Missouri First steps™

EARLY INTERVENTION

Provider

User Manual

Software Version 2.207

THIS PAGE INTENTIONALLY LEFT BLANK

MISSOURI FIRST STEPS

Provider User Manual

Software Version 2.207

THIS PAGE INTENTIONALLY LEFT BLANK

Table of Contents

Welcome

User Manual Overview

Welcome to the Missouri First Steps user manual. The purpose of this user manual is to provide you with a powerful reference to help you use the Missouri First Steps application. This user manual is compiled from the help topics included in the Missouri First Steps help system. This user manual is comprised of step-by-step exercises that walk you through each individual page within the application. And, because this user manual is compiled from help topics included in the Missouri First Steps application, you can also access the appropriate topics online whenever you are using the application.

This user manual is an excellent source for looking up specific tasks and is organized based on the structure of the Missouri First Steps application for easy accessibility. The user manual is divided into a few distinct areas. Take a minute to look at the Table of Contents (TOC) and flip through the user manual to familiarize yourself with the information it holds so the next time you need a piece of information quickly, you'll know where to find it. For example, if you need to know how to view a child's details within the Missouri First Steps application, you can look in the Table of Contents within the **Child** section for the topic named **Child Detail**. If you are viewing the user manual in a paper-based or printed format, once you know the topic's page number, you can open the user manual to the appropriate page. Or, if you are viewing the user manual in an online format, you can click the hypertext link to go directly to the appropriate topic.

User Manual Content

This user manual includes the following components organized in the order as follows:

- **Welcome** - Outlines the content of this user manual and explains how this user manual can be used. It includes information about the general structure of this manual and tips to help you get the most out of it.
- **Table of Contents** - Contains every functional page in the application. The TOC is organized in roughly the same way as the application, with content grouped together by application area. Use the TOC to look up topics that cover application pages and common scenarios, and browse by application area.
- **Main Body** - Covers all of the pages available within the application and includes instructions on how to perform tasks on those pages. The Main Body of this user manual functions as a software manual and user reference. If you need to know the purpose of a specific page or page element, what page to use for a specific task, or how a specific page element is used, reference the main body of this user manual.
- **Glossary** - Contains particularly difficult or specialized words used in this help file along with their definitions. If you are unsure about the meaning of a word used within this help file, you can look up its definition in the Glossary.

Conventions and Features

This user manual follows certain conventions that make it easy for you to use the materials presented and includes the following features to help you easily identify similar information from one topic to another:

- Each chapter groups topics together by application area, so you'll know what you can expect to see.
- Each page topic begins by explaining what it covers, so you'll know from the start what you'll be learning.
- Each page element (an object or control displayed on an application page) is referenced with bold lettering to help it stand out on the page, so that you can identify it more easily.

Pictures of application pages are included throughout this user manual. The pictures are included for your reference and will help familiarize you with the pages in the application. Data displayed in the pictures is irrelevant and can be ignored.

Navigational icons are displayed in the left-hand margin of the user manual to help you find specific types of information quickly. The icons are displayed and defined below.

Page Access Icons

The application-page-and-green-arrow icon displays to the left of paragraphs that provide information about how to access a specific application page. These paragraphs inform you where you can access the application page and what steps must be taken to display it. This type of information is included immediately after the introduction in topics that cover a specific application page.

Note Icons

The notepad-and-pencil icon displays to the left of paragraphs that provide additional, and usually more detailed, information about the application. Sometimes the notes give you additional information about the page you're working with, and sometimes the notes inform you where to find additional information elsewhere within this help file. Either way, it is well worth your time to watch for these helpful icons.

Paying attention to the icons as you read through this user manual will help you locate important details that you might otherwise overlook. The icons serve as visual cues and will quickly guide you to the information you need.

Using This Manual

This user manual can be used as a training manual or as a reference manual for the software. If you need help with a specific application page, page element, or task, you will find those topics in the main body of this user manual. You can use the Table of Contents to find a specific topic by browsing for it. The TOC organizes topics in roughly the same way that you might encounter them while navigating through the application.

This structure allows you to get a better feel for the application since it shows you related topics found in the same area of the application. However, for this method to be effective, you need to have some idea of where the application page you're looking for is located within the application. Once you've located the topic for an application page, you'll need to know how to get to that page from your current location within the application. This is when the Page Access information, located after each topic's introduction, is most helpful.

If you are viewing this user manual online as a PDF, hypertext links are enabled and allow you to jump within the document directly to each page or tutorial referenced within the content of the user manual.

Help System Overview

The Missouri First Steps help system contains information about application pages found within the Missouri First Steps web application. Each help topic describes a specific web page and includes the following information:

- The purpose of the page,
- How to navigate to the page,
- The controls found on the page, and
- The tasks that can be started from the page.

Preparing to Display Help

The Missouri First Steps help system is designed to support a screen resolution of 1024x768 pixels, and a High Color (16 bit) color depth. We recommend you display the help system with a screen resolution of 1024x768 or better, and a High Color (16 bit) color depth or better. Screen areas less than 1024x768 pixels and color schemes less than High Color (16 bit) are not supported by the help system; therefore, displaying the help system at a screen resolution of 800x600 pixels or less, or at a color depth of 256 colors or less, is not recommended. For more information on how to change your computer's screen resolution and color depth, refer to your operating system's help files.

Displaying Help

Help topics display in this content pane of the help system. Within the application, the help system is displayed by clicking the **Online Help** menu option on the **Help** menu available on the Missouri First Steps application's top menu bar. Specific help topics can be accessed through help system's table of contents, index, or search functions. For your convenience, the help system also includes a glossary of terms that contains definitions of the terms most commonly used within the application and this help system.

Navigating Help

Within the help system, navigation buttons are displayed in the pane along the top of your browser window. The contents, index, glossary, and search functions are displayed in a pane on the left side of your browser window when clicked. The following list describes each of the navigation buttons:

- Click the **Contents** button to access the help system's table of contents.
- Click the **Index** button to access the help system's index.
- Click the **Search** button to access the help system's search function.
- Click the **Glossary** button to access the help system's glossary of terms.

To navigate to a previously displayed help topic, click your browser's **Back** button. For more information on navigating web pages, refer to your browser's help file. To print the currently displayed help topic, click your browser's **Print** button. For more information on printing web pages, refer to your browser's help file.

Complete the following steps to navigate through the help system's interface:

1. Click the **Contents** button to display the help system's table of contents pane on the left side of your browser window.
2. Click the **Index** button to display the help system's index pane on the left side of your browser window.

   OR

   Type a keyword or phrase in the text box to highlight a specific help topic. You can enter partial information to widen the results displayed.

   Click a keyword (or press Enter) in the index to display the help topic.
3. Click the **Search** button to display the help system's search pane on the left side of your browser window.

4. Click the **Glossary** button to display the help system's glossary on the left side of your browser window.

NOTE: When you find the help topic you seek using one of the methods listed above, you can click the **X** button to hide the help system's left navigation pane.

Missouri First Steps Home page

Home

This page allows you to quickly access and perform tasks within the Missouri First Steps application. Depending on the method of access, your current permissions, and whether you are logged in or logged out currently, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

The Home page is the first page that displays when the Missouri First Steps application is initially accessed via your web browser. Once the application is accessed, you can navigate to the Home page at any time by selecting the **Home** menu.

The Home page displays differently when you are logged into the Missouri First Steps application.

Home page (default view)

Accessing Information on the Home page

The Home page is the first page displayed when you launch the application. The Home page provides shortcuts to commonly used tasks within the application.

Before you log into the application, you can complete the various tasks using the right menu bar on the Home page.

Refer A Child:

- Select the **Refer A Child** menu option to create a new Online Referral or NICU Referral for a child. The Referral Source page displays.

Families:

- Select the **Parent Information** menu option. The Missouri Department of Elementary and Secondary Education website's the Parents page displays.

- Select the **SPOE Offices** menu option. The Missouri Department of Elementary and Secondary Education website's First Steps Contacts page displays.
- Select the **Find A Provider** menu option. The Missouri First Steps website displays.
- Select the **Report An Issue** menu option. The Report Issue page displays.
- Select the **Contact Information** menu option. The Contact Information page displays.

Providers:

- Select the **Enroll With First Steps** menu option. The Missouri Department of Elementary and Secondary Education website's Provider Enrollment/Disenrollment Information page displays.
- Select the **Access Service Matrix** menu option. The Missouri First Steps website displays.

Browsers To Use:

- Select the **Browsers To Use** menu option to view details about browser compatibility for this application. The Browser Compatibility page displays.

NOTE: To access the functions listed above after you have logged into the application, click the **Logout** link at the top right of the page. You are logged out of the application and can access the functions above.

Logging In

To log in to the Missouri First Steps application, enter your **User Name** and **Password** in the fields at the top right of the page and press **Enter** or click the **Login** button. The Home page can be accessed at any time while working in the application. To access the Home page while logged in, select the **Home Page** menu option on the menu bar.

NOTE: If you have forgotten your password, click the **Forgot Password** link at the top right of the page.

Home page (logged in default view)

The Main Menu Bar

Once you are logged into the Missouri First Steps application, you can navigate to various pages to complete specific tasks using the main menu bar at the top of the page. The main menu bar is available on all main pages throughout the application.

Home:

- Select the **Home** menu option to access the Home page.
- Select the **SPOE Locations** menu option to display the Missouri Department of Elementary and Secondary Education website's First Steps Contacts page.
- Select the **Provider Enrollment** menu option to display the Missouri Department of Elementary and Secondary Education website's Provider Enrollment/Disenrollment Information page.

Child Care Management:

- Select the **Child Search** menu option to display the Child Search page.

EI Team:

- Select the **EI Teams** menu option to display the EI Teams page.
- Select the **Meeting Calendar** menu option to display the EI Team Meeting Calendar page.

Provider Account Management:

- Select the **Billing Detail** menu option to display the Billing Entity Detail page.
- Select the **Account Detail** menu option to display the Provider Account Detail page.
- Select the **Provider Communication Messages** menu option to display the Provider Communication Messages page.
- Select the **Authorization Search** menu option to display the Authorization Search page.
- Select the **Claim Search** menu option to display the Claim Search page.
- Select the **Claim Entry** menu option to display the Enter A Claim page.

User Options:

- Select the **Change Password** menu option to display the Change Password page.

Help:

- Select the **Online Help** menu option to display the Help System Overview for the application in a new browser tab or window.

