EHS Transition Plan – CP Instructions

General Information

When child is 30 months old, create the EHS Transition Plan event when you have the initial conversation about transition to preschool.

Schedule actions for specific required steps in the EHS transition process and procedures. Edit the scheduled actions when follow up is completed. Document all other follow up as Add Actions.

Set up To-Do List for the scheduled actions. See specific instructions below.

Note: Never create more than one event. If the child transfers to you, continue to use the event created by the previous home visitor or EHS teacher. For returning (rollover) children, continue to use the event you created last year.

Data Entry Instructions

- Event Date: date of initial conversation about transition to preschool.
- Status: always select In Process.
- Agency Worker: select your name if does not auto-fill.
- Document summary of initial conversation in the 30 Month section.
- Schedule the following Actions based on EHS Transition Plan timelines:
 - 1. Notify ERSEA
 - 2. Check on application and eligibility
 - 3. Classroom Visit
 - 4. Joint Staffing
 - 5. Joint Home Visit
- Closed Date: enter a closed date when the transition plan is completed during EHS enrollment. If the transition plan needs to be re-opened, delete the closed date. For example, at initial conversation parent is not interested in preschool. The event is closed. If parent decides later to apply for preschool, delete the closed date and continue the transition process.

EHS Transition Pla	Date of the initial co about transition to p		~ ∨ ⊚ ∈		
Event Date PIR	1/30/21	Always select In Process who	en event is created.		
Status	In Process	Select your name if does no	t auto-fill.		
Agency Worker	Sandeno, Karen				
Closed Date 30 Month - Initial Conv	rersation	Enter Closed Date when plan comple If plan needs to be re-opened, delete			
During this initial conversati eligibility guidelines and tra	ion, staff and family will discuss the family's desire or insition timelines. The EHS/family team will develop a p after the initial 30 month conversation.	plan. Add Actions to document all	Enter summary of initial conversation when event is created.		
*	ation. Include site preferences, if known. aren Sandeno During today's home visit, famil	U shared that they are potentially			
interested in classroom preschool, but at the moment are leaning toward the option of HS home visiting program until child turns 4 and transition to a classroom then.					

			41	-	-
33 I	Months	- V	/hat	0	Do

•Email ERSEA Team to inform them what the family needs and desires are regarding preschool and request eligiblity determination.

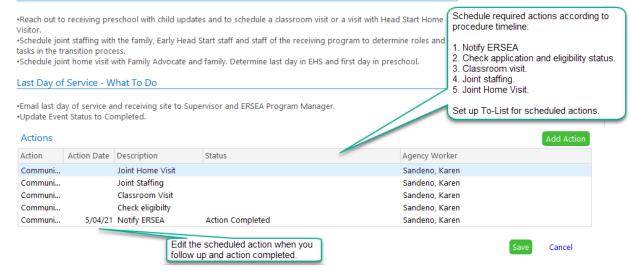
•Continue discussions with the family around the transition plan.

•Discuss and review preschool options with the family based on individual child needs and family location. •Contact potential site(s) or Head Start Home Visitor to schedule a visit.

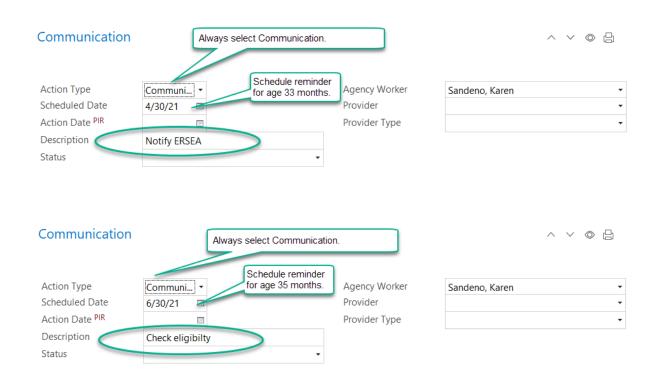
35 Months - What To Do

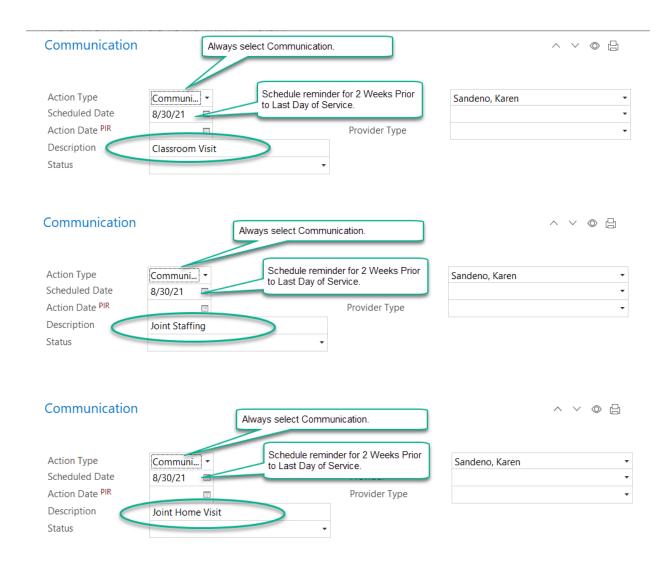
•Check on status of eligibility determination and waitlist site assignment(s). Follow up with ERSEA Coordinator Assistant with any questions or concerns.

