



**Department of
Education**

Chancellor Richard A. Carranza

Guide to the Document Transfer System (DTS)
***for DOHMH Central Administrators, Agency Administrators
and Service Coordinators***

[Guide to the Document Transfer System \(DTS\)](#)

Overview	3
Accessing and Logging into the Document Transfer System for the First Time	3
Bookmarking the Document Transfer System for Easy Access	3
Recovering Password	3
Service Coordinators	4-5
Updating Your Contact Information	
Transferring Documents to a CPSE	
Step 1: Attach Documents	
Step 2: Enter the Child and Family Information	
Step 3: Submit and Confirm Document Transfer	
Frequently Asked Questions (FAQs) from Service Coordinators	
Agency Administrators	6
Updating Agency Information	
Adding, Reinviting, and Deactivating, a Service Coordinator	
Transferring Documents on Behalf of a Service Coordinator	
DOHMH Central Users	7
Adding Agencies and Managing Users	

Overview

This step-by-step guide describes how to use the Document Transfer System. This secure, web-based system allows EI Service Coordinators to upload and transmit documents electronically to the New York City Department of Education (NYCDOE) Committees on Preschool Special Education (CPSEs), eliminating the need for paper faxes and a fax machine. The Document Transfer System makes the EI-to-CPSE transition more fluid, providing child and family information to the DOE in a way that facilitates DOE outreach to families. By securely transferring documents digitally, this system will also minimize the loss of information and increase accountability between agencies.

Service Coordinators will use this system to transfer scans of all documents to the NYCDOE. Before transferring the documents, Service Coordinators will input key information about the child and family.

Accessing the Document Transfer System

Note that in order for the DTS to function properly, be sure to use the below internet browsers and operating systems. **The application may work with other browsers like Internet Explorer or with other operating systems, though you will likely encounter technical issues.**

Required Internet Browsers	Required Operating Systems
<ul style="list-style-type: none"> ● Microsoft Edge ● Google Chrome ● Firefox 	<ul style="list-style-type: none"> ● Window 7 ● Windows 10 ● Mac

Logging in to the Document Transfer System for the First Time

1. To log into the Document Transfer System for the first time, open an email from your Agency Administrator titled **Invitation to the Document Transfer System**.
 - a. If you are a *service coordinator* and you have not received an email invitation, contact your agency administrator.
 - b. If you are an *agency administrator* and you have not received an email invitation, email npuffett@health.nyc.gov.
2. In the email invitation, click on the link that says “**Complete Registration Process.**” A window will open in your internet browser.
3. When prompted, complete your account registration (i.e., create a password, enter contact requested information, answer security questions).
 - a. Note that the DOE will have access to the contact information in your profile, so please ensure it is accurate and up to date.
4. Click **Save** to save your responses.
5. To log in in the future, your username is your email address.
6. After creating a profile, users will receive a confirmation email prompting them to login.

Bookmarking the Document Transfer System for Easy Access

For easy access to the Document Transfer page:

- Open the Document Transfer System in your browser.
- Click the star icon on the top right hand corner of the search bar.
- This will create a quick bookmark link on your browser.

Recovering your Password

To recover your password:

1. On the login page, select the **Forget or need to change your password?** link below **Vendors and Non-DOE Partners**.
2. Follow the instructions using your security questions to recover and/or change your password.

Service Coordinators

Service coordinators are responsible for scanning and uploading case documents to be transferred to the CPSE as well as inputting child and family information. Service coordinators must also ensure that their contact information remains up to date in the Document Transfer System.

Updating Your Contact Information

- From the dropdown menu in the top right of the screen, select **My Profile**.
- Update your contact information, including your name, phone number, password, and security questions.
- To save changes, click **Save Profile**.

Transferring Documents to a CPSE

Step 1: Select your Agency

- In the top left of the purple banner, use the drop-down menu to select the correct agency for this particular child. This is especially important if you work for multiple agencies. If you work for one agency, only one agency will appear.