The Selection Bar

A selection bar is available at the top of the Home page. The selection bar provides a quick navigation method to additional pages available. Click the following links on the selection bar to view additional information as necessary:

- Click the **Child List** link to display the Child List quick links section of the Home page. This link is typically used when you have navigated using of the other links available on the selection bar (listed below).
- Click the **Message Center** link to display the Message Center page.
- Click the **Progress Notes Due** link to display the Provider Progress Notes Due page.

Throughout the application, selection bars are available on various pages and function very similarly to the Home page's selection bar. Some selection bars contain additional details and buttons to perform various tasks.

Child List Quick Links

The Home page provides shortcuts to commonly viewed child lists within the application.

Child:

- Click the **My EI Kids** link to display the My EI Kids page.

Meetings:

- Click the **Meetings Scheduled** link to display the Meetings Scheduled page.

Notes:

- Click the **Progress Notes Due** link to display the Provider Progress Notes Due page.

Referral Source

This page allows you to add external referrals for a child.

To access this page, complete the following steps:

- If you are currently logged into the Missouri First Steps system, select the **Logout** link at the top right of the page. You are logged out of the system and the Home page displays.
- Select the **Refer A Child** menu option on the right menu bar.

Referral Source page (default view)

NOTE: This page can only be accessed when you are logged out of the Missouri First Steps system.

Referring a Child

This page provides shortcuts to the various methods by which a child can be referred to the Missouri First Steps program.

See the following topic(s) for more information:

- Online Referral
- NICU Referral

Online Referral

This page allows you to perform the online referral process and refer a child to the Missouri First Steps program on the Online Referral page.

NOTE: This page can only be accessed when you are logged out of the Missouri First Steps system.

Complete the following steps to work with this page:

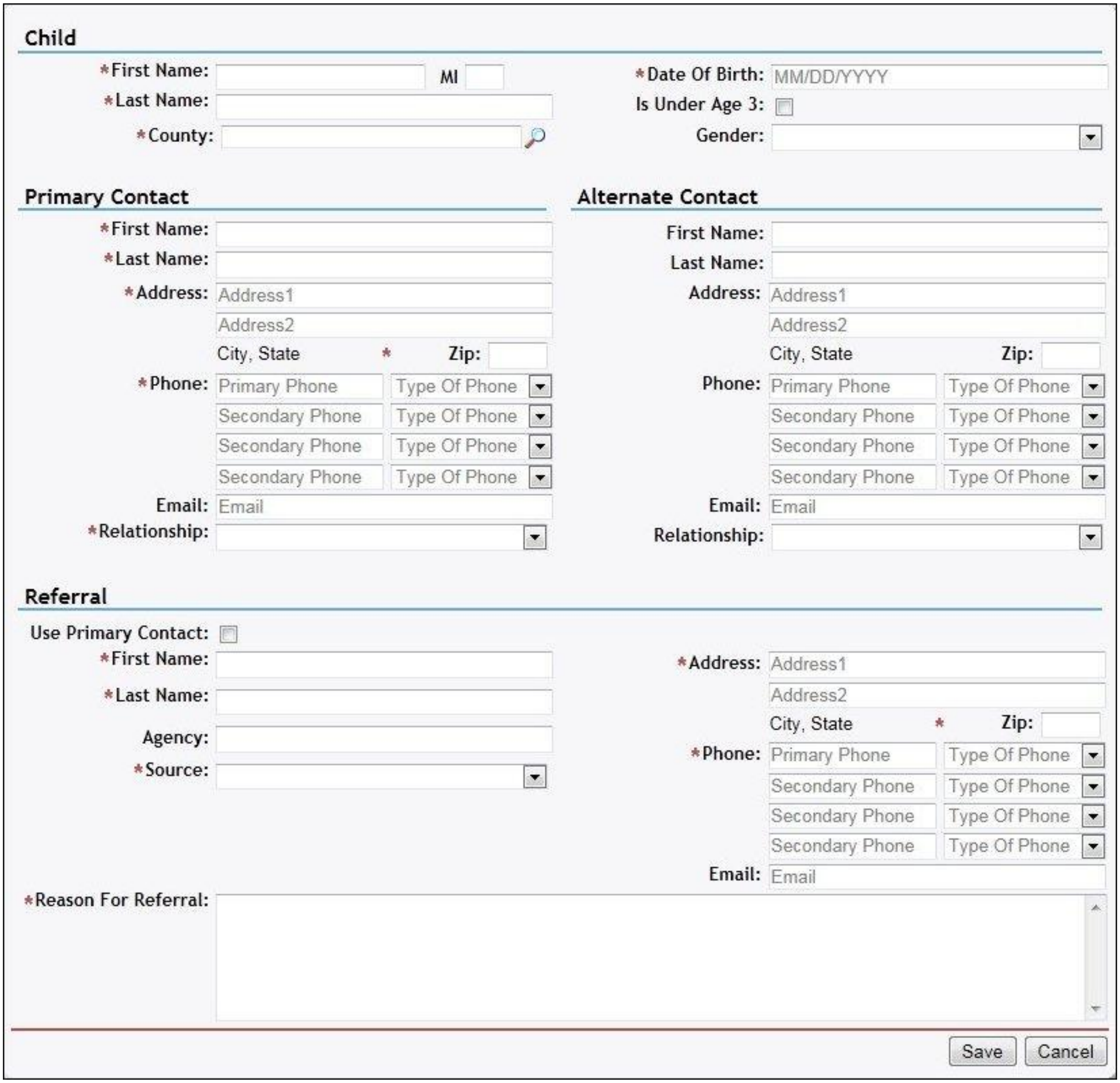
1. If you are currently logged into the Missouri First Steps system, select the **Logout** link at the top right of the page. You are logged out of the system and the Home page displays.

Home page (default view)

2. Click the **Refer A Child** menu option on the right menu bar. The Referral Source page displays.

Referral Source page (default view)

3. Select one of the **Referral Source** links. The Online Referral page displays.



Online Referral page (default view)

> **NOTE:** If you selected a NICU **Referral Source**, you are prompted to enter an access code. For more information about NICU referrals, see the NICU Referral page.

4. Add the child's details.

The **Child** section contains the child's demographic data, which can be entered as follows:

- In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
- In **MI**, enter the middle initial of the person. Only one alphabetic character can be entered.
- In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.

- Click the **Select County** link to search for and select the county in which the person resides or practices. For more information about searching for and viewing the list of counties, see the County Search topic.
- In **Date of Birth**, enter the month, day, and year on which the person was born. For more information about entering dates, see the Calendar Controls topic.
- Select the **Child Is Under Age 3** check box to indicate that the child is currently under three years of age. It is unchecked as the default.
- In **Gender**, select the person's sex from the drop-down list.

5. Add the contact information for the child's primary contact person.

The **Primary Contact** section displays the name and details for the child's primary contact person, which can be entered as follows:

- In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
- In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
- In **Address**, enter the street address at which the residence (or office) is located. You can enter up to 100 characters as necessary in each of the two address controls as necessary.
- In **ZIP**, enter the complete five-digit ZIP code in which the residence (or office) is located. Once entered, the name of the city and the two-character state abbreviation associated with the ZIP code are displayed.
- In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.
- In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
- In **Relationship**, select the specific relationship in the household to assign to the person from the drop-down list.

6. Add the contact information for the child's secondary or alternate contact person, as necessary.

The **Alternate Contact** section displays the name and details for the child's secondary contact person, which can be entered as follows:

- In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
- In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
- In **Address**, enter the street address at which the residence (or office) is located. You can enter up to 100 characters as necessary in each of the two address controls as necessary.
- In **ZIP**, enter the complete five-digit ZIP code in which the residence (or office) is located. Once entered, the name of the city and the two-character state abbreviation associated with the ZIP code are displayed.
- In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.
- In **Relationship**, select the specific relationship in the household to assign to the person from the drop-down list.

7. Add the details on the child's referral and referring person.

The **Referral** section displays the source and reason of the child's referral, which can be entered as follows:

- Select the **Use Primary Contact** check box to indicate that the primary contact person is also the person who referred the child to the program. When this check box is checked, the page refreshes and the primary contact person's demographic information is copied from the **Primary Contact** section to the corresponding referral person's demographic fields. When this check box is unchecked, the page refreshes and the referral person's demographic fields are cleared.

- In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
- In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
- In **Agency**, enter the name of the associated agency. You can enter up to 65 characters as necessary.
- In **Source**, select the primary referral source from the drop-down list.
- In **Address**, enter the street address at which the residence (or office) is located. You can enter up to 100 characters as necessary in each of the two address controls as necessary.
- In **ZIP**, enter the complete five-digit ZIP code in which the residence (or office) is located. Once entered, the name of the city and the two-character state abbreviation associated with the ZIP code are displayed.
- In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.
- In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
- In **Reason For Referral**, enter the reason why the person was referred to the Missouri First Steps program. At least one character must be entered, and you can enter up to 500 characters as necessary.
- In **How did you find out about First Steps?**, select the way in which the referring person heard about the Missouri First Steps program from the drop-down list. This field displays if the referral **Source** is "Parent".
- Select the **Yes** or **No** radio button under **The family has been informed of this referral** to indicate that the family has been contacted regarding the child's referral to the Missouri First Steps program. This check box displays if the referral **Source** is not "Parent".
- In **If not, how did you plan on informing them?**, enter the planned method of contact regarding the person's referral to the Missouri First Steps program. You can enter up to 500 characters as necessary. This field displays if the referral **Source** is not "Parent".

NOTE: Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page when attempting to save the data.

8. Click the following command button(s) as necessary.
    - Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

NICU Referral (Access Code)

This page allows you to enter the access code required to add an external NICU referral for a child.

To access this page, complete the following steps:

- On the Referral Source page, select the **Neonatal Intensive Care Unit (NICU)** link.

NICU Referral (Access Code) page (default view)

NOTE: This page can only be accessed when you are logged out of the Missouri First Steps system.

Accessing the NICU Referral Process

You'll need to enter a valid access code on this page to access and complete the NICU referral process.

See the following topic(s) for more information:

- NICU Referral

NICU Referral

This page allows you to perform the online NICU referral process and refer a child to the Missouri First Steps program.

NOTE: This page can only be accessed when you are logged out of the Missouri First Steps system.

