Unit 7:
Transfers & Transitions

Version 4.6

This page intentionally left blank.

Document Revision History

Date	Release	Description
6/14/2016	4.6	• No Changes
4/26/2016	4.5.2	• No Changes
2/24/2016	4.5.1	• No Changes
12/15/2015	4.5	• No Changes
10/27/2015	4.4	• No Changes
9/22/2015	4.3	• No Changes
8/26/2015	4.2	• No Changes
11/4/2014	4.01	• No changes
1/16/2014	3.2.1	• No changes
4/15/2013	2.1	• No changes
4/1/2013	2.0	• No changes
3/4/2013	1.6.2.1	• No changes
2/14/2013	1.6.2	• No changes
7/19/2012	1.6.1	• No changes
6/4/2012	1.6	• Updated the **Creating a NYS Municipality Transfer for a Child when Informed Written Parental Consent is Given** topic.
10/24/2011	1.5	• Updated **Transfers** topic.
6/24/2011	1.4	• Replaced 'My Cases' screen shots. • Updated **Transfers** topic. • Updated **Creating Municipality Transfers** subtopic • Removed **Out of State Transfer** topics. • Updated the **Editing a Transfer** subtopic.
3/28/2011	1.3	• No changes.
1/31/2011	1.2	• No changes.
11/22/2010	1.1	• No changes.
11/2/2010		• **Creating a NYS Municipality Transfer for a Child** – added instructions for completing a transfer when the parent / guardian objects to notification to the receiving municipality. • **Creating a Committee on Preschool Special Education Transition for a Child** – added reference to Appendix L New York State EIP Opt-Out Procedures.
10/1/2010	1.0	• October 2010 NYEIS launch.

Table of Contents

This page intentionally left blank.

Transfers & Transitions

Unit Overview

This unit covers children leaving the Early Intervention Program (EIP) either *Transferring* to another Municipality or *Transitioning* out of the EIP.

Transfers

NYEIS has the ability to assist Municipalities in transferring a Child's information when the Child moves to another Municipality. If a Child will be moving, the current Municipality can initiate a Transfer through NYEIS and inform the new Municipality of the Child's expected move date (only minimal information is exchanged). The Child's entire record can be shared with the new Municipality when informed written parental consent is given. If informed written consent is obtained, the former Municipality must close all Open Tasks, and then initiates the Transfer using functionality on the Integrated Case home page. The Child's Integrated Case *must* be left in **Draft** status in order for the new Municipality to access the Child's records.

If the parent does not consent to transfer the records, the former Municipality records the Transfer in the Child's Integrated Case, and the system automatically creates a Task for the Child's EIO/D to close the child's Integrated Case with reason of Municipality Transfer. The new Municipality subsequently enters the Child as a New Referral. 📖 *See* **Unit 2: Referral & Intake,** *Creating a Municipal Referral* for further information.

If the EIO/D in the new Municipality and the family agree to continue the current service package, a new IFSP will be created by the new Municipality; the IFSP type will be an additional IFSP of the same type in the new municipality. **PLEASE NOTE:** If the new IFSP in the new municipality is an initial IFSP, NYEIS looks to the child's initial referral date when determining if the initial IFSP is past the 45 day timeline and requires entry of a late reason. In these transfer instances the new municipality **MUST** enter the 45 day late reason as "Family unresponsive/moved" in order to submit the new initial IFSP.

If the parents consented to the child's record being shared with the new Municipality, a new IFSP will be created with a new effective start date from the date the new additional IFSP is created. New IFSP dates recorded by the new municipality will be consistent with the previous IFSP dates created by the former Municipality. If the EIO/D and family agree that changes need to be made to the IFSP from the transferring municipality, the new IFSP can include the new services agreed upon. This can include supplemental evaluations if the parent and EIO/D feel that additional evaluations are needed.

If a Municipality receives a Referral and discovers that the Child is *active* in another Municipality, the new Municipality should contact the former Municipality and coordinate a Transfer of the Child's Integrated Case.

