

EI Hub Cheat Sheet:

Accepting a Transfer:

1. Choose User Profile (MuniProgAllNY)

2. On your Home Screen select the Dashboard/Tab on the left-hand side

a. Select *Dashboard Alert (Equal To): Incoming Transfer

i. Select

b. Any incoming transfers will be listed in the table below. Select to enter the Child's Chart.

3. Select Tab across the top of the Child's Chart.

a. Select Tab along the left-hand side

i. The transfer should be listed in the table. Find the transfer and select

ii. Complete the Accepted/Declined Section

1. Transfer Accept/Declined

Graphical user interface, application Description automatically generated

2.
Date Accepted/Declined

iii. Select

The child will now be in Saratoga County. Refer to EI Hub Cheat Sheet Entering a New Child/Referrals to assign the EIO/D and Service Coordinator for the Child. Record of this transfer will be in the table under the Child Transfer tab.

Requesting a Transfer:

If a referral is received for a child who has a case that is housed in another county, please enter the child as reference in EI Hub Cheat Sheet Entering a New Child/Referrals. If the child does not come up when searching (because they are out of county) continue with entering Basic Demographic Information about the child. Once you have submitted the basic demographic information (before the referral is added) a pop-up window will let you know that the child already has an EI Hub chart housed in another county. Select to continue using this child's chart.

1. Choose User Profile (MuniProgAllNY)

2. Follow steps on EI Hub Cheat Sheet Entering a New Child/Referrals to add a new Child. After adding the basic demographic information for the child a pop-up will show you if a

Child has a chart existing in a different county and what percentage of a match it is. If the information matches this child, continue to the next step.

Graphical user interface, application Description automatically generated

3.

Select

Graphical user interface, text, application, email Description automatically generated

4.

Complete the Child Transfer Pop-up as indicated

- a. Transfer Request: To Receive
- b. Transfer Date: Today's Date
- c. Check the box *Parent has been notified that early intervention information has been shared with new location
- d. Transfer Initiated By: will auto-populate with your name

5. Select

Once the County completes the transfer request the child will appear in the Dashboard Transfer Alerts under Incoming Transfer. Accept the Transfer by following the steps for Accepting a Transfer above. Once the Transfer is accepted the Referral can be inputted along with additional/updated information and the EIOD and ISC can be assigned.