

## Transfer, Exit, Close

### How To



1. Transfer a Child's record from the transferring county to the receiving county
2. Request a Child's record be transferred from a Child's previous county to their current county
3. Accept or decline the transfer of a Child's record
4. Exit/Close a Child's record
5. Reopen/Reactivate a Child's record

# Transferring a Child

## Send a transfer

### How To

Transfer a Child's record from current to future county

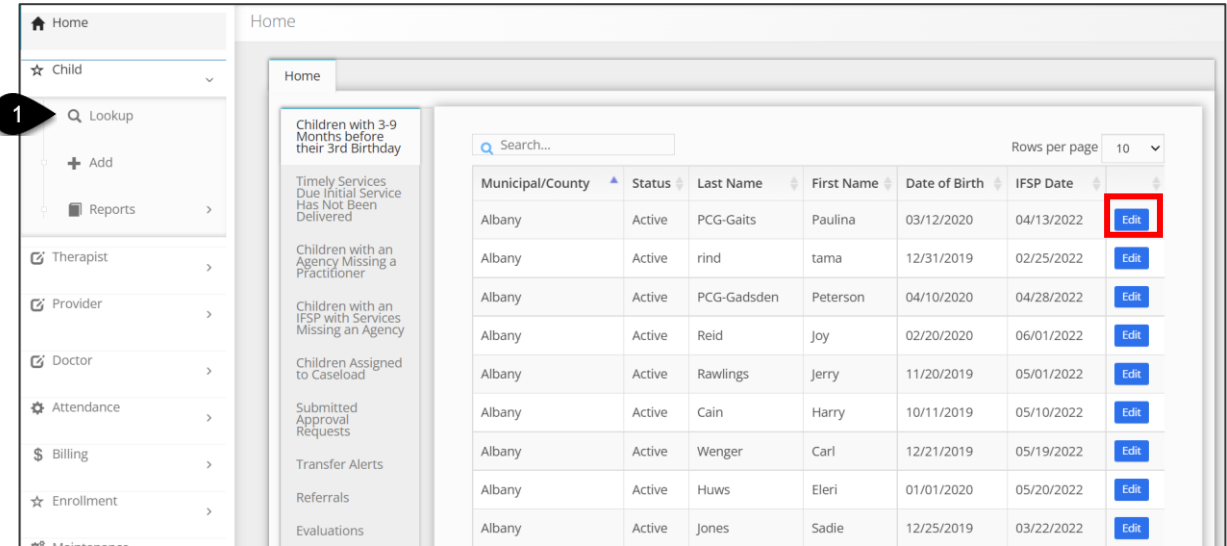
#### Step / Action

1. To initiate the transfer of a Child's record, search for the Child. using the **Child Lookup** functionality\*. Proceed to select and open/edit the Child's record.
2. From the Child's opened record, select the **Transfer, Exit, & Close** tab.
3. Select the **Child Transfer Report** panel.
4. Select **Add Child Transfer** button. The **Child Transfer** pane populates (viewable on the next slide).

*Continued on next page...*

### Note

- Fields with asterisks (\*) are required fields
- For more information on performing a Child Lookup refer to the Child Lookup Job Aid.
- All completed transfer requests appear in the Child Transfer grid.



Home

Child

Lookup

Add

Reports

Therapist

Provider

Doctor

Attendance

Billing

Enrollment

Children with 3-9 Months before their 3rd Birthday

Timely Services Due Initial Service Has Not Been Delivered

Children with an Agency Missing a Practitioner

Children with an IFSP with Services Missing an Agency

Children Assigned to Caseload

Submitted Approval Requests

Transfer Alerts

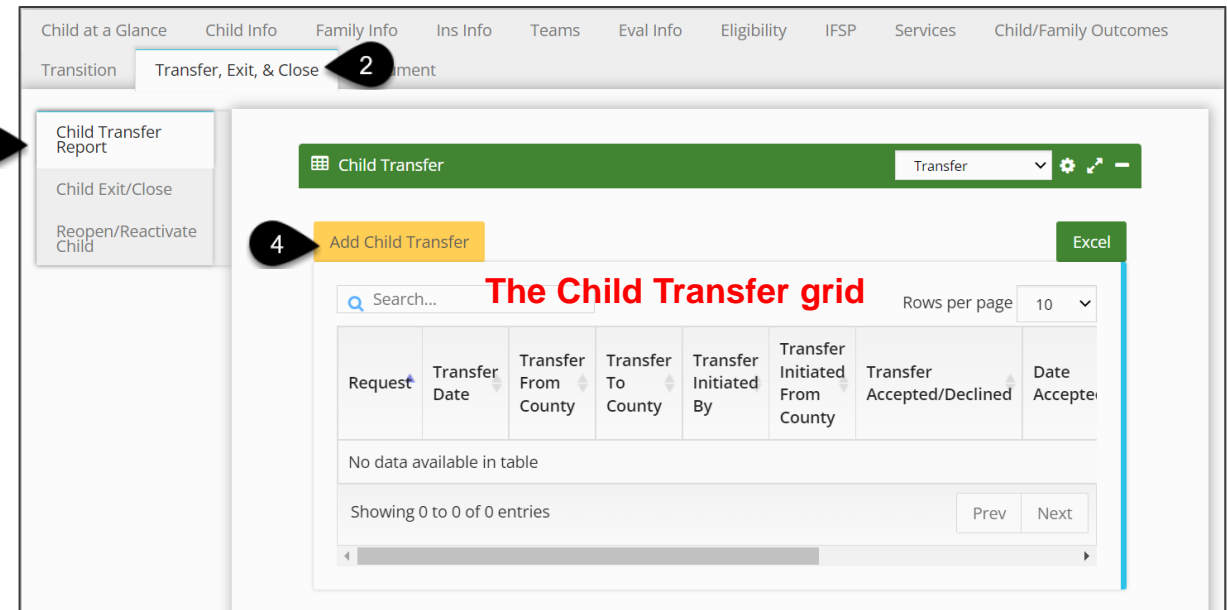
Referrals

Evaluations

Search...