Transitions

Early Intervention Program regulations require that every Child leaving the EIP have a Transition plan to programs under Section 4410 of Education Law (Committee on Preschool Special Education (CPSE)) or to other early childhood services. NYEIS captures the Transition plan in the IFSP and Transition data required for federal reporting purposes on the Child's Integrated Case.

The **Transition Services** section of the IFSP captures details regarding required transition steps and services for the Child and family. Details *must* be captured as a result of the IFSP meeting(s) in which Transition (either to the Committee on Preschool Special Education (CPSE) or to other programs and services) is discussed with the family.

On the Child's Integrated Case, the **Transition to CPSE** *must* be completed whether or not the Child is thought to be eligible for CPSE services. If the Child is not thought to be eligible (no notification or subsequent Referral to the CPSE will be made), the first field **Is CHILD POTENTIALLY ELIGIBLE FOR CPSE SERVICES?** should be entered as **No** and a **Transition to Other Program** should be completed.

For a Child thought eligible for CPSE, a **Transition to CPSE** *must* be completed. The first field **IS CHILD POTENTIALLY ELIGIBLE FOR CPSE SERVICES?** should be entered as **Yes** and all the remaining fields on the page *must* be completed.

TRANSFERS

Transfers occur when a Child is transferring from one Municipality to another. A Child's Integrated Case can be transferred regardless of whether the IC is currently in **Draft** (Open) status, or in **Closed** status.

If the Child's Integrated Case is in **Draft** status at the time of the transfer, the active IFSP and associated SAs are automatically closed during the transfer process, as long as all open Tasks associated with the IFSP/SAs are closed.

After the Transfer is completed, the transferring municipality will continue to have access to all Service Authorizations associated with the transferred child that were created by the municipality. The municipality accesses these SAs using the Service Authorizations search feature, searching on the child's name or the SA number.

Claims for SAs created by the transferring municipality can be processed after the transfer has been completed.

Important Information
- The transferring municipality **loses all access to the Child Home page, Integrated Case Home page, and all IFSPs they created** after the Transfer is completed.
- The transferring municipality must record the transfer details in the Transfer section of the active IFSP prior to initiating the transfer.

Transfers Page Review

❶ **Transfers** button – displays on the Navigation Bar of an **Integrated Case Home** page. Click **Transfer** button to access **Transfers** page.

❷ **New** button – displays on **Transfers** page. Allows User to create a new Transfer.

❸ **Body** – displays a list of Transfers that can be viewed or updated.

Creating a NYS Municipality Transfer for a Child when Informed Written Parental Consent is Given

When the Parent gives informed written consent to the Transferring Municipality to notify the Receiving Municipality of the transfer **and** to transfer the Child's records, the Transferring Municipality User will follow the steps below to process the Transfer.

Important Information
- Before creating and saving the Transfer record, the User should first record the transfer information in the Transfer section of the Child's IFSP if one is active. The IFSP cannot be edited after the Transfer is initiated following these steps. 📖 *See* **Unit 6: IFSP and SAs,** *Editing an IFSP* section for further information.
- All open Task(s) associated with the active IFSP and associated SAs must be actioned (closed). 📖 *See* **Unit 1: Getting Started,** *Working with Tasks* section and **Unit 4: Case Management,** *Tasks (Open Tasks Summary)* section for further information
- If the Municipality Transfers an Integrated Case that is currently in 'Closed' status, the IFSPs or SAs associated with the IC would also be in 'Closed' status. Therefore, steps 3 through 7 would not be required.
- After the transfer is initiated and the receiving county accepts the transfer, no MDE's that were completed in the child's former county can be reopened / corrected.

---

1. Click **My Cases** from the Menu Bar. **My Cases** page displays with a list of Child Cases.

2. Click Child **Case Reference** link number. **Integrated Case Home** page for the Child displays.

3. Click the **Tasks** link on the Navigation Bar. The **Open Task Summary** page displays.

If Tasks are listed, each one must be actioned (Closed) prior to the Transfer.
📖 *See* **Unit 4: Case Management,** *Tasks (Open Tasks Summary)* section to learn how to determine who currently owns the Task so that you can contact the agency or person and ask them to complete the Task.

