

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 Plan

The screenshot shows the 'EHS Transition Plan' form with the following fields and callouts:

- Event Date PIR:** 1/30/21. Callout: "Date of the initial conversation about transition to preschool."
- Status:** In Process. Callout: "Always select In Process when event is created."
- Agency Worker:** Sandeno, Karen. Callout: "Select your name if does not auto-fill."
- Closed Date:** (empty). Callout: "Enter Closed Date when plan completed during EHS enrollment. If plan needs to be re-opened, delete Closed Date."

30 Month - Initial Conversation

During this initial conversation, staff and family will discuss the family's desire or plan for preschool placement including eligibility guidelines and transition timelines. The EHS/family team will develop a plan. Add Actions to document all conversations and follow up after the initial 30 month conversation.

Summary of initial conversation. Include site preferences, if known.

9/20/2021 11:58 AM Karen Sandeno During today's home visit, family 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.

Enter summary of initial conversation when event is created.

33 Months - What To Do

- Email ERSEA Team to inform them what the family needs and desires are regarding preschool and request eligibility 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

- Reach out to receiving preschool with child updates and to schedule a classroom visit or a visit with Head Start Home Visitor.
- Schedule joint staffing with the family, Early Head Start staff and staff of the receiving program to determine roles and tasks in the transition process.
- Schedule joint home visit with Family Advocate and family. Determine last day in EHS and first day in preschool.

Last Day of Service - What To Do

- Email last day of service and receiving site to Supervisor and ERSEA Program Manager.
- Update Event Status to Completed.

Schedule required actions according to procedure timeline:

1. Notify ERSEA
2. Check application and eligibility status.
3. Classroom visit.
4. Joint staffing.
5. Joint Home Visit.

Set up To-List for scheduled actions.

Actions

Action	Action Date	Description	Status	Agency Worker
Communi...		Joint Home Visit		Sandeno, Karen
Communi...		Joint Staffing		Sandeno, Karen
Communi...		Classroom Visit		Sandeno, Karen
Communi...		Check eligibility		Sandeno, Karen
Communi...	5/04/21	Notify ERSEA	Action Completed	Sandeno, Karen

Add Action

Edit the scheduled action when you follow up and action completed.

Save

Cancel

Samples of the Scheduled Actions

Communication

Always select Communication.

Schedule reminder for age 33 months.

Agency Worker: Sandeno, Karen

Provider: [Dropdown]

Provider Type: [Dropdown]

Action Type: Communi...
 Scheduled Date: 4/30/21
 Action Date PIR: [Calendar Icon]
 Description: Notify ERSEA
 Status: [Dropdown]

Communication

Always select Communication.

Schedule reminder for age 35 months.

Agency Worker: Sandeno, Karen

Provider: [Dropdown]

Provider Type: [Dropdown]

Action Type: Communi...
 Scheduled Date: 6/30/21
 Action Date PIR: [Calendar Icon]
 Description: Check eligibilty
 Status: [Dropdown]

Communication

Always select Communication.

Schedule reminder for 2 Weeks Prior to Last Day of Service.

Action Type: Communi...
Scheduled Date: 8/30/21
Action Date ^{PIR}:
Description: Classroom Visit
Status:

Provider Type: Sandeno, Karen

Communication

Always select Communication.

Schedule reminder for 2 Weeks Prior to Last Day of Service.

Action Type: Communi...
Scheduled Date: 8/30/21
Action Date ^{PIR}:
Description: Joint Staffing
Status:

Provider Type: Sandeno, Karen

Communication

Always select Communication.

Schedule reminder for 2 Weeks Prior to Last Day of Service.

Action Type: Communi...
Scheduled Date: 8/30/21
Action Date ^{PIR}:
Description: Joint Home Visit
Status:

Provider Type: Sandeno, Karen

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...
Scheduled Date: 4/30/21
Action Date ^{PIR}: 5/4/21
Description: Notify ERSEA
Status: Action Completed

Agency Worker: Sandeno, Karen
Provider:

When you follow up on a scheduled action, open the scheduled action and enter Action Date, Status and Action Notes.