Rows per page 10

Municipal/County	Status	Last Name	First Name	Date of Birth	IFSP Date	Edit
Albany	Active	PCG-Gaits	Paulina	03/12/2020	04/13/2022	Edit
Albany	Active	rind	tama	12/31/2019	02/25/2022	Edit
Albany	Active	PCG-Gadsden	Peterson	04/10/2020	04/28/2022	Edit
Albany	Active	Reid	Joy	02/20/2020	06/01/2022	Edit
Albany	Active	Rawlings	Jerry	11/20/2019	05/01/2022	Edit
Albany	Active	Cain	Harry	10/11/2019	05/10/2022	Edit
Albany	Active	Wenger	Carl	12/21/2019	05/19/2022	Edit
Albany	Active	Huws	Eleri	01/01/2020	05/20/2022	Edit
Albany	Active	Jones	Sadie	12/25/2019	03/22/2022	Edit



Child at a Glance

Child Info

Family Info

Ins Info

Teams

Eval Info

Eligibility

IFSP

Services

Child/Family Outcomes

Transition

Transfer, Exit, & Close

Child Transfer Report

Child Exit/Close

Reopen/Reactivate Child

Child Transfer

Transfer

Add Child Transfer

Excel

Search...

Rows per page 10

Request	Transfer Date	Transfer From County	Transfer To County	Transfer Initiated By	Transfer Initiated From County	Transfer Accepted/Declined	Date Accepted
No data available in table							

Showing 0 to 0 of 0 entries

Prev Next



# Transferring a Child

## Send a transfer

### How To

Transfer a Child's record from current to future county

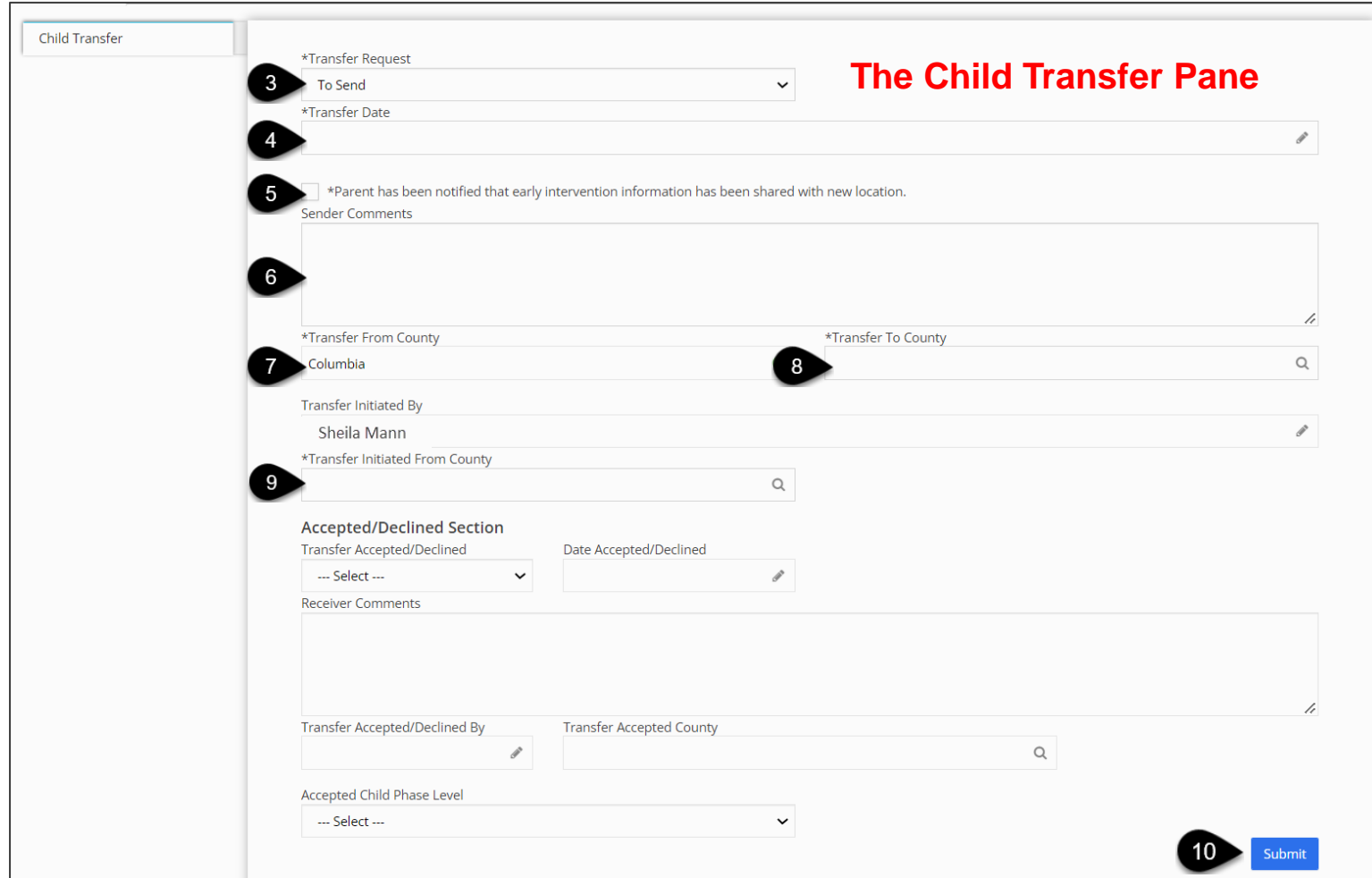
#### Step / Action

3. Select **To Send** from the **Transfer Request** drop-down.
4. Select the **Transfer Date** (today's date) from the **Transfer Date** drop-down.
5. Select the Checkbox to indicate the Parent has been notified.
6. Notes can be entered in the **Sender Comments** text field. (*i.e., family notified us that child will be moving to your county on March 15<sup>th</sup>.*)
7. **The Transfer From County** field prepopulates based on Child's current county.
8. Enter the name of the county the Child is being transferred to in the **Transfer To County** type ahead field.
9. The **Transfer Initiated By** field prepopulates with the user's name.
10. Select the **Submit** button.