4. After every Task is actioned, the **Open Task Summary** page will not display any tasks. You can then proceed with the Transfer.
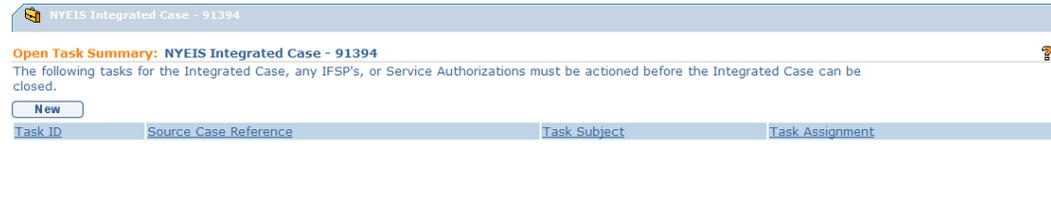
5. Open the **Integrated Case Home** page for the Child to be Transferred. Click the **Transfers** option on the left navigation menu.

6. The **Transfers** page displays.

7. Select **New** button. **Create NYS Municipality Transfer** page displays with the following sections: **Child Details**, **Municipality Receiving Transfer** and **Comments**.

8. Complete all of the fields in the **Municipality Receiving Transfer** section.
    Navigate from field-to-field using **Tab** key to enter information. *Date fields
    must be formatted as **mm/dd/yyyy** format.*

9. In order to Transfer the child's Integrated Case to the Receiving Municipality
    selected in the **Municipality** field, the following conditions must be met:

    - The 'Has parent/legal guardian objected to notification to the receiving
      municipality?' field must be 'No'

    - The 'Parental Consent to Transfer Child's Records' field must be
      'Yes'

    Important Information
    Any other combination of responses in the 'Has parent/legal guardian objected
    to notification to the receiving municipality?' field and the 'Parental Consent
    to Transfer Child's Records' fields will prevent the Child's Integrated Case
    record from being transferred to the designated municipality. In addition, the
    system will automatically initiate a Close Case Task when the Transfer record
    is saved. 📖 *See **Creating a NYS Municipality Transfer for a Child when
    Parental Consent is Not Given** for further information.*

    Record the date that you received notice from the parent that the child is being
    relocated to the new Municipality in the **Notification Date** field.

    Record a date in the **Transfer Date** field that reflects the date that the child
    relocated to the new Municipality. This date will be displayed in the Task
    created for the Receiving Municipality. The receiving municipality will have
    the ability to enter the actual date of transfer if it is different than the date that
    was entered.

> **Important Information**
> The **Transfer Date** cannot be future dated. The Transfer Date field represents the confirmed date that the child relocated out of the municipality. If the date cannot be confirmed, it should be approximated based on the notification received from the family or by the receiving municipality.

10. Click the **Save** button. The Transfers list page displays with the new Transfer record.

The **Parental Objection?** field displays 'No' to indicate that the parents have not objected to the notification to the new Municipality and to the transfer of records. The **Notification Status** field displays 'Pending' to indicate that a Transfer was initiated but that the Receiving Municipality has not accepted the Transfer. The **Transfer Date** field reflects the date recorded in the Transfer record.

11. The system automatically creates a Task in the Receiving Municipality's EIO/D Work Queue to review and accept the Transfer.

12. The Transfer record is updated based on the Receiving Municipality's response:

- If the Transfer is accepted, the **Notification Status** field will display 'Accepted', and the Child's record will no longer display in the EIO/D's **My Cases** page.

- If the Transfer is rejected, the **Notification Status** field will display 'Rejected'. In addition, the Child's record will continue to be listed in the EIO/D's **My Cases** page.