Complete the following steps to work with this page:

1. If you are currently logged into the Missouri First Steps system, select the **Logout** link at the top right of the page. You are logged out of the system and the Home page displays.

Home page (default view)

2. Click the **Refer A Child** menu option on the right menu bar. The Referral Source page displays.

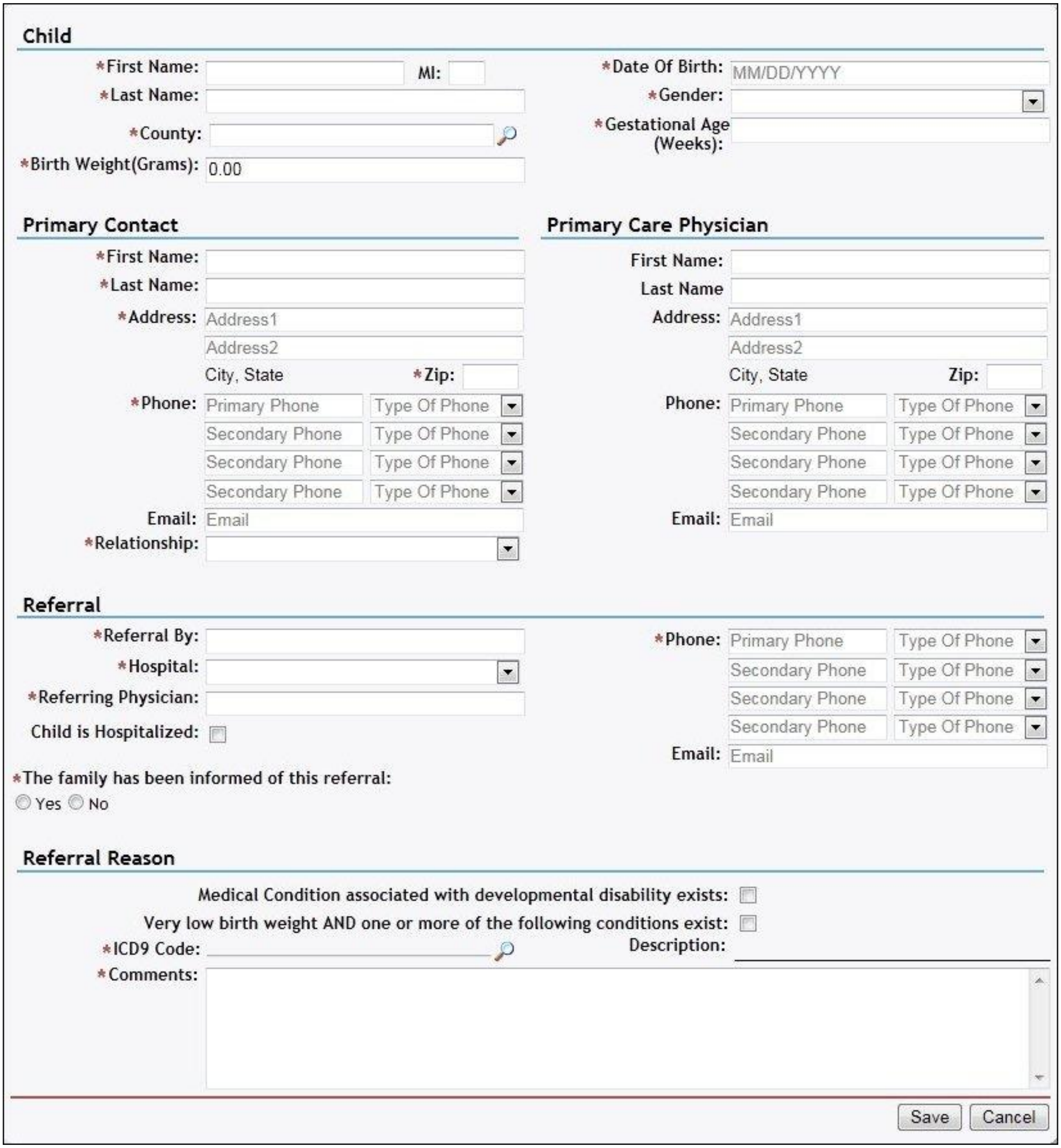
Referral Source page (default view)

3. Select the **Neonatal Intensive Care Unit (NICU)** link. The NICU Referral (Access Code) page displays.

NICU Referral (Access Code) page (default view)

> **NOTE:** If you selected a non-NICU **Referral Source**, you are not prompted to enter an access code. For more information about non-NICU referrals, see the Online Referral tutorial.

4. Enter the **Access Code** and click **Next**. The NICU Referral page displays.



NICU Referral page (default view)

NOTE: Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page when attempting to save the data.

5. Add the child's details.

The **Child** section contains the child's demographic data, which can be entered as follows:

- In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
- In **MI**, enter the middle initial of the person. Only one alphabetic character can be entered.
- In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
- Click the **Select County** link to search for and select the county in which the person resides or practices. For more information about searching for and viewing the list of counties, see the County Search topic.
- In **Date of Birth**, enter the month, day, and year on which the person was born. For more information about entering dates, see the Calendar Controls topic.
- In **Gender**, select the person's sex from the drop-down list.
- In **Gestational Age (Weeks)**, enter the person's gestational age in weeks. Only whole, numeric digits can be entered.
- In **Birth Weight (Grams)**, enter the person's birth weight in grams. Only numeric digits with up to two decimal places can be entered.

6. Add the contact information for the child's primary contact person.

   The **Primary Contact** section displays the name and details for the child's primary contact person, which can be entered as follows:

   - In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
   - In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
   - In **Address**, enter the street address at which the residence (or office) is located. You can enter up to 100 characters as necessary in each of the two address controls as necessary.
   - In **ZIP**, enter the complete five-digit ZIP code in which the residence (or office) is located. Once entered, the name of the city and the two-character state abbreviation associated with the ZIP code are displayed.
   - In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.
   - In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
   - In **Relationship**, select the specific relationship in the household to assign to the person from the drop-down list.

7. Add the contact information for the child's primary care physician, as necessary.

   The **Primary Care Physician** section displays the name and details for the child's primary care physician, which can be entered as follows:

   - In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
   - In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
   - In **Address**, enter the street address at which the residence (or office) is located. You can enter up to 100 characters as necessary in each of the two address controls as necessary.
   - In **ZIP**, enter the complete five-digit ZIP code in which the residence (or office) is located. Once entered, the name of the city and the two-character state abbreviation associated with the ZIP code are displayed.
   - In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.

- In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.

8. Add the details on the child's referral and referring person.

   The **Referral** section displays the source and reason of the child's referral, which can be entered as follows:

   - In **Referral By**, enter the first and last name of the individual that referred the child.
   - In **Hospital**, enter the name of the hospital with which the physician is affiliated.
   - In **Referring Physician**, enter the first and last name of the physician that referred the child.
   - Select the **Child Is Hospitalized** check box to indicate that the child is currently in the hospital. It is unchecked as the default.
   - Select **The family has been informed of this referral** check box to indicate that the family has been contacted regarding the child's referral to the Missouri First Steps program.
   - In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.
   - In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.

9. Select the reason for the referral.

   The **Referral Reason** section displays the reason for the child's referral, which can be selected as follows:

   - Select the **Medical Condition associated with developmental disability exists** check box to indicate that the child currently has a medical condition that is associated with a developmental disability. It is unchecked as the default.
   - Select the **Very low birth weight AND one or more of the following conditions exist** check box to indicate that the child had a very low birth weight and that another condition exists. It is unchecked as the default. When checked, select one or more of the additional check boxes available as applicable.
     - Select the **APGAR of 6 or less at 5 minutes** check box to indicate that the child had an APGAR score of six or less, five minutes after birth. It is unchecked as the default.
     - Select the **Intraventricular hemorrhage (IVH) (Grade II, III, or IV)** check box to indicate that the child had an intraventricular hemorrhage at birth of grade II, III, or IV. It is unchecked as the default.
     - Select the **Any Positive Pressure Ventilation greater than 48 hours, including ventilator or oscillator** check box to indicate that the child has been on a ventilator or an oscillator for at least 48 hours. It is unchecked as the default.
     - Select the **Resuscitation/code-event requiring chest compressions** check box to indicate that the child needed resuscitation. It is unchecked as the default.
   - In **Comments**, enter additional notes or details. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.

10. Click the **ICD9 Code** link to search for and select the specific ICD9 code to add. The ICD9 Code Search page displays.

11. Complete information in one or more of the following fields to perform a search:

    - In **ICD9**, enter the ICD9 code on which to search. You can enter partial information to widen your search. At least two characters must be entered, and up to 10 characters can be entered as necessary.
    - In **Description**, enter additional description information on which to search. You can enter partial information to widen your search. At least two characters must be entered, and up to 50 characters can be entered as necessary.