Continued on next page...

### Note

- A Child may have multiple transfers (from county to county).
- A Child remains the current county's responsibility until the Child is accepted by receiving county.
- Upon submitting the transfer request, the EIO or EIO/D of the receiving county receives a "Transfer request" alert on their Transfer dashboard. If accepted, most activity related to the sending county will cease (IFSPs service authorizations, etc.), however, billing/claiming activity remains active. If rejected, the request routes back to the county who initiated the request and is marked as a "Transfer Rejected" on the sender's Transfer Dashboard.



**The Child Transfer Pane**

Child Transfer

3 \*Transfer Request  
To Send

4 \*Transfer Date

5 ☐ \*Parent has been notified that early intervention information has been shared with new location.

6 Sender Comments

7 \*Transfer From County  
Columbia

8 \*Transfer To County

Transfer Initiated By  
Sheila Mann

9 \*Transfer Initiated From County

**Accepted/Declined Section**

Transfer Accepted/Declined  
--- Select ---

Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

Transfer Accepted County

Accepted Child Phase Level  
--- Select ---

10 Submit



Please refer to the EI-Hub Case Management User Guide Unit 8.  
Child for more information.



# Transferring a Child

## Requesting a transfer

### How To

Request a Child's record be transferred to your county

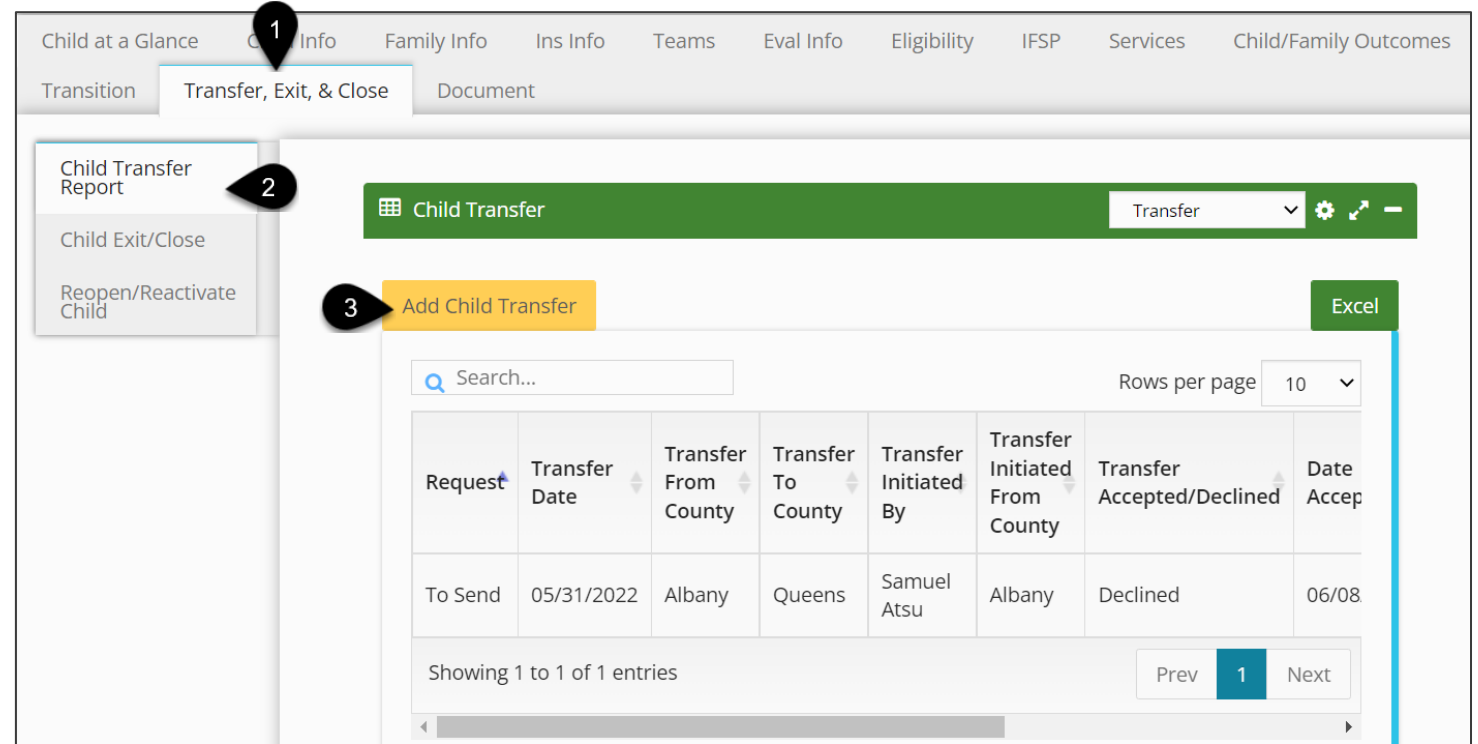
#### Step / Action

1. To initiate the request of a Child's record to your county, Select the **Transfer, Exit, & Close** tab from within the Child's record
2. Select the **Child Transfer Report** panel.
3. Select the **Add Child Transfer** button from the **Child Transfer** grid. The **Child Transfer** pane populates.