Action	Transferring Municipality	Receiving Municipality	Transfer Date	Notification Status	Parental Objection?
View Edit	Albany	Rensselaer	6/2/2011	Rejected	No

NYEIS Integrated Case - 77842
Transfers: NYEIS Integrated Case - 77842
New

> **Important Information**
> If the Receiving Municipality **Rejects** the Transfer, the system will not close the active IFSP and associated SAs.

Notes:

- The saved **Create NYS Municipality Transfer** page initiates a Task to the receiving municipality's **EIO/D Work Queue** where a user assigned to this work queue views the transfer details and accepts or rejects the transfer. 📖 *See **Receiving a NYS Municipality Transfer for a Child Transfers** section for further information. Accepting the transfer causes a new Task to be created in the Municipality's **New Case** work queue to initiate the assignment of an EIO/D and Initial Service Coordinator. 📖 See **Unit 2: Referral and Intake** for further information about new case Intake.

- The **Integrated Case home** page **Transfers** section displays a list of all Transfers in a Child's history.

- Transfers can be edited **prior** to being accepted by the Receiving Municipality by clicking the **Edit** button from the view page or the **Edit** link on **Transfers** page. 📖 *See **Editing Transfers** section for further information.

- Transfers can be "cancelled" **prior** to being accepted by the Receiving Municipality by clicking on the **Edit** button from the view page or the **Edit** link on the **Transfers** page and editing information related to parental objection to notification and parental consent to transferring records. Editing this information to indicate that the parent objected to the notification and that the parent did not consent to the transfer of records will in essence, "cancel" the transfer and remove the Transfer Acceptance Task from the EIO/D work queue in the receiving municipality. 📖 *See **Editing Transfers** section for further information.

Creating a NYS Municipality Transfer for a Child when Parental Consent is Not Given

When the Parent does <u>not</u> consent to the Transferring Municipality notifying the Receiving Municipality of the transfer **and/or** to transfer the Child's records, the Transferring Municipality User will follow the steps below to record the Transfer. After the Transfer record is saved the system will automatically initiate a

Workflow Task to close the Child's Integrated Case, and all active IFSP's and SA's,

1. Click **My Cases** from the Menu Bar. **My Cases** page displays with a list of Child Cases.

2. Click Child <u>**Case Reference**</u> link number. **Integrated Case Home** page for the Child displays.

3. Click **Transfers** from the Navigation Bar. **Transfers** page displays.

4. Select **New** button. **Create NYS Municipality Transfer** page displays with the following sections: **Child Details**, **Municipality Receiving Transfer** and **Comments**.

5. Complete all of the fields in the **Municipality Receiving Transfer** section. Navigate from field-to-field using **Tab** key to enter information. *Date fields must be formatted as **mm/dd/yyyy** format.*

6. Select the **Municipality** that the parent has indicated that they are moving to. Complete the 'Has parent/legal guardian objected to notification to the receiving municipality?' field and the 'Parental Consent to Transfer Child's Records' field.

   Record the date that you received notice from the parent that the child is being relocated to the new Municipality in the **Notification Date** field.

   DO NOT record a date in the **Transfer Date** field because the parent has not consented to Notify the new Municipality and/or Transfer the Child's records.

7. Click the **Save** button. The Transfers list page displays with the new Transfer record.

   The **Parental Objection?** field displays 'Yes' to indicate that the parents have objected to the notification to the new Municipality and/or transfer of records. The **Notification Status** field displays 'No Transfer' to indicate that a Transfer was not initiated.

8. The system automatically creates a 'Close Case' Task in the EIO/D's Assigned Task inbox to close the child's Integrated Case.

   Notes:

   - If the parent objected to the notification and did not consent to transfer the record, the new municipality must process the referral as a new referral.

Editing a Transfer

A Transfer record can be edited as long as the Transfer has not been accepted or rejected by the Receiving Municipality, or the Integrated Case has not been closed.