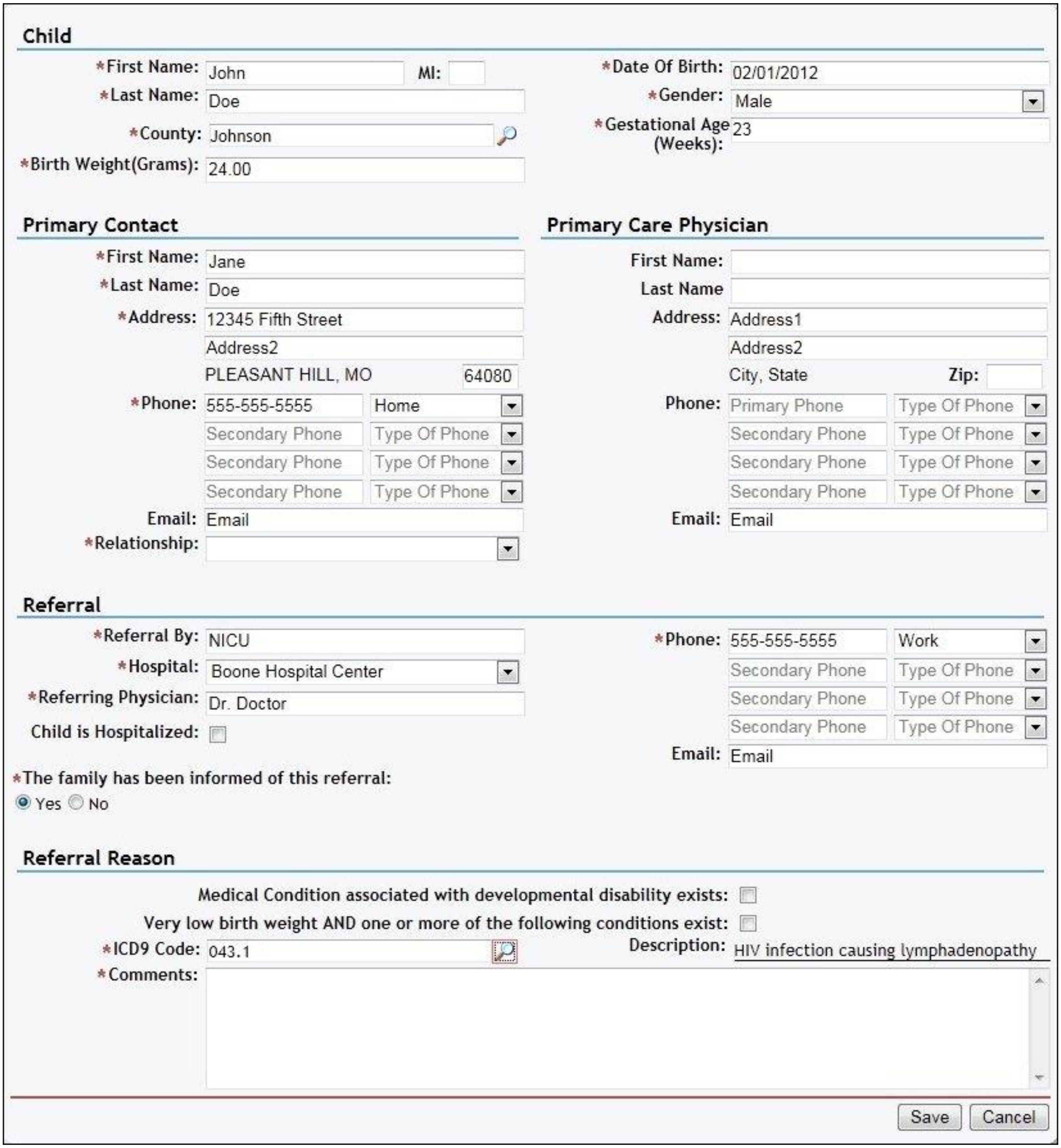
12. Click **Search**. The page refreshes and results found to match the search criteria display in the results table.

When **Search** is clicked, results found to match the search criteria specified are displayed in the following column(s) of the table:

- **ICD9 Code** displays the ICD9 code of the diagnosis.
- **Preferred** indicates whether the diagnosis is preferred.
- **Description** displays additional descriptive information.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

13. Double-click on an ICD9 code in the results table to select the code. The NICU Referral page refreshes and displays the selected code.



NICU Referral page (ICD9 Code selected)

14. Click the following command button(s) as necessary.

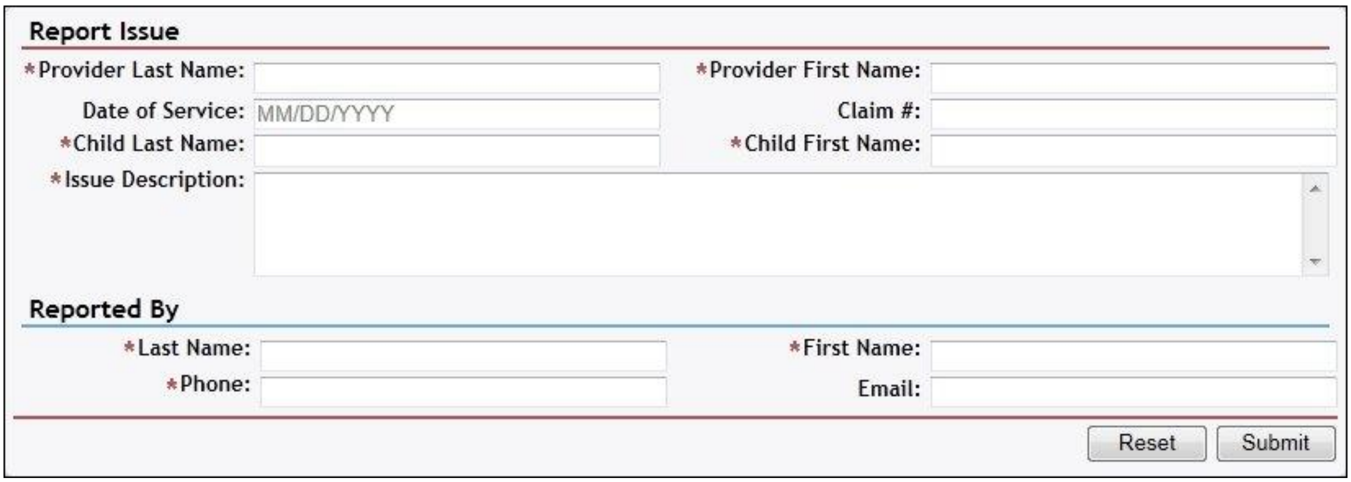
- Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
- Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Report Issue

Use this page to report an issue about a provider.

To access this page, complete the following steps:

- If you are currently logged into the Missouri First Steps system, select the **Logout** link at the top right of the page. You are logged out of the system and the Home page displays.
- On the **Families** menu, select the **Report An Issue** menu option.



Report Issue page (default view)

1. Complete the following information:
   - In **Provider Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
   - In **Provider First Name**, enter the first name of the person. You can enter up to 25 characters as necessary.
   - In **Date of Service**, enter the month, day, and year on which the service was administered. For more information about entering dates, see the Calendar Controls topic.
   - In **Claim #**, enter the specific claim identification number.
   - In **Child Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
   - In **Child First Name**, enter the first name of the person. You can enter up to 25 characters as necessary.
   - In **Issue Description**, view the issue being submitted.
   - In **Last Name**, enter the last name of the person. At least two characters must be entered. You can enter up to 40 characters as necessary.
   - In **First Name**, enter the first name of the person. At least two characters must be entered. You can enter up to 25 characters as necessary.
   - In **Phone**, enter the telephone number at which the person can be contacted.
   - In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
2. Click the following command button(s) as necessary.
   - Click **Submit** to save the issue to the database.

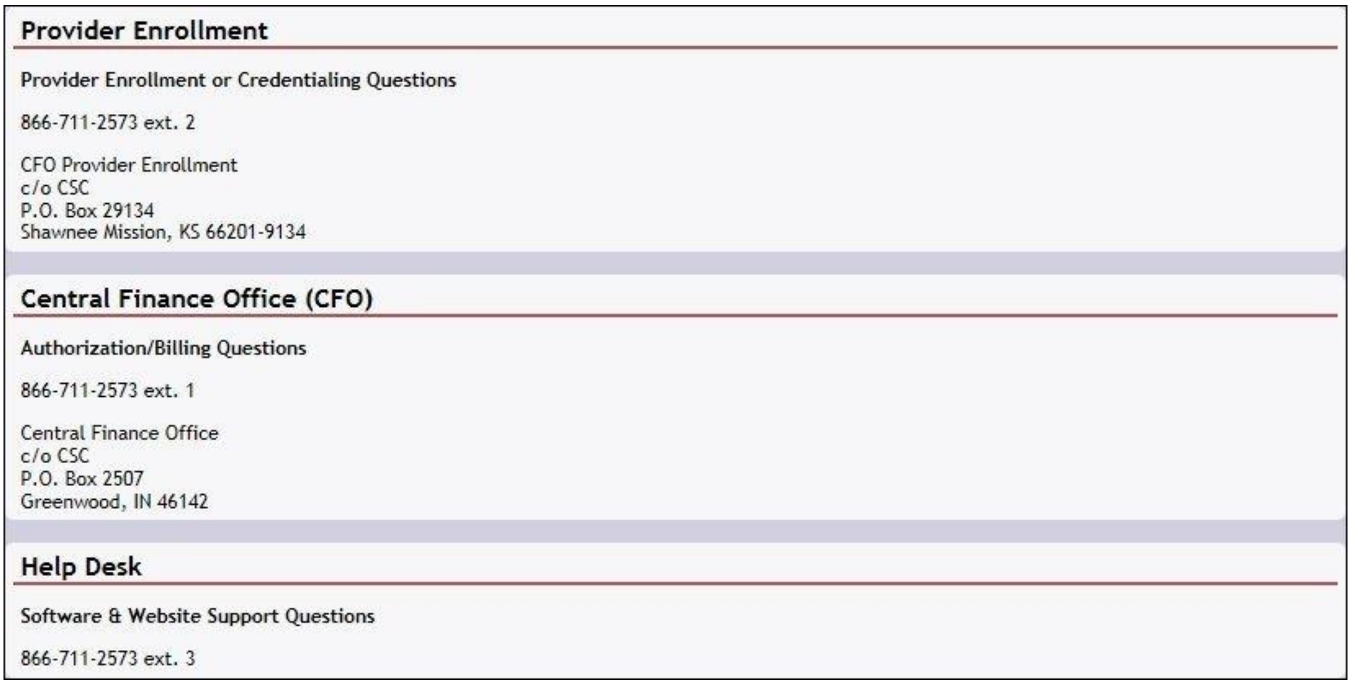
- Click the **Reset** button to discard any changes, reset all of the date to its last saved date, and continue working on this page.

Contact Information

Use this page to view a list of contacts for the Missouri First Steps program and/or this application.

To access this page, complete the following steps:

- If you are currently logged into the Missouri First Steps system, select the **Logout** link at the top right of the page. You are logged out of the system and the Home page displays.
- On the **Families** menu, select the **Contact Information** menu option.


Provider Enrollment

Provider Enrollment or Credentialing Questions

866-711-2573 ext. 2

CFO Provider Enrollment
c/o CSC
P.O. Box 29134
Shawnee Mission, KS 66201-9134

Central Finance Office (CFO)

Authorization/Billing Questions

866-711-2573 ext. 1

Central Finance Office
c/o CSC
P.O. Box 2507
Greenwood, IN 46142

Help Desk

Software & Website Support Questions

866-711-2573 ext. 3

Contact Information page (default view)

Complete the following steps to work with this page:

1. View the following information as necessary:
   - The **Provider Enrollment** section displays contact information for provider enrollment and/or provider credentials questions.
   - The **Central Finance Office (CFO)** section displays contact information for authorization and/or billing questions.
   - The **Help Desk** section displays contact information for help desk and application support questions.