2 Weeks Prior - What To Do



Samples of the Scheduled Actions





Sample of Updating Scheduled Action

In this sample, when you notify ERSEA, open the scheduled event and add Action Date, Status and Action Notes.

Action Type	Communi 🝷	Agency Worker	Sandeno, Karen	•
Scheduled Date	4/30/21	Provider		•
Action Date PIR	5/4/21 📼			-
Description	Notify ERSEA	When you follow up on a sche		
Status	Action Completed		open the scheduled action and enter Action Date, Status and Action Notes.	
Action Notes				ଓङ⊟മ∿∠'
		deno Email sent to Cynthia and Tamr noice is to stay in home visiting, but is	· · · · ·	· · · · ·

Set Up To-Do List

To-Do List tab. Click Add To-Do List.

Services To-Do List E	ntry Express	Managemei	nt Dashboard	Reports	Setup	Enter Report #	•	
To-Do Lists		Do List						
Attendance EHS Transition Scheduled Actions	Attendance EHS Transition Scheduled Actions							
Expiring Physicals due in 60 days (shar	Date 🔻	Item				Participant	Location
Recruitment Calendar								
Screenings (shared)	→ Da	ate: Older						
System-Generated Tasks	[8/30/2021	EHS Transition Plan C	Communication	Scheduled (Joint Staffing)	Child Sample	OESD EHS Home Based • Hc
Well Baby Exams Due	[8/30/2021	EHS Transition Plan C	Communication	Scheduled ((Joint Home Visit)	Child Sample	OESD EHS Home Based • Ho
	[8/30/2021	EHS Transition Plan C	Communication	Scheduled ((Classroom Visit)	Child Sample	OESD EHS Home Based • Ho
	[6/30/2021	EHS Transition Plan C	ommunication	Scheduled ((Check eligibilty)	Child Sample	OESD EHS Home Based • Ho
Add To-Do List								

General Tab Set Up

Set u

Do List Cottings	lighted.					
^{Ip}	EHS Trans	ition Scł	neduled Actio	ns		
General Health and Edu			shared To Do List	Set up Genera	I tab as highligh	ted.
EHS Transition Schedu			shared To-Do List			(L) #
This to-do list is to tra			-		2.	
🗹 Email this To-Do list	The 1st and 1	5th of 🔻	<mark>to k</mark> sandeno@oesd	114.org		
Also send a copy of						
If no items are found w				, separate each with a		
Note: Emails are sent to be sent only to you. If list, but each user will of participant names is inter- Calendars www.calendaryscore www.calendaryscore">www.calendaryscore">www.calendaryscore" wwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwww	the To-Do list is only receive conte cluded at Setup lar>	shared, emai ent applicable	ls will be sent to all u e to them. You can co	sers who have Full Acce ontrol how and whether	ss or View Access t	to the To-Do
Recruitment Calendar						

Health and Education Tab Set Up

- Section 1: Check the box that will show scheduled actions. You can edit the number of days to more than 15 if preferred.
- Section 2: In addition to your name, select the blank record in case the agency worker field is blank.
- Section 3: Check only EHS Transition Plan from the drop down list of events.
- Program Terms: Check current program term.
- Sites: Check your site, if box is not already checked.
- Classrooms: Check your caseload, if box is not already checked.
- Status: Check Enrolled, which is the default setting.
- Do not show before date: Set date to 8/1 of previous program term. This will capture pending scheduled actions for returning (rollover) families.
- Click Save.

Select at least one If you prefer, you can edit the number of days to more than 15. Image: Show required events that are due within the next 90 days Image: Show open events and actions that are scheduled within the next 15 days Image: Show open events and actions that are scheduled within the next 15 days Image: Show open events and actions that are scheduled within the next 15 days Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that have a status of Image: Show open events that dations that are required. Show open eventonly. Image: Show open event	To-Do List Settings: EHS Trar Help	nsition Plan	Select this setting to show scheduled actions.
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Sites Image: All Classrooms Program Terms: select only current program term. Image: OESD EHS Home Based Image: OESD EHS Home Based Program Terms: select your caseload if not already checked. Image: OESD EHS Home Based Image: OESD EHS Home Visitor 07 Program Terms: select your caseload if not already checked. Image: OESD EHS Home Based Image: OESD EHS Home Visitor 07 Program Terms: select your caseload if not already checked. Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Program Terms: select your caseload if not already checked. Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Program Terms: select pour caseload if not already checked. Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Program Terms: select pour caseload if not already checked. Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Program Terms: select pour caseload if not already checked. Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Always set this date to 8/1 of the previous program term. This will capture pending scheduled actions for returning (rollover) families. Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07 Image: OESD EHS Home Visitor 07	 Only show tasks for these event types Only show tasks for individuals who have a Program Terms 	EHS Transition	anne (hide list Check All Uncheck All Check Show Inactive Personnel
Status All Filter by Group New Health Advisory Committee Waitlisted Health Alert		OESD EHS Home Based	Program Terms: select only current program term. Sites: select your site if not already checked. Classrooms: select your caseload if not already checked. Status: select Enrolled (default)
	New Waitlisted	Health A	Group Advisory Committee