1. Click **My Cases** from the Menu Bar. **My Cases** page displays with a list of Child Cases.

2. Click Child **Case Reference** link number. *Be sure to select NYEIS Integrated Case for Case Type*. **Integrated Case Home** page for Child displays.

3. Click **Transfers** from the Navigation Bar. **Transfers** page displays.

4. Click **Edit** link under **Action** column for specific Transfer to change. **Modify** page displays.

   Several different scenarios are possible:

   The Parents Initially Consented to the Transfer, but now do not Consent

   In this scenario the current Transfer record would indicate that parents did not object, and that the Notification Status is 'Pending'. The Receiving Municipality has received a Transfer Acceptance task in their EIO/D Work Queue.

Action	Transferring Municipality	Receiving Municipality	Transfer Date	Notification Status	Parental Objection?
View Edit	Albany	Monroe	7/8/2011	Pending	No

   Click the Edit button in the Action column next to the current record. The **Modify NYS Municipality Transfer** page displays.

Modify NYS Municipality Transfer: NYEIS Integrated Case - 58664			

Save   Cancel

Child Details

Child's Name:	ISC Test		Date of Birth:	3/1/2011
Transfer Date:				

Municipality Receiving Transfer

Municipality:	Monroe
*Has parent/legal guardian objected to notification to the receiving municipality?:	No
Parental Consent to Transfer Child's Records:	Yes
Notification Date:	
Notification Status:	Pending
Transfer Date:	7/8/2011

Comments

Save   Cancel

Apply necessary changes to the **Has parent/legal guardian objected to notification to the receiving municipality?** field and/or the **Parental Consent to Transfer Child's Records** field. Delete the date recorded in the **Transfer Date** field. Click the **Save** button. The Transfers page displays.

NYEIS Integrated Case - 58664

Transfers: NYEIS Integrated Case - 58664

New

Action	Transferring Municipality	Receiving Municipality	Transfer Date	Notification Status	Parental Objection?
View Edit	Albany	Monroe		No Transfer	Yes

The system automatically changes the **Parental Objection?** Field to 'Yes', and the **Notification Status** field to 'No Transfer'. The system also automatically closes the Accept Transfer task that was created in the Receiving Municipality's EIO/D Work Queue in essence "cancelling" the transfer. The system also initiates the Case Close Task in the current Municipality's EIO/D Work Queue to close the Child's Integrated Case.

The Parents Initially did not Consent to the Transfer but now Consents

In this scenario the current Transfer record would indicate that parents did object, and that the Notification Status is 'No Transfer'. The current Municipality has received a Close Case task in their EIO/D Work Queue.

NYEIS Integrated Case - 58664

Transfers: NYEIS Integrated Case - 58664

New

Action	Transferring Municipality	Receiving Municipality	Transfer Date	Notification Status	Parental Objection?
View Edit	Albany	Monroe		No Transfer	Yes

Click the Edit button in the Action column next to the current record. The **Modify NYS Municipality Transfer** page displays.

Apply necessary changes to the **Has parent/legal guardian objected to notification to the receiving municipality?** field and/or the **Parental Consent to Transfer Child's Records** field. Record the appropriate dates in the **Notification Date** field the **Transfer Date** field. Click the **Save** button. The **Transfers** page displays.

The system automatically changes the **Parental Objection?** Field to 'No', and the **Notification Status** field to 'Pending'. The system also automatically closes the Case Close Task in the current Municipality's EIO/D Work Queue to close the Child's Integrated Case. The system also initiates the Accept Transfer task that was created in the Receiving Municipality's EIO/D Work Queue.

Receiving a NYS Municipality Transfer for a Child

The receiving Municipality checks their EIOD work queue and processes the Transfer Request task. 📖 *Refer to* **Unit 1: Getting Started,** *Working with Tasks* and **Unit 4: Case Management,** *Tasks (Open Tasks Summary)* for further information about Tasks and Work Queues.

The date that the transfer is accepted is recorded in the **Transfer Date** field. Click the **Accept** button.