Browser Compatibility

Use this page to view a list of contacts for the Missouri First Steps program.

To access this page, complete the following steps:

- If you are currently logged into the Missouri First Steps system, select the **Logout** link at the top right of the page. You are logged out of the system and the Home page displays.
- Select the **Browsers To Use** menu option.

Recommended Browsers

Internet Explorer 9

All features of this site will work properly in Internet Explorer 9.

Internet Explorer 8

All features of this site will work properly in Internet Explorer 8.

Firefox

All features of this site will work properly in Firefox.

Safari

All features of this site will work properly in Safari.

iPad/iPhone

This site will work properly on an iPad/iPhone with the exception of uploading/downloading documents and exporting reports.

Compatible Browsers

Opera

This website should work properly in Opera. However, it has not been tested.

Google Chrome

This website should work properly in Google Chrome. However, it has not been tested.

Android Phones

This website should work properly on Android Phones. However, it has not been tested.

Nook/Kindle

This website should work properly on Nook or Kindle devices. However, it has not been tested.

Unsupported Browsers

Internet Explorer 10

Internet Explorer 10 is not currently supported as it is still under development by Microsoft.

Browser Compatibility page (default view)

Complete the following steps to work with this page:

1. View the following information as necessary:
   - The **Recommended Browsers** section displays a list of browsers that are currently recommended for use with this application.
   - The **Compatible Browsers** section displays a list of browsers that are currently supported by the application.

- The **Unsupported Browsers** section displays a list of browsers that are currently not supported by the application.

Message Center

This page allows you to view a list of system-generated messages and notifications that have been sent to you and to display detailed information for a specific message such as the message subject and date received. You can also update your message preferences on this page as necessary.

To access this page, complete the following steps:

On the Home page:

- Click the **Message Center** link on the selection bar.

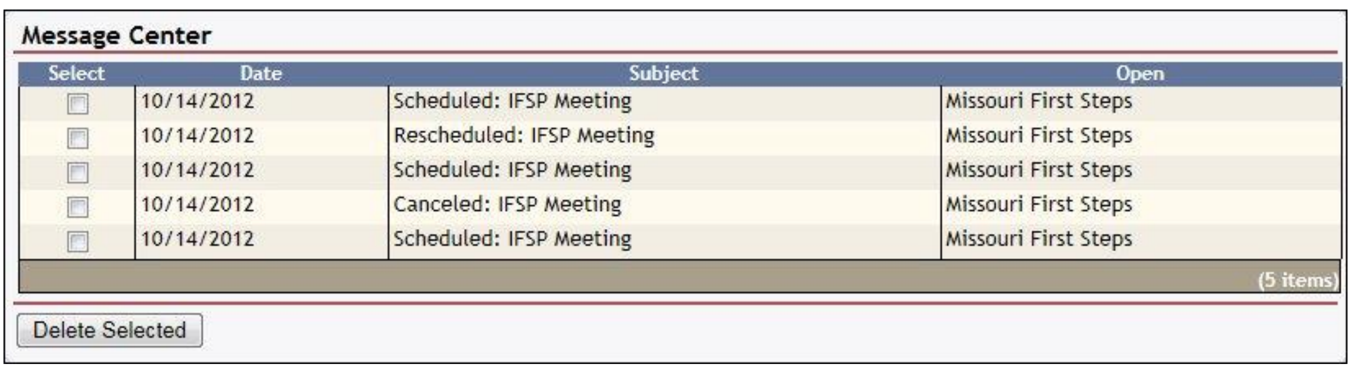
Home page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Child List** link to display the Child List quick links section of the Message Center page. This link is typically used when you have navigated using of the other links available on the selection bar (listed below).
- Click the **Message Center** link to display the Message Center page.
- Click the **Progress Notes Due** link to display the Provider Progress Notes Due.

Complete the following steps to work with this page:

1. The **Message Center** section displays a list of messages and notifications that have been sent to you.



Message Center

Select	Date	Subject	Open
☐	10/14/2012	Scheduled: IFSP Meeting	Missouri First Steps
☐	10/14/2012	Rescheduled: IFSP Meeting	Missouri First Steps
☐	10/14/2012	Scheduled: IFSP Meeting	Missouri First Steps
☐	10/14/2012	Canceled: IFSP Meeting	Missouri First Steps
☐	10/14/2012	Scheduled: IFSP Meeting	Missouri First Steps

(5 items)

Delete Selected

Message Center page (default view)

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

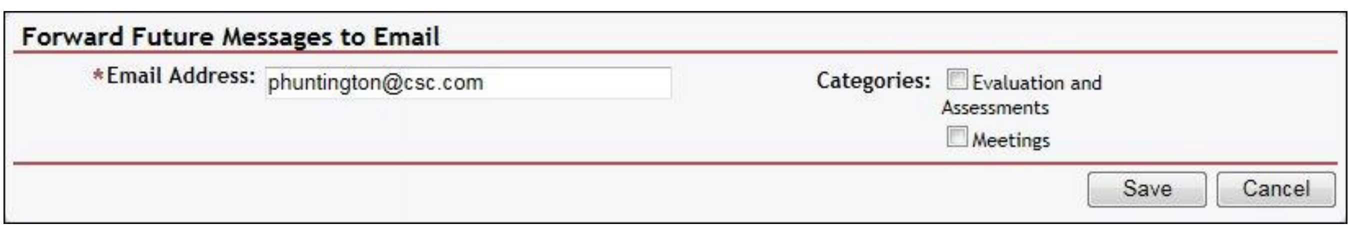
- The first column allows you to select multiple messages for deletion. Select the check boxes in the first column to indicate which messages to delete, then click the **Delete Selected** button to delete the selected messages.
- **Date** displays the date on which the system-generated message or notification was generated.
- **Subject** displays the subject of (or reason for) the message or notification.
- **Open** displays the system that generated the message or notification.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

Message Center page (details view)

3. View the detailed information for the message currently displayed.
4. Click the **Delete** button to delete the message currently displayed. A confirmation message displays asking if you are sure you want to delete the record.
5. The **Forward Future Messages to Email** section displays your current message preferences.



Message Center page (Forward Future Messages to Email view)

View the following information in this section as necessary:

- In **Email Address**, enter the electronic mail address to which your messages or notifications should be sent. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
- Select the **Evaluation and Assessments** check box to send all system-generated messages and notifications related to evaluation and assessments to the specified email address.

- Select the **Meetings** check box to send all system-generated messages and notifications related to meetings to the specified email address.

6. Click the following command button(s) as necessary.
   - Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Child Lists

My EI Kids

This page allows you to view a list of children currently assigned to you.

To access this page, complete the following steps:

On the Home page:

- In the **Child** section, select the **My EI Kids** link.

Complete the following steps to work with this page:

1. The **My EI Kids** section displays a list of children who are currently assigned to you.

My EI Kids

Last Name	First Name	Child ID	DOB	Gender	Status	Service Coordinator
achiever	Light-blue	390015912	6/2/2010	Male	IFSP	Kara Cole
action	Melon	450015857	9/28/2011	Female	Referral	Kara Cole

(2 items)

My EI Kids page (default view)

The table contains a list of all child records applicable. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Last Name** displays the person's last name.
- **First Name** displays the person's first name.
- **Child ID** displays the child's unique identification number.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Gender** displays the person's sex.
- **Status** indicates whether the individual is currently active or inactive.
- **Service Coordinator** displays the service coordinator's first and last name.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a child record in the table to display the Child Detail page.

Provider Progress Notes Due

This page allows you to view a list of children that currently need progress notes.

To access this page, complete the following steps:

On the Home page:

- Click the **Progress Notes Due** link on the selection bar.

  OR

- In the **Notes** section, select the **Progress Notes Due** link.

Home page (selection bar)

NOTE: If you accessed this page from the selection bar on the Home page, a selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Child List** link to display the Child List quick links section of the Provider Progress Notes Due page. This link is typically used when you have navigated using of the other links available on the selection bar (listed below).
- Click the **Message Center** link to display the Message Center page.
- Click the **Progress Notes Due** link to display the Provider Progress Notes Due.

Complete the following steps to work with this page:

1. The **Provider Progress Notes Due** section displays a list of children who are currently due for progress notes.

Provider Progress Notes Due

Child Name	Child ID	Effective Date	Service Coordinator	Admin Location
Dark-tangerine machine	380014041	7/11/2012	Courtney Schaffner	Greater St. Louis - Region 1
Dark-tangerine rifle	390014201	7/1/2012	Juli Darlington	St. Louis County - Region 2
Eggplant lettuce	380015350	3/1/2012	Ashley Johnston	St. Louis County - Region 2
				(3 items)

Provider Progress Notes Due page (default view)

The table contains a list of all child records applicable. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Child Name** displays the child's first and last name.
- **Child ID** displays the child's unique identification number.
- **Effective Date** displays the date on which the item becomes (or became) active or assigned.
- **Service Coordinator** displays the service coordinator's first and last name.
- **Admin Location** displays the name and region identification of the administrative location.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a child record in the table to display the Progress Notes page.

Meetings Scheduled

This page allows you to view a list of meetings that have been scheduled for children.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link.

Complete the following steps to work with this page:

1. The **Meetings Scheduled** section displays a children who currently have IFSP meetings scheduled.

Meetings Scheduled

Child Name	Child ID	IFSP Meeting Type	IFSP Meeting Date	Service Coordinator
Cinnamon Roll	380010012	Initial	03/02/2011	Christy Hooker
Dragon Fly	380010057	Inter-Periodic	03/14/2011	Christy Hooker
Lemonette Drop	380010007	Annual Review	07/01/2011	Christy Hooker
Chandler Bing	380010040	Initial	07/14/2011	Christy Hooker
Goober Bear	380010027	Initial	08/10/2011	Christy Hooker

(5 total items)

Meetings Scheduled page (default view)

The table contains a list of all child records applicable. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Child Name** displays the child's first and last name.
- **Child ID** displays the child's unique identification number.
- **IFSP Meeting Type** displays the meeting type (Initial, Annual Review, 6-Month Review, Inter-Periodic, etc.).
- **IFSP Meeting Date** displays the date on which the meeting is scheduled or occurred.
- **Service Coordinator** displays the service coordinator's first and last name.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a child record in the table to display the IFSP Meetings page.

