tab > IFSP grid > IFSP Service Grid > Service Delay Reason grid	IFSP is Not a Draft, Closed, Interim, or Canceled. And The Enrollment Service Type is used for Timely Service. And IFSP contains an IFSP Service Record with Authorization # where the First Service Date (from the Attendance table) does not contain a record for this Service Type And IFSP with Authorization # has a Service Date OR parent Signature Date within 30 Days from the Current Date. And No Delay Reason Entered.			Service Delay Reason Entered.
Timely Service	Confidentiality Letter Due	**365/730/1095 from the date of referral**.	**Muni Data Entry**	Child > Teams tab > EIO/D / Service Coordinator grid > Service Coordinator panel AND Child > Child Info tab > Referral grid > Referral panel	The Referral Is Open and Primary. And The Referral date is within the following days of the current Date. -1 -365 -730 -1095			10 Days Pass given any notification.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Transition	**Potential CPSE eligibility Approaching.** (This alert only triggers during January or July)		**EIO/D**	Child >Transition tab > Eligibility and Transition Dates panel AND Child >Transition tab > Part B eligibility panel	"Notice to CPSE at least 90 days before the child is eligible for 4410 Services" date is within 30 Days. And No Potential Eligibility for Part B services was entered.			Potential Eligibility for Part B services Entered.
Transition	**Transition Conference Approaching**	A transition conference is due to be convened soon.	**EIO/D**	Child >Transition tab > Eligibility and Transition Dates panel AND Child >Transition tab > Part B Eligibility panel AND Child >Transition tab > Transition Meeting Notification panel	"Transition Conference Convened no earlier than" date has passed. And Potential eligibility for Part B services was entered as Yes. And "Parent/Guardian chooses to opt out of written notification being sent to the CPSE of their local school district" = Not checked. And No EI transition Conference was Held.			EI transition Conference Held. Or "Parent/Guardian chooses to opt out of written notification being sent to the CPSE of their local school district" = Checked.
Transition	**Transition Planning Required**	IFSP is closest to the child's 2nd birthday - transition planning is required.	**EIO/D**	Child >IFSP tab > IFSP grid > IFSP Meeting panel AND Child >IFSP tab > IFSP grid > "IFSP Transition" panel	The child is between 2 and 4 Years of age as of Current Date. And The Transition has yet to be discussed with the Family.	Child Menu > 4.5 IFSP Tab > Transition Panel	Has Transition been discussed with the family?	Transition Discussion Entered.

Dashboard Name	Alert Name	Alert Description	Recipient	Trigger Panel	Trigger Field & Rules	Release Panel	Release Field	Release Rule
Children Needing Service Coordinator	EIO/D Assignment is Needed				Teams Panel Does not contain an EIO/D Entry. Or EIO/D has become Inactive. Or EIO/D End Date has Passed. Or EIO/D rejects the Assignment.			EIO/D Assignment occurs.
Children Needing Service Coordinator	SC Assignment is Needed				Teams Panel Does not contain a Service Coordinator Entry. Or The Service Coordinator has become Inactive. Or The Service Coordinator's End Date has Passed. Or The Service Coordinator rejects the Assignment.			Service Coordinator Assignment occurs.
Child Case Close	Potential Case Exiting Needed		EIO/D	Child > IFSP Tab > IFSP Grid	Three (3) years have passed since the child's Date of Birth.			Child Case status = Exited.
Death of Child	Death of Child	If the case is closed with the reason "death of a child," notification should be sent to BEI.	BEI Superuser	Child > Exit Tab > Child Exit/Close Grid	Date of Death Entry is Made.			90 Days Passing Since the Date of Death Entered.
Review 271 Response	Review 271 Response	Date insurance was verified triggers alert to verify upon receipt of a 271 response.	Service Coordinator	Child > Ins Info tab > 271 Response report	271 Response Report has a Policy where matching ID/CIN matches the Insurance Policy Panel. And Insurance Policy Updated.			The last Modified Date occurs After the Date of Data.