Upon acceptance by the Receiving Municipality, a New Integrated Case Created for <child's name> Task is created in the New Case work queue. The Municipality processes the task to assign the EIOD. 📖 *See* **Unit 2: Referral & Intake,** *Managing the Referral* for further information.

After a child has been transferred, accepted by the Receiving Municipality, and assigned an EIOD and Service Coordinator, a new IFSP needs to be created. 📖 *See* **Unit 6 – IFSP's and SA's,** *Managing an Individualized Family Service Plan for a Transferred or Re-Opened Integrated Case* for further information.

Important Information
- The receiving municipality should NOT clone the closed IFSP from the previous municipality. Cloning the closed IFSP will create the next IFSP in the IFSP cycle. The receiving municipality must create a "NEW" IFSP. The new IFSP will be a second IFSP of the same type and have a start date from the day after the meeting date entered and an end date equal to the end date of current 6 month IFSP cycle.
- In the event that the "new" IFSP created in the receiving municipality will be one month or less in duration until an IFSP review is required, if agreed to by the parent and IFSP team, two IFSPs may be created at the IFSP meeting. One

IFSP will be for the remaining short IFSP period and one IFSP will be for the next full 6 month IFSP period. The service coordinator, EIO/D and providers should be aware of the two IFSPs and associated SAs and make sure they bill under the proper Service Authorization number based on the time period of the service.

- Prior to closing an Integrated Case or an IFSP, the municipality should contact all providers and inform them of the effective date of the Integrated Case, or IFSP closure. Services cannot be delivered after this date. However, services delivered prior to this date will continue to be able to be invoiced for even after the IFSP closure date.

-

- **PLEASE NOTE:** it is especially important to address all Supplemental Evaluation SAs and ensure the data for the Supplemental Evaluation has been entered into NYEIS and that the Supplemental has been submitted by the evaluator and accepted by the EIO/D prior to closing the Integrated Case and/or the IFSP.

- In the event that the child's Integrated Case was closed prior to the transfer, and it is appropriate to use the child's existing MDE and eligibility determination to continue with EI services (if eligibility was established or the last date of service delivery was within approximately the last 90 days) the new municipality must submit a data change request to "unexpire" the MDE in order to be able to create a "new" IFSP of the correct type.

Note:

- The Receiving Municipality should proceed to create a new IFSP and associated Service Authorizations based upon the discussions with the parent. This may or may not include the same services the child was receiving previously. Information from the previous IFSP may be copied and pasted into fields in the new Initial IFSP as appropriate.

TRANSITIONS

Transitions occur when a Child is transitioning out of the Early Intervention Program to the Committee on Preschool Special Education (CPSE) or to other early childhood services.

Important Information
If a child's next IFSP review period will encompass the day before a child turns 3 years old, NYEIS will automatically populate the **End Date** of the IFSP period

with the date of the child's last eligibility for EIP services (the day before their third birthday).

In order for NYEIS to properly **End Date** the child's IFSP when the child is eligible for CPSE, the **Eligibility** cluster on the **Create CPSE Transition** page (which signals that the child has been determined eligible for CPSE services) MUST be completed 1) prior to the day before their third birthday, and 2) before the IFSP is created.

Transitions Page Review

❶ **Transitions** button – displays on the Navigation Bar of an **Integrated Case Home** page. Click button to access **Transitions** page.

❷ **New** button – displays on **Transitions** page. Allows User to create a new Transition.

❸ **Body** – displays a list of Transitions that can be viewed or updated.

Creating a Committee on Preschool Special Education Transition for a Child

Important Note: Even if a child is thought not to be eligible for CPSE, this must be documented in this section of the child's case. Enter "No" in the first field * Is Child Potentially Eligible for CPSE Services, click save and proceed to create an "Other Transition".