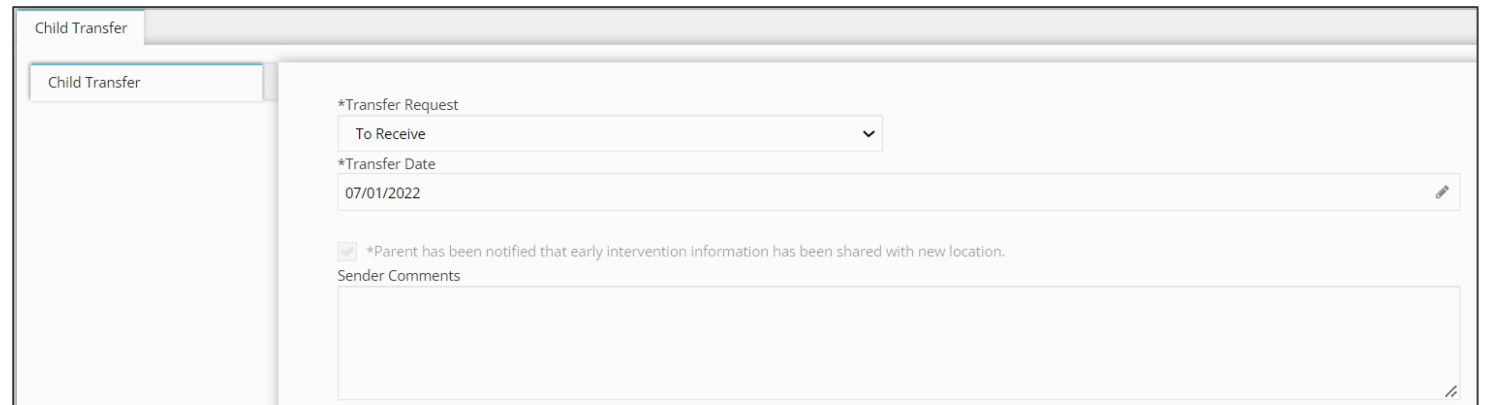
*Continued on next page...*

### Note

- A Child may have multiple transfers (from county to county).
- All completed requests appear in the **Child Transfer** grid.



The screenshot shows the EI-Hub interface with the 'Transfer, Exit, & Close' tab selected. The 'Child Transfer Report' panel is active, displaying a grid of transfer requests. The grid has columns for Request, Transfer Date, Transfer From County, Transfer To County, Transfer Initiated By, Transfer Initiated From County, Transfer Accepted/Declined, and Date Accepted. A single entry is shown: To Send, 05/31/2022, Albany, Queens, Samuel Atsu, Albany, Declined, 06/08. The 'Add Child Transfer' button is highlighted in yellow. The 'Child Transfer' pane is also visible, showing a search bar and a table with the same data.



The screenshot shows the 'Child Transfer' form with the 'Child Transfer' tab selected. The form contains a 'Transfer Request' section with a dropdown menu for 'To Receive' and a text field for 'Transfer Date' (07/01/2022). There is a checkbox for '\*Parent has been notified that early intervention information has been shared with new location.' and a text area for 'Sender Comments'.

# Transferring a Child

## Requesting a transfer

### How To

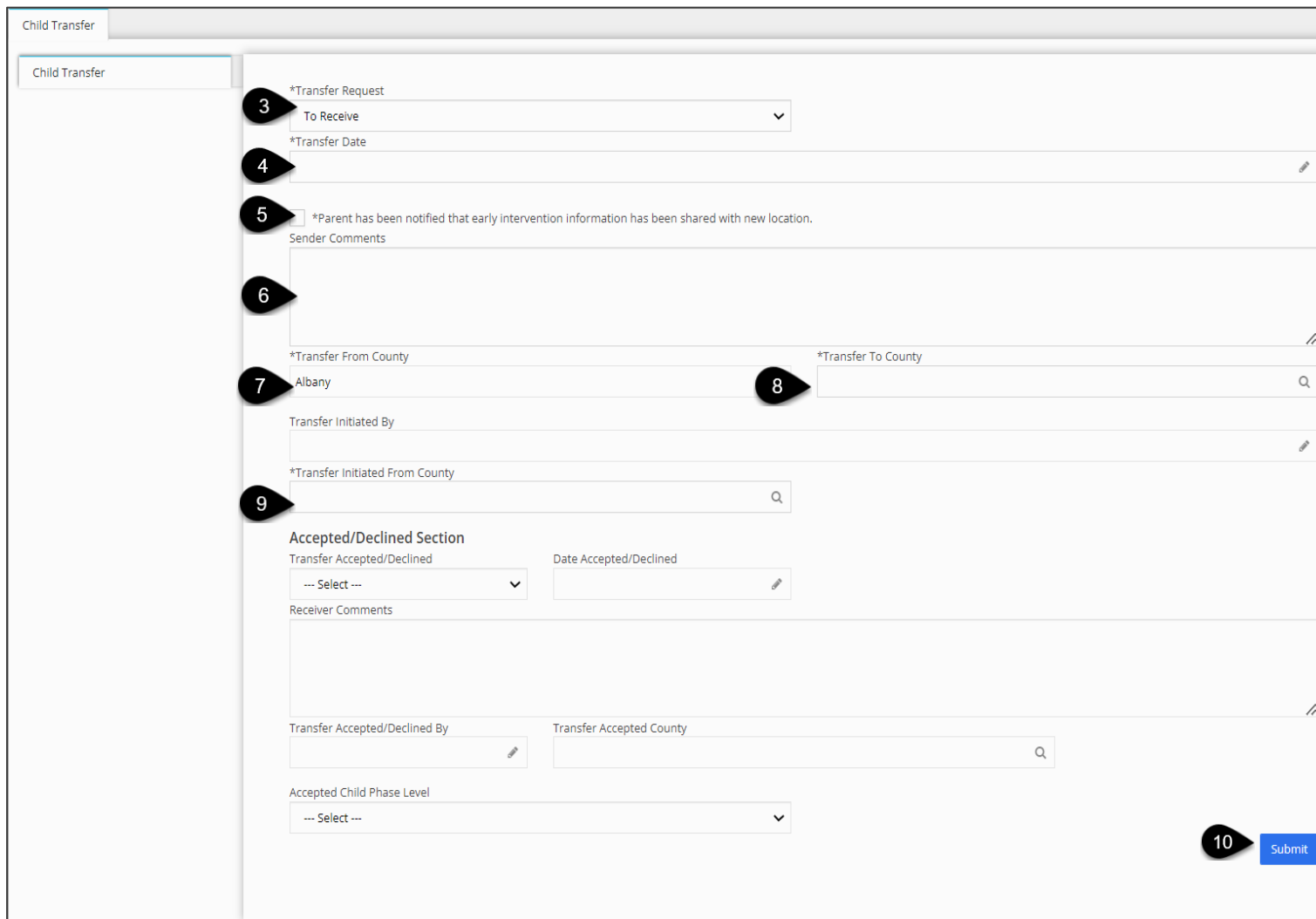
Request a Child's record be transferred to your county