Search

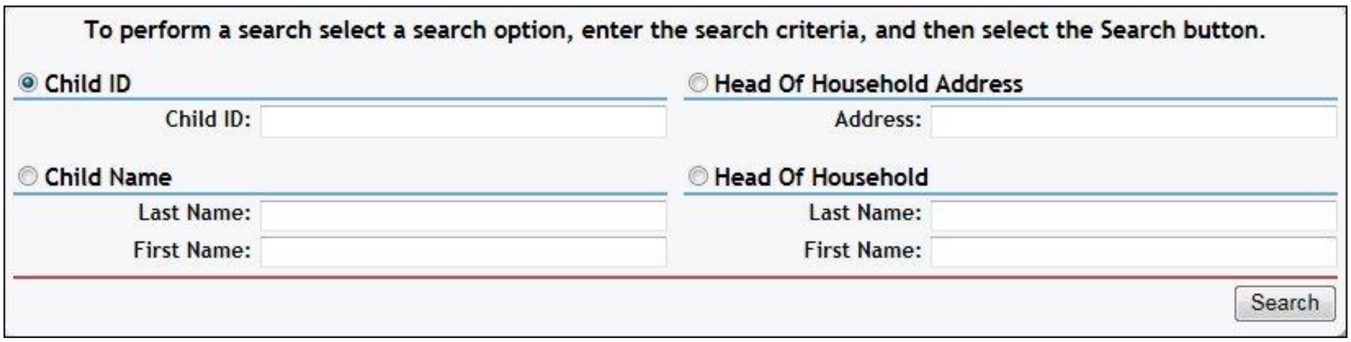
Child Search

This page allows you to enter information such as a child ID, child name, head of household address, or head of household name to search for a child.

To access this page, complete the following steps:

On the main menu bar:

- On the **Child Care Management** menu, select the **Child Search** menu option.



Child Search page (default view)

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

Complete the following steps to work with this page:

1. Complete information in one or more of the following controls in the **Child ID** and **Child Name** sections to perform a search by child:
   - In **Child ID**, enter the unique identification number of the child on which to search. The complete nine-digit child identification number is required to perform a search on child ID.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
2. Complete information in one or more of the following controls in the **Head of Household Address** and **Head of Household** sections to perform a search by head of household:
   - In **Address**, enter the street address on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 100 characters as necessary.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.

- In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.

3. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.

Search Results

Show: Active | Inactive | All

Last Name	First Name	Child ID	Date Of Birth	Gender	Status	County	Location	Service Coordinator	Referral Date
Duck	Huey	380010071	10/15/2008	Male	IFSP	St. Louis	Greater St. Louis - Region 1	Christy Hooker	01/15/2011
Dufus	Rufus	380010060	10/31/2010	Male	Eligibility	St. Louis City	Greater St. Louis - Region 1	Christy Hooker	12/12/2010
Dumpty	Humpty	380010070	10/15/2008	Male	IFSP	St. Louis	Greater St. Louis - Region 1	Christy Hooker	01/15/2011

(3 total items)

Child Search page (results found)

4. Filter the list of results displayed in the table as necessary by clicking the following links below the section heading:
   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

5. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Last Name** displays the person's last name.
   - **First Name** displays the person's first name.
   - **Child ID** displays the child's unique identification number.
   - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
   - **Gender** displays the person's sex.
   - **Status** indicates whether the individual is currently active or inactive.
   - **County** displays the name of the county in which the person resides (or practices).
   - **Location** displays the name of the SPOE location.
   - **Service Coordinator** displays the service coordinator's first and last name.
   - **Referral Date** displays the date on which the referral was first viewed at the EI location.

NOTE: You can double-click on a record in the table to view detailed information.

6. Double-click on a child record in the table to display the Child Detail page.

County Search

This page allows you to search for a county and select it to add to the details for a child.

To access this page, complete the following steps:

On the NICU Referral page:

- Click the button to the right of the **County** control in the **Child** section.

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

Complete the following steps to work with this page:

1. Complete information in one or more of the following controls to perform a search:
    - In **ZIP**, enter the ZIP code on which to search. You can enter partial information to widen your search.
    - In **Name**, enter the name of the county on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 50 characters as necessary.
2. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.
3. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
    - **City** displays the name of the city matching the search.
    - **Zip Code** displays the 5-digit zip code matching the search.
    - **County** displays the name of the county matching the search.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. Double click on a record in the results table to select a county. The previous page refreshes and displays and the selected county's name in the appropriate section.

ICD9 Code Search

This page allows you to search for an ICD9 code for a diagnosis.

To access this page, complete the following steps:

On the NICU Referral page:

- Click the button to the right of the **ICD9 Code** control in the **Referral Reason** section.

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

Complete the following steps to work with this page:

1. Complete information in one or more of the following controls to perform a search:
   - In **ICD9**, enter the ICD9 code on which to search. You can enter partial information to widen your search. At least two characters must be entered, and up to 10 characters can be entered as necessary.
   - In **Description**, enter additional description information on which to search. You can enter partial information to widen your search. At least two characters must be entered, and up to 50 characters can be entered as necessary.
2. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.
3. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **ICD9 Code** displays the ICD9 code of the diagnosis.
   - **Preferred** indicates whether the diagnosis is preferred.
   - **Description** displays additional descriptive information.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. Double click on a record in the results table to select an ICD9 code. The previous page refreshes and displays and the selected ICD9's code and description in the appropriate section.

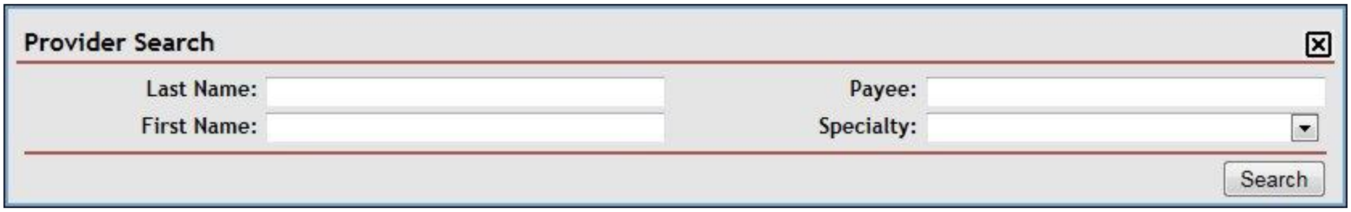
Provider Search

This page allows you to enter information such as a provider name, ZIP code, payee name or specialty to search for a provider and, depending on how this page is displayed, select a provider to add to the child record.

To access this page, complete the following steps:

On the Progress Notes page:

- Click either the **Add Daily** button or the **Add Monthly** button.
- Click the button.

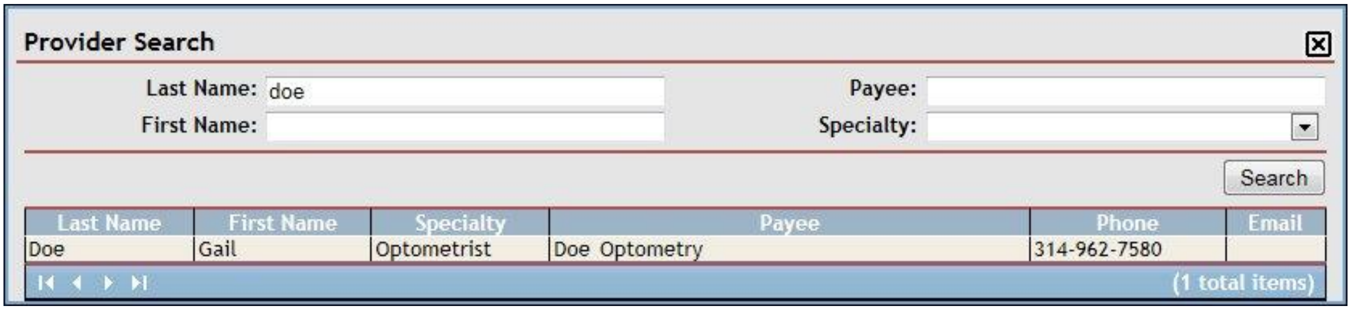


Provider Search page (default popup view)

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

Complete the following steps to work with this page:

1. Complete information in one or more of the following controls to perform a search:
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
   - In **Payee**, enter the name of the payee on which to search. You can enter partial information to widen your search. At least two characters must be entered.
   - In **Specialty**, select the specialty of the person on which to search from the drop-down list.
   - In **ZIP**, enter the ZIP code on which to search. You can enter partial information to widen your search.
2. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.



Provider Search page (results found popup view)

3. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Last Name** displays the person's last name.
   - **First Name** displays the person's first name.
   - **Specialty** displays the individual's specialty.
   - **Payee** displays the name of the person or group to which payment is made.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Email** displays the individual's electronic mail address.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. If you accessed this page from the Progress Notes page, double click on a record in the results table to select a provider. The Progress Notes page refreshes and displays the selected provider's details.

Child Care Management

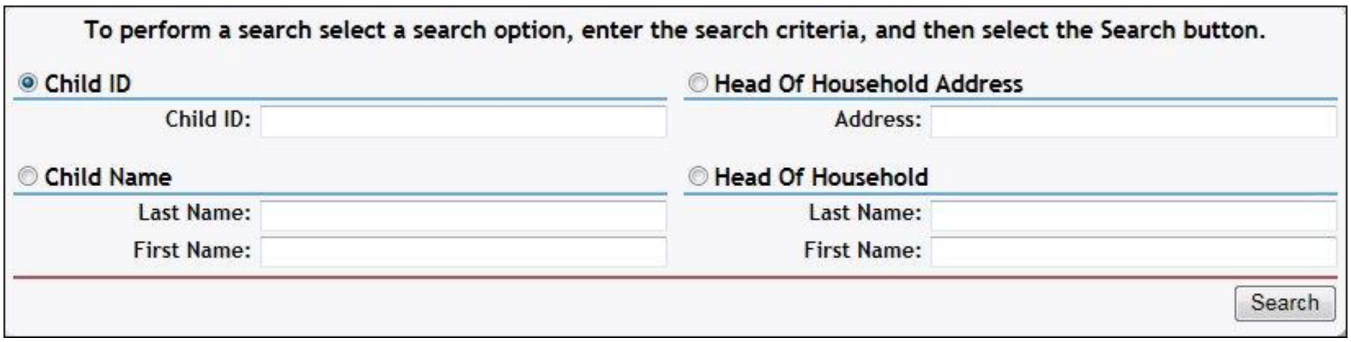
Child Search

This page allows you to enter information such as a child ID, child name, head of household address, or head of household name to search for a child.

