EFS
Modernization Workshop Series

Office of Early Learning
Spring 2019
Housekeeping

This webinar is being recorded. Your phone is on mute. We will stop periodically to address questions. Individual cases may require follow up.

Please type your comments or questions in the Questions box in the webinar control panel. Presenters will attempt to answer questions during the event and/or follow up afterward.
SR Eligibility
Coalition Transfer
Overview

- Welcome
- Initiate Transfer - Family
- Process SR Household Transfer – Prior Coalition
- Process SR Household Transfer – New Coalition
- Questions
# Welcome

## Production Support Team Introductions

<table>
<thead>
<tr>
<th>ELC of Flagler and Volusia</th>
<th>ELC of Brevard</th>
</tr>
</thead>
<tbody>
<tr>
<td>ELC of Marion</td>
<td>ELC of Broward</td>
</tr>
<tr>
<td>ELC of North Florida/Episcopal</td>
<td>ELC of Florida's Gateway</td>
</tr>
<tr>
<td>ELC of Okaloosa Walton/Emerald Coast</td>
<td>ELC of IRMO</td>
</tr>
<tr>
<td>ELC of Palm Beach</td>
<td>ELC of Lake</td>
</tr>
<tr>
<td>ELC of Pinellas</td>
<td>ELC of Nature Coast</td>
</tr>
<tr>
<td>ELC of Polk</td>
<td>ELC of St. Lucie</td>
</tr>
<tr>
<td>ELC of Santa Rosa</td>
<td></td>
</tr>
<tr>
<td>Cindy Olszowy</td>
<td>Florinda Powell</td>
</tr>
</tbody>
</table>

| ELC of Duval              | ELC of Alachua |
| ELC of Manatee            | ELC of NWF    |
| ELC of Miami-Dade/Monroe  | ELC of Pasco and Hernando |
| ELC of Seminole           | ELC of SWF    |
| ELC of the Big Bend Region| RCMA          |
| Hannah Boswell            |               |

| ELC of Escambia           | ELC of Florida's Heartland |
| ELC of Florida's Heartland| ELC of Hillsborough       |
| ELC of Orange             | ELC of Osceola            |
| ELC of Sarasota           | Rhonda Jones             |
| Jim Ledbetter             |                           |
Checklist: Initiate Transfer - Family

- Ensure the family is eligible for a transfer.
  1) Is this family currently SR Funded or Local?
Checklist: Initiate Transfer - Family

• Ensure the family is eligible for a transfer.

2) Is the Household’s county currently set to a county within your service area? If not, then change it to one of your counties before setting the household to Pending Update.
Initiate Transfer - Family

- Change Household’s “Eligibility” Status to Pending Update
  1) Click the change household status button
Initiate Transfer - Family

- Change Household’s “Eligibility” Status to Pending Update
  2) Set New Status to Pending Update, Casenote, & Save
Initiate Transfer - Family

- Change Household’s “Eligibility” Status to Pending Update
  3) Verify Household’s “Eligibility” Status changed
Family – Update Address

• Family Must Update Address and Submit
  1) Family will need to log into their family portal account, Navigate to the School Readiness Funding Section, and click the Update Eligibility button.
Family – Update Address

- Family Must Update Address and Submit

2) Family will need to Navigate to the Household Address Page, and click “NO, I need to update the information” to initiate Edit Mode.
Family – Update Address

- Family Must Update Address and Submit

3) Once in Edit Mode, the county must be updated and Save to be flagged as a Household Transfer.
Family – Update Address

- Family Must Update Address and Submit

4) Once the address is saved the family user will be prompt with a Transfer Warning. They should click “Yes” to confirm.
Family – Update Address

• Family Must Update Address and Submit

5) Family User MUST Continue and Submit for Coalition Review.
Checklist: Process SR Household Transfer – Prior Coalition

• Ensure Household is ready for transfer.

  1) Verify that the Family User successfully submitted their EVs
Checklist: Process SR Household Transfer – Prior Coalition

• Ensure Household is ready for transfer.
  
  2) Verify all enrollments have ended.
  3) Click End Enrollments to end all enrollments.
Checklist: Process SR Household Transfer – Prior Coalition

• Ensure Household is ready for transfer.
  4) Click the End button to end the enrollment.
Checklist: Process SR Household Transfer – Prior Coalition

- Ensure Household is ready for transfer.

5) Set Reason, Last Day, and Parent Fee info then Save.
Checklist: Process SR Household Transfer – Prior Coalition

• Ensure Household is ready for transfer.

  6) You should be prompt to end the enrollment. Click Yes.
Checklist: Process SR Household Transfer – Prior Coalition

• Ensure Household is ready for transfer.
  
  7) Verify the Enrollment has been Ended. Click Close.
Checklist: Process SR Household Transfer – Prior Coalition

• Ensure Household is ready for transfer.
  
  8) Verify all children’s enrollment status has been Ended. If not then you will need to verify ALL enrollments have been ended.
Checklist: Process SR Household Transfer – Prior Coalition

• Transfer Household.
  1) Verify Transfer Household button is not unlock (no longer greyed out)
  2) Click Transfer Household button.

Contact Information

Primary Address: 112 Test Ln.
Tallahassee, Florida 33333
Santa Rosa County

Primary Parent
Email: oel.fp.qa+CTDemo01@gmail.com
Primary phone: (333) 332-2222

Family Portal Account
oel.fp.qa+CTDemo01@gmail.com

[Image of interface with highlighted Transfer Household button]
Checklist: Process SR Household Transfer – Prior Coalition

• Transfer Household.
  3) You should be prompted to confirm the Household Transfer to the New Coalition.
  4) Click Yes.
Checklist: Process SR Household Transfer – Prior Coalition

• Transfer Household.

  5) Verify that the Household Status is unchanged (the Household is not submitted to the New Coalition).
Checklist: Process SR Household Transfer – Prior Coalition

- Transfer Household.
  
  6) Access the Household Dashboard, click the Household ID
Checklist: Process SR Household Transfer – Prior Coalition

• Transfer Household.
  7) You can click the Childs Name to jump to the Childs info. (Option A or B)
Checklist: Process SR Household Transfer – Prior Coalition

- Transfer Household.
  7) You can click the Childs Name to jump to the Childs info.
    (Option A or B)
Checklist: Process SR Household Transfer – Prior Coalition

- Transfer Household.
  8) Under Eligibility Verification click Show All
Checklist: Process SR Household Transfer – Prior Coalition

- Transfer Household.

9) Verify that a New EV has been created for the New Coalition.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.
  1) Open Transferred EV by doing a search or accessing the Transfer Work queue.
  2) You need to Activate the EV in order to set up the Eligibility.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.

1) Click the Eligibility button to set up new Eligibility Assignment.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.
  1) Verify the Authorization Period (if missing notify Services Desk)
  2) Click Add Eligibility Assignment button.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.

3) Set Up Eligibility, be mindful of the Authorization End Date, you will not be able to end it outside the Date Range. Click Ok.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.

4) Verify and Click Save.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.
  4) Create Enrollment, click Enrollments button.
Checklist: Process SR Household Transfer – New Coalition

• Process Received Coalition Transfer.
  5) Add Enrollment, click Add Enrollments button.
Questions?