



EV Coalition Transfers

Monday, Oct. 8, 2018

1. If you have a coalition user account, please verify with your coalition admin that you have the **Coalition Transfer permission** set for your user account.
2. Verify that the address for the household is in your coalition services area. There may be instances where the enrollment/EV belongs to you but the household address was never updated in EFS Mod.
 - a. If the county is not correct then change the county to one of your counties.

Contact Information

Primary Address **Changed** History Edit

Volusia County

If the County is Incorrect then click the Edit button to Update. You only need to update the County. Just pick one of your counties.

Primary Parent

Email:

Primary phone:

Secondary phone:

Family Portal Account

3. Once you verify that the county is in your service area then change the SR household status to **pending update**.

Change Household Eligibility Status

Current Status: Active

New Status*

Inactive

Pending Update

Save Cancel

1 2 3

Change Household Status



- a. Be sure to instruct the family to update their address in the Family Portal. (especially the county)

Eligibility Verification Wizard

Household Address

Our records indicate the following primary address for your household.

Select if you are currently homeless or located at a Domestic Violence Shelter

Address Line 1 *

Address Line 2 (Apt, Suite, etc)

City *

County * Volusia

State *

Zip Code *

Proof of Residency *

Attach the documentation necessary to establish the household's proof of residency.

Proof of Residency *

Is this information accurate and complete?

Yes It is accurate and complete.

No I need to update the information.

Previous

- b. The family should see this message when they click the save button.

Coalition Transfer Warning

The county change will result in a transfer to a new coalition. Are you sure you want to change your address?

Yes No



- c. Once the family submits their EV you should be able to see the **Transfer Household** button in the Coalition Portal.

The screenshot shows the 'Eligibility Verification' portal. At the top, there are buttons for 'Assign Counselor' and 'Change Household Status'. A yellow box labeled 'Household is Flagged' points to a red notification 'Transfer Household For Services'. Below this is a 'Household at a Glance...' section with tabs for 'Children Needing Care', 'Parents', 'Other Household Members', and 'Total Household Income Calculations'. The 'Total Household Income Calculations' section shows: Employment income: [redacted], Alimony and child support income: \$0, Other income: \$0, Alimony and child support deductions: \$0, Total annual gross income: [redacted]. Below this is the 'Contact Information' section with tabs for 'Primary Address', 'Primary Parent', and 'Family Portal Account'. The 'Primary Address' tab shows 'Polk County' with a yellow box labeled 'County Changed' pointing to it. The 'Family Portal Account' tab shows a 'Transfer Household' button with a red 'X' over it. A yellow box labeled 'Mouseover to see requirement.' points to this button. A tooltip above the button reads: 'You must end all enrollments in the household to complete services transfer.'

- d. You will be able to click the **Transfer Household** button if all enrollments have been terminated.
(*Please note that if you do **not** see the **Transfer Household** button then you may not have the **Coalition Transfer permission** set on your user account.)