5/4/2021 7:29 AM Karen Sandeno Email sent to Cynthia and Tammy C to let them know mom is ready to do Head Start application. First choice is to stay in home visiting, but is also considering classroom.

Set Up To-Do List

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

The screenshot shows the 'To-Do Lists' sidebar on the left with 'Add To-Do List' circled in red. The main area displays a table titled 'EHS Transition Scheduled Actions' with columns for Date, Item, Participant, and Location. The table lists four items with dates ranging from 6/30/2021 to 8/30/2021, all involving 'Child Sample' participants at 'OESD EHS Home Based • Hc' locations.

Date	Item	Participant	Location
8/30/2021	EHS Transition Plan Communication Scheduled (Joint Staffing)	Child Sample	OESD EHS Home Based • Hc
8/30/2021	EHS Transition Plan Communication Scheduled (Joint Home Visit)	Child Sample	OESD EHS Home Based • Hc
8/30/2021	EHS Transition Plan Communication Scheduled (Classroom Visit)	Child Sample	OESD EHS Home Based • Hc
6/30/2021	EHS Transition Plan Communication Scheduled (Check eligibility)	Child Sample	OESD EHS Home Based • Hc

General Tab Set Up

Set up General tab as highlighted.

To-Do List Settings: EHS Transition Scheduled Actions

Help

General Health and Education

Set up General tab as highlighted.

Name
EHS Transition Scheduled Actions This is a shared To-Do List

Description
This to-do list is to track scheduled actions required as part of EHS Transition procedure.

Email this To-Do list The 1st and 15th of ... to ksandeno@oesd114.org

Also send a copy of each email to
To enter multiple email addresses, separate each with a comma.

If no items are found when the email is to be sent, send an email anyway to inform me no ite...

Note: Emails are sent to the Work Email address configured in Management/Personnel. If the To-Do list is not shared, emails will be sent only to you. If the To-Do list is shared, emails will be sent to all users who have Full Access or View Access to the To-Do list, but each user will only receive content applicable to them. You can control how and whether personal information such as participant names is included at [Setup | System Setup | System Preferences | Email](#)

Calendars
 <My Personal Calendar>
 Holidays
 Organization Calendar
 Recruitment Calendar

Modules (Tasks from selected modules will appear in this To-Do list)

Family Services
 Health and Education
 Immunizations
 Disability
 Mental Health
 Pregnancy

Click Save AFTER setting up Health and Education tab.

Show this To-Do list when I sign-in to ChildPlus

Save Undo Changes De

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.

To-Do List Settings: EHS Transition Plan

Help

General Health and Education

1. Select at least one

- Show required events that are due within the next 90 days
- Show open events and actions that are scheduled within the next 15 days
- Show events that will expire within the next 30 days
- Show open events that have a status of
- Show actions that have a status of (related event m...

2. Only show tasks when the agency worker for the event is Current User Help

3. Only show tasks for these event types EHS Transition Adiao, Marianne

Only show tasks for individuals who have an enrollment in

Program Terms

- Early Head Start 2020 - 2021

Sites All

- OESD EHS Home Based

Classrooms

- OESD EHS Home Based
- Home Visitor 07

Status All Filter by Group

- New
- Waitlisted
- Health Advisory Committee
- Health Alert

Do not show tasks for events and actions that are required, scheduled, have occurred, or will expire before 8/1/19

Show this To-Do list when I sign-in to ChildPlus

Save Undo Changes Delete this To-Do List

Select this setting to show scheduled actions. If you prefer, you can edit the number of days to more than 15.

In addition to your name, select the blank record in case agency worker field is blank.

Select EHS Transition Plan event only.

Other settings:
 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)

Always set this date to 8/1 of the previous program term. This will capture pending scheduled actions for returning (rollover) families.