To access this page, complete the following steps:

On the main menu bar:

- On the **Child Care Management** menu, select the **Child Search** menu option.



Child Search page (default view)

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

Complete the following steps to work with this page:

1. Complete information in one or more of the following controls in the **Child ID** and **Child Name** sections to perform a search by child:
   - In **Child ID**, enter the unique identification number of the child on which to search. The complete nine-digit child identification number is required to perform a search on child ID.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
2. Complete information in one or more of the following controls in the **Head of Household Address** and **Head of Household** sections to perform a search by head of household:
   - In **Address**, enter the street address on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 100 characters as necessary.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.

- In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.

3. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.

Search Results

Show: Active | Inactive | All

Last Name	First Name	Child ID	Date Of Birth	Gender	Status	County	Location	Service Coordinator	Referral Date
Duck	Huey	380010071	10/15/2008	Male	IFSP	St. Louis	Greater St. Louis - Region 1	Christy Hooker	01/15/2011
Dufus	Rufus	380010060	10/31/2010	Male	Eligibility	St. Louis City	Greater St. Louis - Region 1	Christy Hooker	12/12/2010
Dumpty	Humpty	380010070	10/15/2008	Male	IFSP	St. Louis	Greater St. Louis - Region 1	Christy Hooker	01/15/2011

(3 total items)

Child Search page (results found)

4. Filter the list of results displayed in the table as necessary by clicking the following links below the section heading:

- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

5. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Last Name** displays the person's last name.
- **First Name** displays the person's first name.
- **Child ID** displays the child's unique identification number.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Gender** displays the person's sex.
- **Status** indicates whether the individual is currently active or inactive.
- **County** displays the name of the county in which the person resides (or practices).
- **Location** displays the name of the SPOE location.
- **Service Coordinator** displays the service coordinator's first and last name.
- **Referral Date** displays the date on which the referral was first viewed at the EI location.

NOTE: You can double-click on a record in the table to view detailed information.

6. Double-click on a child record in the table to display the Child Detail page.

Child

Child Detail

This page allows you to view detailed information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the main menu bar:

- On the **Child Care Management** menu, select the **Child Search** menu option. The Child Search page displays.
- Enter search criteria and click **Search**. The **Children** table displays.
- Double-click on a child record in the table.

On the Home page:

- In the **Child** section, select the **My EI Kids** link. The My EI Kids page displays.
- Select filter criteria from the drop-down lists.
- Double-click on a child record in the table.

  OR
- In the **Family Cost Participation** section, select the **FCP Aging** link. The FCP Participant Aging page displays.
- Select filter criteria from the drop-down list.
- Double-click on a child record in the table.

On the Child Detail page:

- Click the **Child Detail** link on the selection bar.

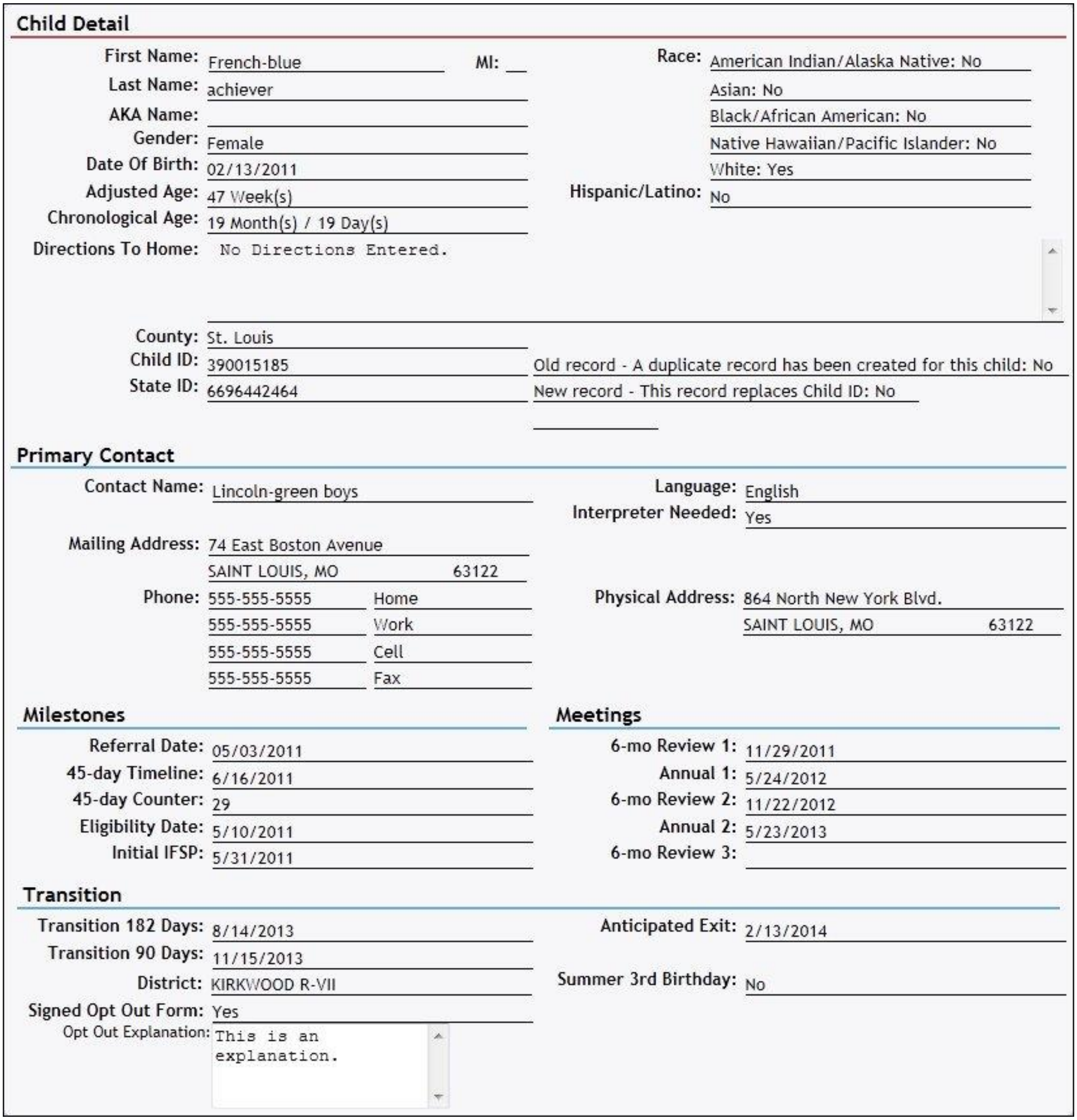
On the Child Search page:

- Search for a record.
- Double-click on a record in the results table.

Child Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Child Detail** link to display the Child Detail page.
- Click the **Service Coordination** link to display the Service Coordination page.
- Click the **EIT Primary Provider** link to display the EIT Primary Provider page.



Child Detail

First Name: French-blue MI:
Last Name: achiever
AKA Name:
Gender: Female
Date Of Birth: 02/13/2011
Adjusted Age: 47 Week(s)
Chronological Age: 19 Month(s) / 19 Day(s)
Race: American Indian/Alaska Native: No
Asian: No
Black/African American: No
Native Hawaiian/Pacific Islander: No
White: Yes
Hispanic/Latino: No
Directions To Home: No Directions Entered.
County: St. Louis
Child ID: 390015185
State ID: 6696442464
Old record - A duplicate record has been created for this child: No
New record - This record replaces Child ID: No

Primary Contact

Contact Name: Lincoln-green boys
Language: English
Interpreter Needed: Yes
Mailing Address: 74 East Boston Avenue
SAINT LOUIS, MO 63122
Phone: 555-555-5555 Home
555-555-5555 Work
555-555-5555 Cell
555-555-5555 Fax
Physical Address: 864 North New York Blvd.
SAINT LOUIS, MO 63122

Milestones

Referral Date: 05/03/2011
45-day Timeline: 6/16/2011
45-day Counter: 29
Eligibility Date: 5/10/2011
Initial IFSP: 5/31/2011

Meetings

6-mo Review 1: 11/29/2011
Annual 1: 5/24/2012
6-mo Review 2: 11/22/2012
Annual 2: 5/23/2013
6-mo Review 3:

Transition

Transition 182 Days: 8/14/2013
Transition 90 Days: 11/15/2013
District: KIRKWOOD R-VII
Signed Opt Out Form: Yes
Opt Out Explanation: This is an explanation.
Anticipated Exit: 2/13/2014
Summer 3rd Birthday: No

Child Detail page (default view)

Complete the following steps to work with this page:

1. The **Child Detail** section displays detailed information about the child. View the following information in this section as necessary:
   - **First Name** displays the person's first name.
   - **MI** displays the person's middle initial.
   - **Last Name** displays the person's last name.
   - **AKA Name** displays the person's nickname.

- **Gender** displays the person's sex.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Race** displays the race identified for the person.
- **Hispanic/Latino** displays whether the person's ethnicity is Hispanic or Latino.
- **Adjusted Age** displays the person's age in weeks up to 1 year.
- **Chronological Age** displays the person's age in months and days as calculated from birth to the current date.
- **Directions to Home** displays the directions to the person's home.
- **County** displays the name of the county in which the person resides (or practices).
- **Child ID** displays the child's unique identification number.
- **State ID** displays the state-provided identification number.
- **Old record - A duplicate record has been created for this child** indicates if this is the original child record from which a duplicate record has been created.
- **New record - This record replaces Child ID** indicates whether this record is a duplicate of another child record and, if so, the Child ID that was replaced.