#### Step / Action

3. Select **To Receive** from the **Transfer Request** drop-down.
4. Select the Transfer Date (today's date) from the **Transfer Date** field.
5. Select the Checkbox to indicate the Parent has been notified that EIP information has been shared.
6. Enter notes into the **Sender Comments** text field (i.e., *family notified us that the child has relocated to our county on March 14<sup>th</sup>*).
7. The **Transfer From County** field prepopulates based on child's home county.
8. Select the appropriate county from the **Transfer To County** type ahead field.
9. The **Transfer Initiated By** field prepopulates with the user name.
10. Select the **Submit** button.

### Note

- Users assigned the MuniTransferNY role in Case Management are the only users who can request, approve, and accept Child transfers from other municipalities.
- The requesting county (those with the MuniTransferNY role only) has limited access to the Child's record for whom the request has been made. The requesting county can only view the **Child Transfer** tab of the Child's record.



The screenshot shows the 'Child Transfer' form with the following fields and steps:

- 3**: \*Transfer Request dropdown menu, with 'To Receive' selected.
- 4**: \*Transfer Date field.
- 5**: Checkbox for '\*Parent has been notified that early intervention information has been shared with new location.'
- 6**: Sender Comments text area.
- 7**: \*Transfer From County dropdown menu, showing 'Albany'.
- 8**: \*Transfer To County type-ahead field.
- 9**: \*Transfer Initiated From County type-ahead field.
- Accepted/Declined Section**:
  - Transfer Accepted/Declined dropdown menu (--- Select ---).
  - Date Accepted/Declined field.
  - Receiver Comments text area.
  - Transfer Accepted/Declined By field.
  - Transfer Accepted County type-ahead field.
  - Accepted Child Phase Level dropdown menu (--- Select ---).
- 10**: Submit button.

# Transferring a Child

## Accepting or Declining a Transfer

### How To

Accept a transfer as a receiving county

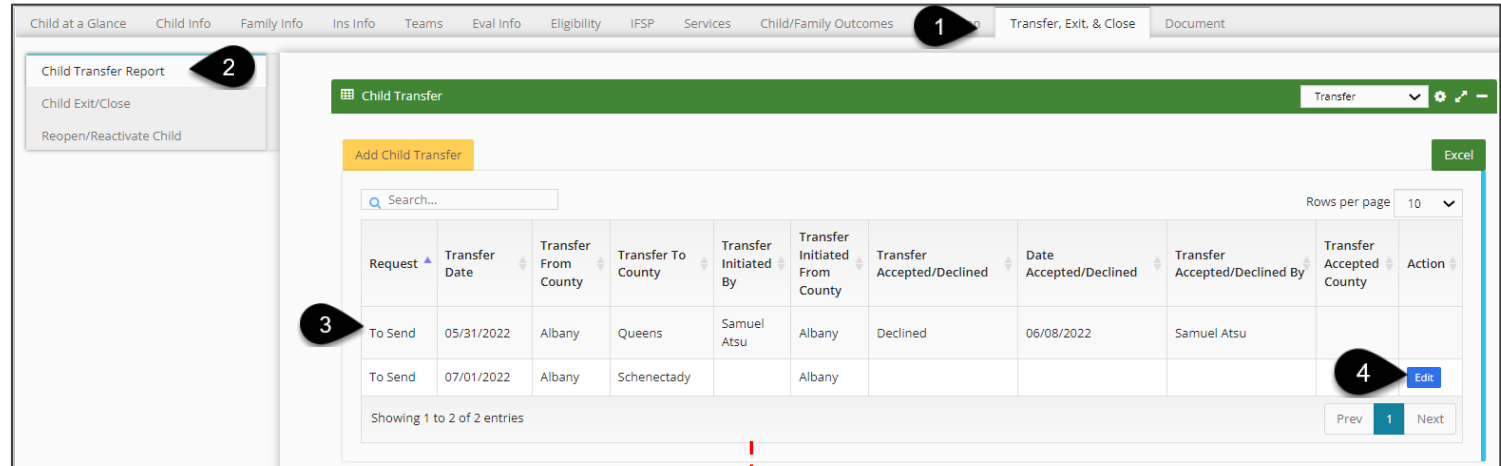
#### Step / Action

1. To accept a Child's record, select the **Transfer, Exit, & Close** tab.
2. Select the **Child Transfer Report** panel. The Child Transfer grid opens.
3. Locate the appropriate request for editing (i.e., To send).
4. Select **Edit**. The **Child Transfer** pane populates.