Step 2: Attach Documents

- Using **Select Files**, attach each document you intend to submit for a particular student.
 - Each document must be uploaded individually, but you can submit up to twenty documents at once for one child.
 - Note:** When uploading documents there should be no special characters in the file names (with the exception of spaces, dashes and underscores).
- In the dropdown menu to the right of each document, select the form type (e.g., Notification of Potential Eligibility to the CPSE, Consent for a Transition Conference, etc.).
 - Note:** Referrals that are sent “early,” or 120 days or more before a child’s age eligibility will not be accepted in this system.
- If you are transmitting documents that require a parent/guardian consent, **either:**
 - Attach the consent form and select the consent form type from the dropdown menu.
 - Or, confirm that you have previously transmitted the appropriate consent form by clicking the box **Consent document previously uploaded**.
If you are not attaching and have not previously transferred the appropriate consent form, delete the document(s) that require consent.

Step 3: Enter the Child and Family Information

If you are transmitting a notification or a referral, **all information fields are required**. If you previously submitted the notification and referral for this child and are transmitting additional documents, only **the following fields are required:**

- | | |
|---|--|
| <input type="checkbox"/> Child first name and last name | <input type="checkbox"/> Child date of birth |
| <input type="checkbox"/> Child EI ID | <input type="checkbox"/> School district |

Step 4: Submit and Confirm Document Transfer

- Press **Upload** at the bottom of the screen.
- Verify that all documents successfully transferred by reviewing the confirmation window.
 - If one or more documents did not successfully transfer, complete Steps 1-2 for just those documents and resubmit.
- You will receive email confirmations of transmissions. Instead of uploading fax confirmations to NYEIS, you should save and upload email confirmations to NYEIS.

System Support:

- For questions about specific documents and cases, or about getting access to the DTS, contact your supervisor.
- For questions about this guide or issues regarding access to the Document Transfer System, contact preschoolSPEDsystemshelp@schools.nyc.gov.
- If you experience technical issues with the Document Transfer System, check with your agency to make sure there are no network or technical issues occurring at the agency level. If there are no agency specific network or technical issues, you can contact **NYC DOE Help Desk at 718-935-5100**.

Frequently Asked Questions (FAQ) from Service Coordinators

Am I expected to enter all of the child and family information fields for all forms?

- You are required to submit a response to ALL fields when submitting documents that include a Notification of Potential Eligibility and/or Form for Parent Referral to the Committee on Preschool Special Education.
- If you are submitting documents other than Notification and/or Referral, the following fields are required:
 - Child First Name and Last Name
 - Child Address Information
 - Child EI ID
 - Child Date of Birth
 - Home District
- As a reminder, transmissions can include multiple documents at once for one child, but documents must be uploaded as separate files (e.g., one Notification pdf and one Referral pdf can be uploaded at the same time).

When is parental consent required to share family and child information?

- It depends on what forms you are submitting. DTS states which form types require consent.
- Consent forms include: the Consent for EI Transmittal of EIP Evaluations and Records or the NYC EIP Consent to Obtain/Release Information.
- If you are submitting documents without including one of these signed forms, and if you have not previously submitted one of these forms on behalf of a family, you should mark the Parental Consent field as “NO” and you will not be able to complete fields that require parental consent.
- You must include a signed parental consent form, or check the box that states you have previously submitted one when sharing documents like EI evaluations, medical forms or other child/family information.

What should I do if my transmission contains an error or is sent accidentally?

- If you submit documents that contain errors, or accidentally submit a document with incomplete information, similar to the fax, you cannot retrieve or modify that particular transmission.
- You must re-submit the documents with the updated/correct information and with a cover letter briefly explaining why you are re-submitting these documents.
- After re-submitting documents with the cover letter, you must email the CPSE Chairperson and Community Coordinator notifying them that you have re-submitted this child’s documents.
- CPSE Chairperson and Community Coordinator emails can be found on the DOE website at <https://www.schools.nyc.gov/learning/special-education/help/committees-on-special-education>.
- In this email, you must include the child’s DOB and NYEIS ID.

What should I do if I need to communicate new information to the DOE after submitting documents via the DTS?

- Please follow regular EIP policies and procedures regarding communication with CPSE.
- If this means re-submitting documentation when changes occur, follow all usual procedures as you would have with the fax machine, but now using the DTS.
- If you have questions about EIP or agency procedures, contact your supervisor.

How should parents submit referrals to the DOE?

- Parents should use the contact information found on the [DOE website](#) to submit referrals, as always. The DTS is only for EI agency administrators and service coordinators.

May service coordinators submit multiple documents at once using the DTS?

- Service coordinators may submit multiple documents using the DTS so long as **each document is uploaded as a separate file** and **all documents are for the same child**.