1. Click **My Cases** from the Menu Bar. **My Cases** page displays with a list of Child Cases.

2. Click Child **Case Reference** link number. **Integrated Case Home** page for the Child displays.

3. Click **Transitions** from the Navigation Bar. **Transitions** page displays.

4. Click **New** button. **Select Transition Type** page displays.

5. Select **Transition to CPSE** link. **Create CPSE Transition** page displays with the following sections: **Child Details**, **Potential Eligibility for CPSE Services**, **Eligibility for CPSE Services** and **Comments**.

6. Navigate from field-to-field using **Tab** key to enter information. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk. Date fields must be formatted as* ***mm/dd/yyyy*** *format.* 📖 *Refer to* **Appendix F** for additional information on completing fields.

Important Information
For additional guidance on the parent choosing to "opt out" of the notification of potential eligibility to the school district, refer to **Appendix L New York State EIP Opt-Out Procedures** for additional information**.**

If the family initially opts out of notification or declines the transition conference, the service coordinator should indicate in NYEIS that the family opted out and/or declined. If the family changes their mind and decides to pursue transition, then the service coordinator should notify the CPSE and /or convene the transition conference, but not change the original opt out or transition conference specific fields in NYEIS. The remaining fields on the transition page should be updated with appropriate information if the child continues with transition to CPSE. A note should also be made in the comment section of the transition page indicating the family originally opted out or declined the transition conference, but changed their mind later on.

---

7. Click **Save** button. **Transitions** page displays. The communications template, *Consent Form for Transition Notice* is available in NYEIS for Service Coordinators to notify School Districts of potential eligibility (📖 *Refer to* **Unit 4: Case Management, Creating *MS Word Communication***). *Errors or reasons display at the top*

Important Information:

There is a Transition Services section in the Child's IFSP Home Page which captures information regarding required transition steps and services for the Child and family. This information must be captured as a result of the IFSP meeting(s) in which transition (either to the Committee on Preschool Special Education (CPSE) or to other programs and services) is discussed with the family. When a new IFSP meeting is held, the date of the transition plan discussion should be entered into the fields in NYEIS. Each IFSP should reflect the date on which transition was discussed as part of that IFSP meeting. The dates on previous IFSPs should not be changed or updated. The current date should be entered into the new IFSP for that child.

Enter information on any issues under "IFSP Comments" including all circumstances that explain reasons for delay in timely completion of any transition activity. Comments will not be taken into consideration during the calculation of the indicator, but should be used for documentation purposes.

Transition should be discussed at all IFSP reviews/meetings and documented in the transition section of the IFSP in NYEIS. Additionally, all discussions regarding transition should also be documented in the service coordinator's log notes.

- Once the child's CPSE eligibility has been entered into the Transition record, the User may extend the IFSP. If the child's last EI eligible date is within 60 days of what would have been the end of the existing 6 month IFSP period, the User may continue to extend the existing IFSP by 30 day increments for up to 60 additional days until the child's last eligible date is reached. The IFSP May NOT be extended more than 60 days to reach the child's last eligible date. If the IFSP needs to be extended more than 60 days, an IFSP review must be completed.

- If a child is thought to be potentially eligible for CPSE, but is ultimately determined to be not eligible, this should be documented on both the "Create CPSE Transition" page with all information on the CPSE transition steps completed **AND** on the "Create Other Transition" page with the details of the transition plan.

Notes:
- **Transitions** page displays a list of all Transitions in a Child's Case history.

- Transitions can be edited by clicking the **Edit** button from the view page or the **Edit** link on the **Transitions** page. 📖 *Refer to* **Editing Transitions** section for further information.
- To close a Case after a Child has transitioned, 📖 *Refer to* **Unit 10: Municipal Administration,** *Closing an Integrated Case* for further information.
- The Date that a Child is first potentially eligible for CPSE services is displayed on the **Transitions** page. It will be populated based on Child's date of birth.

Creating Transition to Other Program

Important Note: Even if a child is thought not to be eligible for CPSE, this must be documented as a Transition to CPSE.
Enter "No" in the first field * Is Child Potentially Eligible for CPSE Services, click save and proceed to create an "Other Transition".