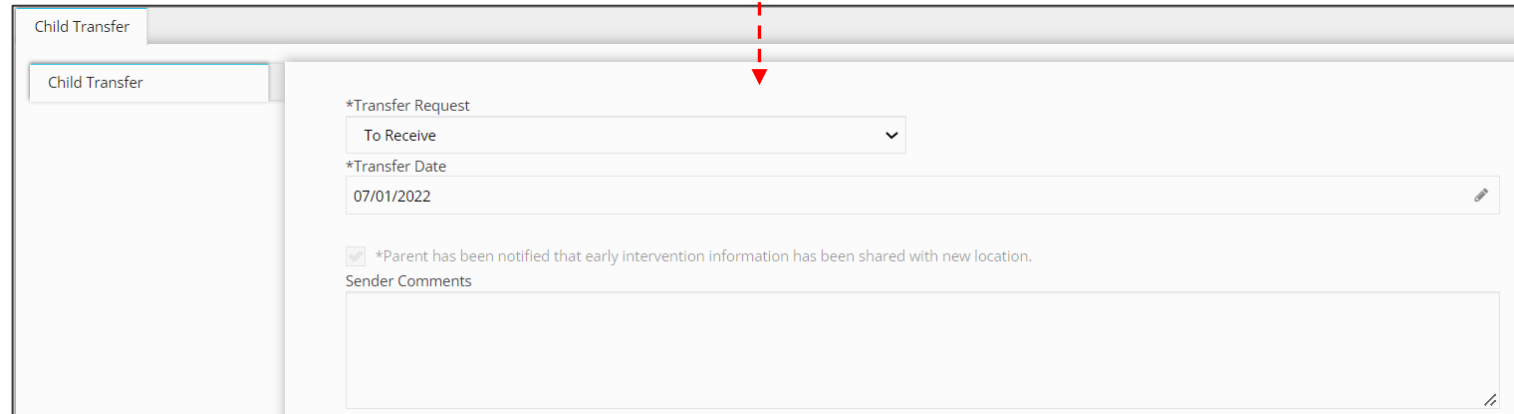
Continued on next page...

### Note

- All completed requests appear in the **Child Transfer** grid.



Request	Transfer Date	Transfer From County	Transfer To County	Transfer Initiated By	Transfer Initiated From County	Transfer Accepted/Declined	Date Accepted/Declined	Transfer Accepted/Declined By	Transfer Accepted County	Action
To Send	05/31/2022	Albany	Queens	Samuel Atsu	Albany	Declined	06/08/2022	Samuel Atsu		
To Send	07/01/2022	Albany	Schenectady		Albany					Edit



Child Transfer

\*Transfer Request  
To Receive

\*Transfer Date  
07/01/2022

☒ \*Parent has been notified that early intervention information has been shared with new location.