Agency Administrators

Agency administrators manage an agency's contact information and the service coordinators who work with the agency. Managing service coordinators includes adding, reinviting, and deactivating service coordinators. In the rare case when necessary, an agency administrator may also transfer documents to a CPSE on behalf of a service coordinator.

Updating Agency Information

To update agency information (e.g., phone number, fax number, address, etc.):

- Select the **Agencies** tab in the top right.
- Click the three bars to the right of the agency
- Select **Update Agency**.
- Update the agency information fields
- Select **Update Agency** to save changes.

Adding, Reinviting, and Deactivating a Service Coordinator

To manage service coordinators, select the **Users** tab in top left of the screen.

To add a Service Coordinator:

- Select **Invite Service Coordinator** in the top right of the screen.
- Input the email addresses of Service Coordinators you would like to invite.
 - You can invite up to FIVE Service Coordinators at once.
 - Note that you **MUST** press enter or tab between service coordinator emails when inviting them, or an error will appear.
- Select the agency.
- Select **Invite Users**.

To Resend an Email Invitation to a Service Coordinator

- From the list of all Service Coordinators, find the Service Coordinator you would like to reinvite.
- In the far right column, click the three black bars. Then, select **Resend Invitation**.

To Deactivate a Service Coordinator:

- From the list of all Service Coordinators, find the Service Coordinator you would like to deactivate.
- In the far right column, click the three black bars. Select **Edit User**.
- Under **Agencies**, select the **X** next to the agency (or agencies) you wish to deactivate for this Service Coordinator.
- Select **Update User**.

Transferring Documents on Behalf of a Service Coordinator

In the rare circumstance when an Agency Administrator needs to submit a document to a CPSE on behalf of a Service Coordinator:

- From the drop-down menu to the right of the purple bar , select **Upload Documents**.
- Follow the steps on page 4 for how to transmit documents to a CPSE.

System Support:

- For questions about adding an agency administrator, contact DOHMH Central Administrator, Nora Puffet at npuffett@health.nyc.gov.
- For questions about specific documents and cases, or about getting access to the DTS, contact your supervisor.
- For questions about this guide or issues regarding access to the Document Transfer System, contact preschoolSPEDsystemshelp@schools.nyc.gov.
- If you experience technical issues with the Document Transfer System, check with your agency to make sure there are no network or technical issues occurring at the agency level. If there are no agency specific network or technical issues, you can contact **NYC DOE Help Desk at 718-935-5100**.

DOHMH Central Users

Central users are responsible for adding and deactivating agencies. When adding an agency, Central users must include at least one agency administrator who will have the ability to add service coordinators. Central users may also deactivate agency administrators as well as add and deactivate service coordinators.

Adding Agencies and Managing Users

To add an Agency:

- From the purple menu bar, select **Agencies**.
- Select **Create New Agency**.
- Input the Agency information, including: NYS DOH ID, agency name, address, phone number, and fax.
- Click **Create Agency**.

To deactivate an agency:

- First, remove any users from the agency using the steps outlined below
- On the **Agencies** tab, click on the three bars to the right of the agency you wish to delete. Select **Delete Agency**. (This option will only appear if all users assigned to that agency have been removed from the agency.)

To Manage Agency Users:

- Select the **Users** tab in the top left of the purple menu bar.
- Use the search function to find the user you would like to manage.

To invite a new agency administrator:

- Select **Invite User** in the top right.
 - You can invite up to FIVE agency administrators at once.
 - Note that you **MUST** press enter or tab between agency administrator emails when inviting them, or an error will appear.
- Input email addresses for new administrator(s), and select the agency from the drop-down menu.
- Select **Invite Users**.

To reinvite an agency administrator:

- From the list of all an agency's users, find the administrator you would like to reinvite.
- In the far right column, click the three bars and select **Resend Invitation**.

To deactivate an agency administrator or other user:

- From the list of an agency's users, find the user you would like to deactivate.
- In the far right column, select **Edit User**.
- Under **Agencies**, select the **X** next to the agency (or agencies) you wish to deactivate for this Service Coordinator.
- Select **Update User**.

System Support:

- For questions about this guide or issues regarding access to the Document Transfer System, contact preschoolSPEDsystemshelp@schools.nyc.gov.
- If you experience technical issues with the Document Transfer System, check with your agency to make sure there are no network or technical issues occurring at the agency level. If there are no agency specific network or technical issues, you can contact **NYC DOE Help Desk at 718-935-5100**.