1. Click **My Cases** from the Menu Bar. **My Cases** page displays with a list of Child Cases.

2. Click Child **Case Reference** link number. *Be sure to select NYEIS Integrated Case for Case Type*. **Integrated Case Home** page for the Child displays.

3. Click **Transitions** from the Navigation Bar. **Transitions** page displays.

4. Click **New** button. **Select Transition Type** page displays.
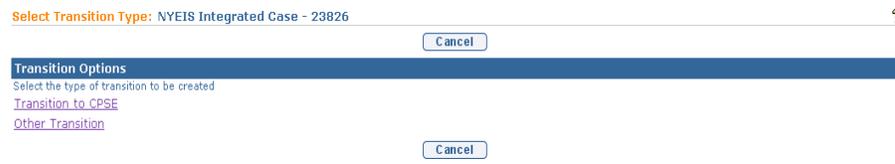
5. Select **Other Transition** link. **Create Other Transition** page displays with the following sections: **Child Details**, **Transition Details**, **Identify Early Childhood Programs and Support Services needed after Transition** and **Comments/Discussion related to locating and accessing above services**.

6. Navigate from field-to-field using **Tab** key to enter information. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.* **Last Date for EI Services** *in Transition Details section is expected Transition date.*

7. *.3If Child is was not determined eligible for CPSE services, this date must be day before Child's third birthday. Date fields must be formatted as* **mm/dd/yyyy** *format.*

   To select *all* options in the **Identify Early Childhood Programs and Support Services needed after Transition** cluster, click checkbox next to **Description** column heading. To select *individual* options, click the checkbox next to each item.

   Type text into field labeled **Name of Early Childhood Programs and Support Services Not Listed** for additional program or service types when **Other (Manually Enter Below)** option is selected.

8. Click **Save** button. **Transitions** page displays a list of Transition information. A task is generated to the EIOD if the Service Coordinator requests the Child's Case to be closed. 📖 *Refer to* **Unit 10: Municipal Administration**, *Closing a Case* for further information.

Important Information
If a child is thought to be potentially eligible for CPSE, but is ultimately determined to be not eligible this should be documented on both the "Create CPSE Transition" page with all information on the CPSE transition steps completed **AND** on the "Create Other Transition" page with the details of the transition plan.

Notes:

- **Transitions** page displays a list of all Transitions in a Child's Case history.

- Transitions can be edited by clicking the **Edit** button from the view page or the **Edit** link on the **Transitions** page. 📖 *Refer to* **Editing Transitions** section for further information.

Editing Transitions

1. Click **My Cases** from the Menu Bar. **My Cases** page displays with a list of Child Cases.

2. Click Child **Case Reference** link number. *Be sure to select NYEIS Integrated Case for Case Type*. **Integrated Case Home** page for Child displays.

3. Click **Transitions** from the Navigation Bar. **Transitions** page displays.

Action	Transition Date	Transition Type
View Edit	3/30/2009	Transition to Other Program

NYEIS Integrated Case - 14597

Transitions: NYEIS Integrated Case - 14597

New

4. Click **Edit** link under **Action** column for Transition to change. **Modify** page displays.

Modify Other Transition: NYEIS Integrated Case - 41984

Save   Close

Child Details

| Child's Name: | Park Montague | Date of Birth: | 6/1/2010 |

Transition Details

*Last Date for EI Services:	6/1/2011
Date Parent Informed of Last Date for EI Services:	
Transition Plan discussed with Parent?:	
If Yes, Please Enter Date Discussed:	
Early Childhood Programs and Support Services needed after Transition?:	

Identify Early Childhood Programs and Support Services needed after Transition

☐	Description
☑	Headstart
☑	Typically Developing Preschool Program
☐	Day Care Center
☐	Service under Private Insurance
☐	Office of Mental Retardation and Developmental Disabilities (OMRDD)

5. Apply necessary changes.

6. Click **Save** button. Changes are saved. **Transitions** page displays.