Sender Comments

# Transferring a Child

## Accepting or Declining a transfer

### How To

Accept or decline a transfer as a receiving county

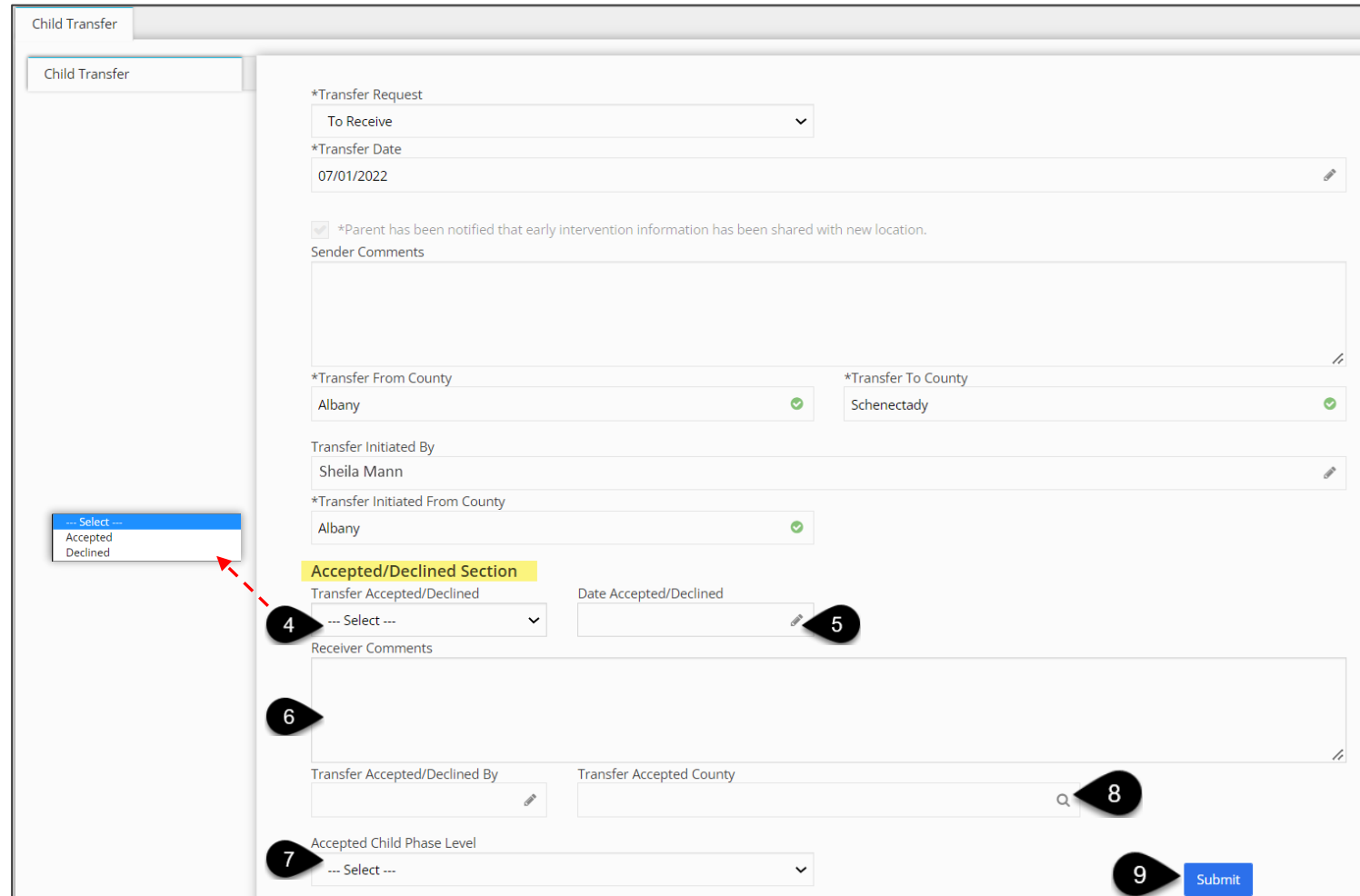
#### Step / Action

4. The EIO selects **Accept** or **Decline** from the **Transfer Accepted/Declined** drop-down.
5. The date prepopulates within the **Transfer Date** field.
6. Add **Comments**, if applicable, within the **Receiver Comments** field.
7. The **Transfer Accepted/Declined By** field prepopulates with the current user's name.
8. Select the appropriate county from the **Transfer Accepted County** type ahead field.
9. Select the **Submit** button.

*Continued on next page...*

### Note

- A Child remains the current county's responsibility until the Child is accepted by receiving county.
- If accepted, most activity related to the sending county will cease (IFSPs service authorizations, etc.), however, billing/claiming activity remains active.
- If rejected, the request routes back to the county who initiated the request and is marked as a "Transfer Rejected" on the sender's Transfer Dashboard. The Child's case remains active in the original county, along with the IFSP and service authorizations.



The screenshot shows the 'Child Transfer' form. On the left, a dropdown menu is open, showing options: '--- Select ---', 'Accepted', and 'Declined'. A red arrow points from callout 4 to this menu. Callout 5 points to the 'Date Accepted/Declined' field. Callout 6 points to the 'Receiver Comments' text area. Callout 7 points to the 'Accepted Child Phase Level' dropdown. Callout 8 points to the 'Transfer Accepted County' type-ahead field. Callout 9 points to the 'Submit' button.

**Child Transfer**

\*Transfer Request  
To Receive

\*Transfer Date  
07/01/2022

☒ \*Parent has been notified that early intervention information has been shared with new location.

Sender Comments

\*Transfer From County  
Albany

\*Transfer To County  
Schenectady

Transfer Initiated By  
Sheila Mann

\*Transfer Initiated From County  
Albany

**Accepted/Declined Section**

Transfer Accepted/Declined  
--- Select ---

Date Accepted/Declined

Receiver Comments

Transfer Accepted/Declined By

Transfer Accepted County

Accepted Child Phase Level  
--- Select ---

**Submit**

# Child Exit/Close

## Exit/Close

### How To

#### Exit/Close a Child's Record

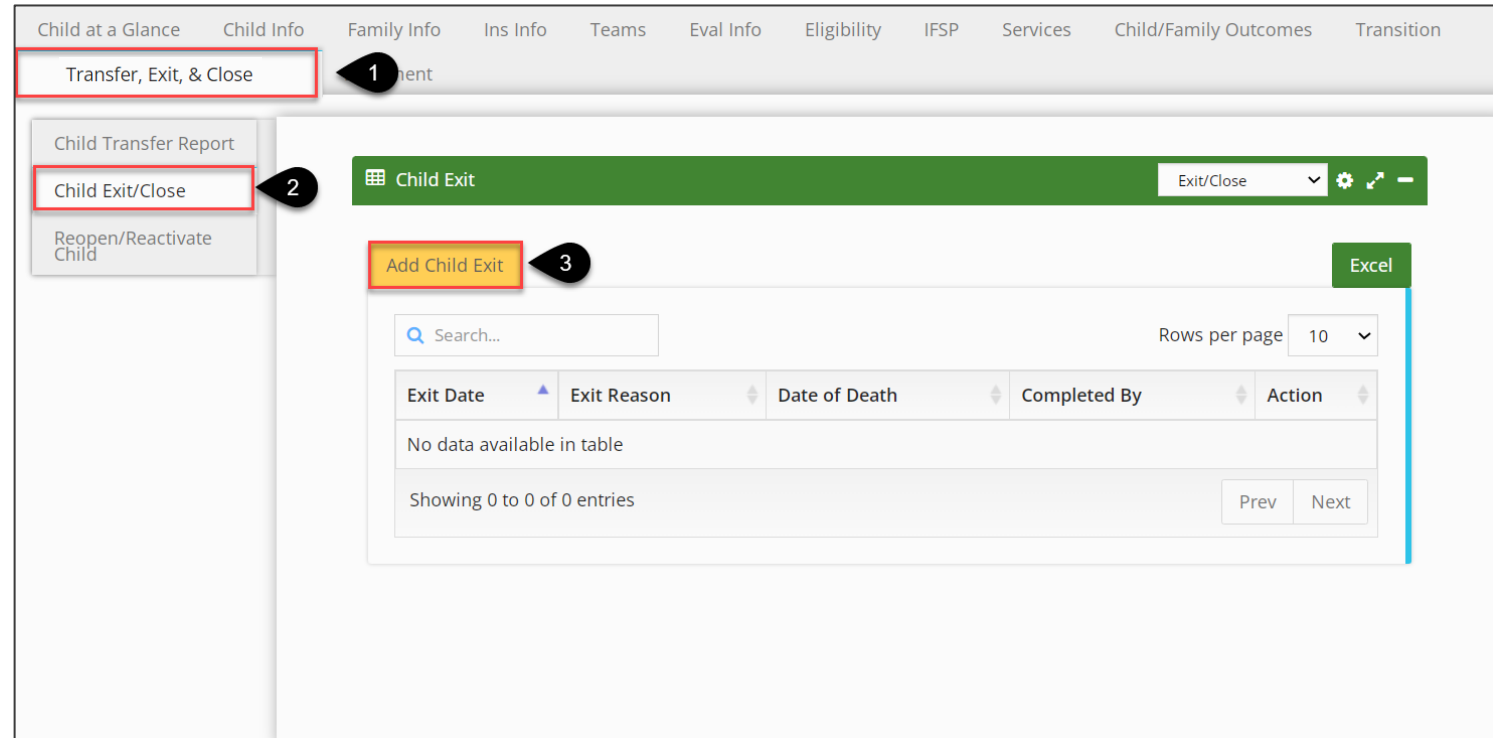
#### Step / Action

1. Select the **Transfer, Exit, & Close** tab.
2. Select the **Child Exit/Close** panel.
3. Select the **Add Child Exit** button. A Child's status changes from Exit to Close after 5 years.

*Continued on next page...*

### Note

- All completed requests display in the **Child Exit** grid.
- When a child is exited from a program, the Child's record is locked from editing; however, the Child's record may be reopened by the EIO, EIO/D, or County Data Entry for modification and re-closed.
- An EIP Child record will close automatically after 5 years and 8 months of age.
- An At-Risk Child record will close automatically after 36 months of age.
- The Child Exit area is used for federal reporting purposes.



The screenshot displays the EI-Hub Case Management User Guide interface. The top navigation bar includes tabs for 'Child at a Glance', 'Child Info', 'Family Info', 'Ins Info', 'Teams', 'Eval Info', 'Eligibility', 'IFSP', 'Services', 'Child/Family Outcomes', and 'Transition'. The 'Child Info' tab is selected, and the 'Transfer, Exit, & Close' sub-tab is highlighted. In the left sidebar, the 'Child Exit/Close' option is selected. The main content area shows the 'Child Exit' section, which includes an 'Add Child Exit' button and a table with columns: 'Exit Date', 'Exit Reason', 'Date of Death', 'Completed By', and 'Action'. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A search bar and 'Rows per page' dropdown are also visible.



# Child Exit/Close

## Exit/Close

### How To

#### Exit/Close a child

#### Step / Action

4. Select the **Exit Date** from the **Exit Date** field.
5. Select the appropriate **Exit Reason** from the **Exit Reason** field.
6. Select the Child's **Date of Death**, if applicable.
7. The **Completed By** field automatically prepopulates with the current user's name.
8. Select **No** or **Yes** to indicate if the child was referred to **At-Risk Developmental Surveillance**.
9. Select the **Submit** button.

--- Select ---

Attempts to contact unsuccessful  
 Child Deceased (must enter date of death)  
 Duplicate record for this child (excluded from federal reporting)  
 EI Evaluation found child not eligible (cannot have been found eligible or had an auto qualifying diagnosis)  
 Moved out of state  
 No longer eligible for Part C prior to reaching age three (child must have had an Initial or later IFSP and received services on these IFSPs)  
 Not eligible for Part B, exit with no referrals (cannot have been found Part B eligible or eligibility not determined)  
 Not eligible for Part B, exit with referrals to other programs (cannot have been found Part B eligible or eligibility not determined)  
 Part B eligibility not determined (cannot not have been found Part B eligible)  
 Part B eligible, exiting Part C (cannot have been found not Part B eligible or eligibility not determined)  
 Record Modification (excluded from federal reporting; does not alter original exit reason/date)  
 Withdrawal by parent (or guardian)Withdrawal by parent (or guardian)

#### Child Exit/Close

#### Child Exit/Close

\*Exit Date

4

05/12/2022

\*Exit Reason

5

Withdrawal by parent (or guardian)

Date of Death

6

Closure Amendment

CC1 Superseded

Amendment Comment

Completed By

7

Samuel Atsu

\*Was the child referred to At-Risk Developmental Surveillance?

8

No

9

Submit

# Child Exit/Close

## Reopen/Reactivate Child Record

### How To

Reopen/Reactivate a Child's record

#### Step / Action

1. Select the **Transfer, Exit, & Close** tab.
2. Select the **Reopen/Reactivate Child** panel.
3. Select the **Add Reopen/ Reactivate** button.
4. The username will automatically populate in the **Case Reopened/ Reactivated By** field.
5. Select **Reopened/Reactivation Reason** from the **Reopened/ Reactivation Reason** drop-down.
6. Complete the **If Other, Please Explain** field, if applicable.
7. Complete the **If Modification to Child Record** field, if applicable.
8. Enter the **Reopen/Reactivation** date into the **Reopen/Reactivation Date** field.
9. Enter **Comments** into the **Comment text field**, if applicable
10. Select the **Submit** button.

### Note

- When a child is exited from a program, the Child's record is locked from editing; however, it may be reopened by the EIO, EIO/D, or County Data Entry for modification and reclosed.
- If a child is re-referred, the child will need to be reopened. A re-referral occurs when a child had been previously referred and exited the EIP.
- Please perform a Child Lookup to ensure duplicate children are not entered.