2. The **Primary Contact** section displays information about the child's primary contact person. View the following information in this section as necessary:
   - **Contact Name** displays the first and last name of the contact person.
   - **Language** displays the person's primary language.
   - **Interpreter Needed** indicates whether an interpreter is needed for verbal communication.
   - **Mailing Address** displays the street address, city, two-letter state abbreviation, and zip code at which the person receives mail.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Physical Address** displays the street address, city, two-letter state abbreviation, and zip code at which the person resides.
3. The **Milestones** section displays previously recorded dates related to various milestones. View the following information in this section as necessary:
   - **Referral Date** displays the date on which the referral was first viewed at the EI location.
   - **45-day Timeline** displays the date 45 days from the **Referral Date**.
   - **45-day Counter** displays the number of days between the current date and the person's **Referral Date**.
   - **Eligibility Date** displays the child's eligibility determination date.
   - **Initial IFSP** displays the date of the person's first IFSP team meeting.
4. The **Meetings** section displays due dates for various meetings. View the following information in this section as necessary:
   - **6-mo Review 1** displays the date on which the person's initial six-month review is (or was) due. The date displayed is six months from the initial IFSP meeting. Once the meeting is finalized, the meeting date is displayed.
   - **Annual 1** displays the date on which the person's initial annual review is (or was) due. The date displayed is 365 calendar days from the initial IFSP meeting. Once the meeting is finalized, the meeting date is displayed.
   - **6-mo Review 2** displays the date on which the person's second six-month review is (or was) due. The date displayed is 183 calendar days after the **Annual 1** date. Once the meeting is finalized, the meeting date is displayed.
   - **Annual 2** displays the date on which the person's second annual review is (or was) due. The date displayed is 365 calendar days from the annual IFSP meeting. Once the meeting is finalized, the meeting date is displayed.

- **6-mo Review 3** displays the date on which the person's third six-month review is (or was) due. The date displayed is 183 calendar days after the annual IFSP meeting. Once the meeting is finalized, the meeting date is displayed.

5. The **Transition** section displays the child's most recent transition information. View the following information in this section as necessary:
   - **Transition 182 Days** displays the date on which the 182-day transition meeting is (or was) due. The date displayed is 182 calendar days prior to the child's third birthday.
   - **Anticipated Exit Date** displays the date on which the child is (or was) expected to end participation in the program. This date displayed is three calendar years after the child's date of birth.
   - **Transition 90 Days** displays the date on which the 90-day transition meeting is (or was) due. The date displayed is 90 calendar days prior to the child's third birthday.
   - **District** displays the name and/or number of the school district.
   - **Summer 3rd Birthday** indicates whether the child's date of birth is between 04/01 and 08/15.
   - The **Signed Opt Out Form** check box indicates whether the child's family has opted out of program participation and signed an opt out form.
   - **Opt Out Explanation** displays the explanation for opting out of program participation, if applicable.

Service Coordination

This page allows you to view a list of coordinators for a child and view detailed information for a coordinator. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the Child Detail page:

- Click the **Service Coordination** link on the selection bar.

Child Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Child Detail** link to display the Child Detail page.
- Click the **Service Coordination** link to display the Service Coordination page.
- Click the **EIT Primary Provider** link to display the EIT Primary Provider page.

Service Coordinator — Christy Hooker 314-453-9203

Show: Intake Coordinators | Service Coordinators | All

Coordinator Type	Coordinator Name	Agency Name	Phone	Start Date	End Date
Service	Christy Hooker	A.W. Holdings, LLC-Reg 1	314-453-9203	02/01/2011	
Intake	Christy Hooker	A.W. Holdings, LLC-Reg 1	314-453-9203	01/15/2011	02/21/2011

(2 total items)

Child Detail page (Service Coordinator default view)

Complete the following steps to work with this page:

1. The **Service Coordinator** section displays a list of coordinators associated with the child. Click the following links below the section heading to filter the list of records displayed in the table:
   - Click **Intake Coordinators** to only display results that are intake coordinators.
   - Click **Service Coordinators** to only display results that are service coordinators.
   - Click **All** to display all results available.

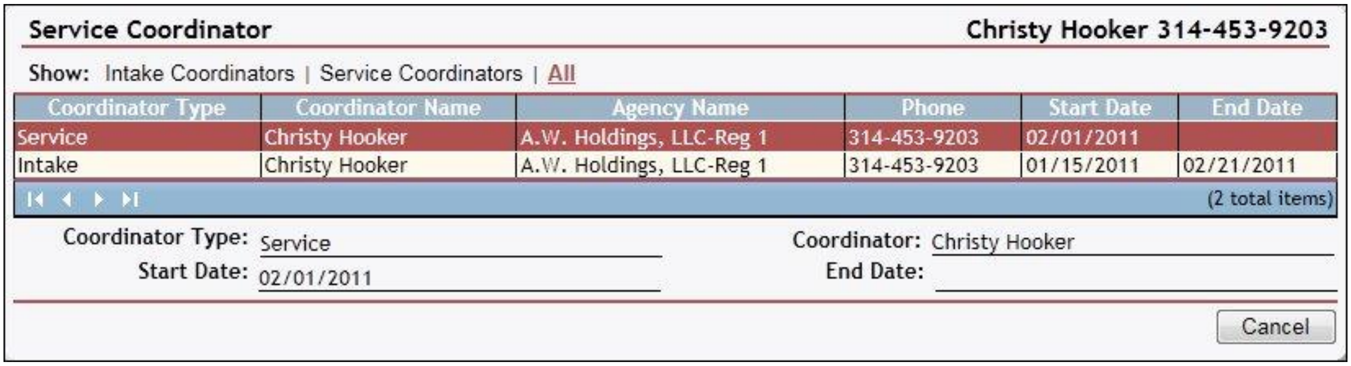
   The current coordinator's first name, last name, and phone number display in the top right of the section heading. This information is only displayed when a coordinator is currently active for the child.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Coordinator Type** indicates whether the coordinator is a service or intake coordinator.
   - **Coordinator Name** displays the person's first and last name.
   - **Agency Name** displays the name of the agency with which the person is associated (if applicable).

- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Child Detail page (Service Coordinator details view)

4. View the following information as necessary:

- **Coordinator Type** indicates whether the coordinator is a service or intake coordinator.
- **Coordinator** displays the person's first and last name.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

5. Click the following command button(s) as necessary.

- Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

EIT Primary Provider

This page allows you to view a list of EIT primary providers for a child and view detailed information for an EIT primary provider. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

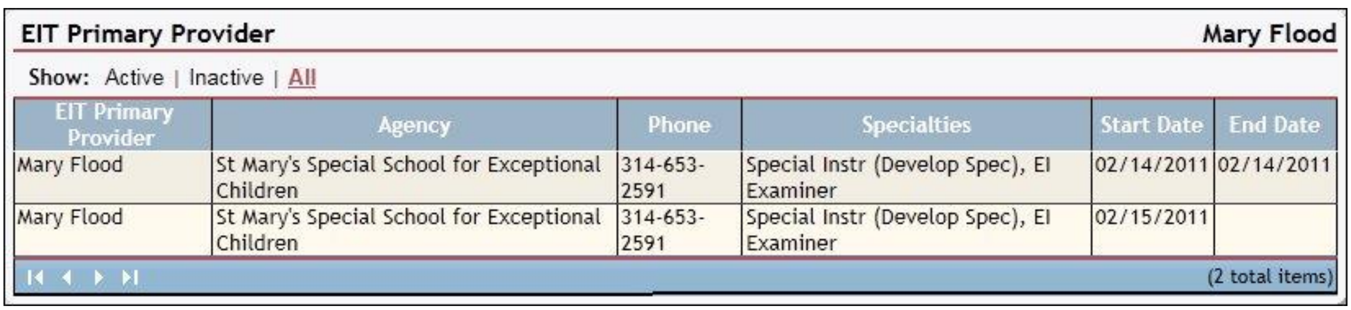
On the Child Detail page:

- Click the **EIT Primary Provider** link on the selection bar.

Child Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Child Detail** link to display the Child Detail page.
- Click the **Service Coordination** link to display the Service Coordination page.
- Click the **EIT Primary Provider** link to display the EIT Primary Provider page.


EIT Primary Provider — Mary Flood

Show: Active | Inactive | All

EIT Primary Provider	Agency	Phone	Specialties	Start Date	End Date
Mary Flood	St Mary's Special School for Exceptional Children	314-653-2591	Special Instr (Develop Spec), EI Examiner	02/14/2011	02/14/2011
Mary Flood	St Mary's Special School for Exceptional Children	314-653-2591	Special Instr (Develop Spec), EI Examiner	02/15/2011	

(2 total items)

Child Detail page (EIT Primary Provider default view)

Complete the following steps to work with this page:

1. The **EIT Primary Provider** section displays a list of EIT primary providers associated with the child. Click the following links below the section heading to filter the list of records displayed in the table:
   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

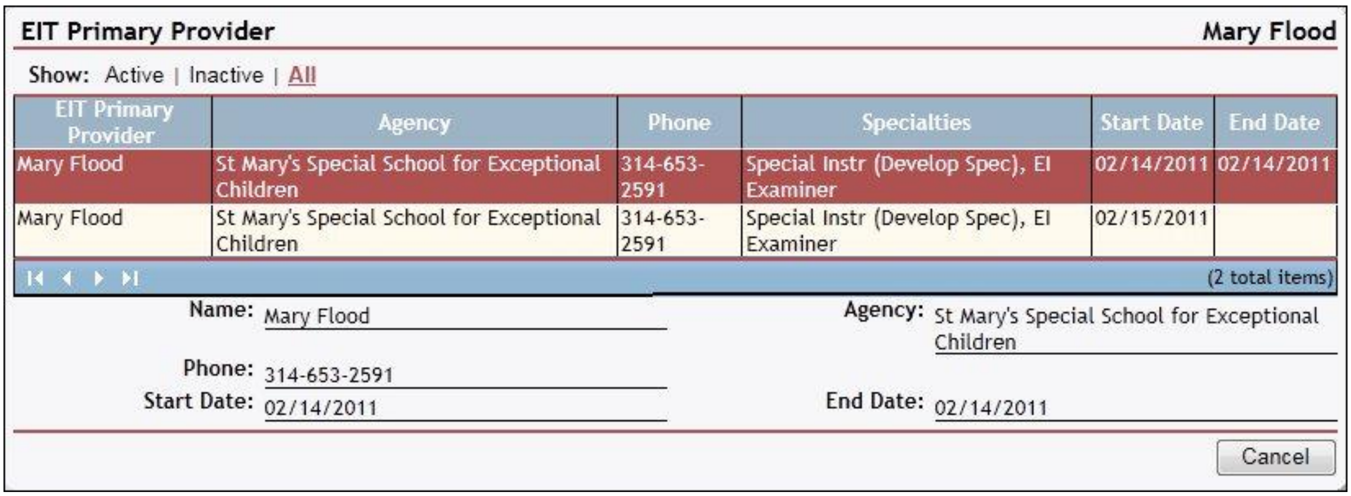
   The current EIT primary provider's first name and last name display in the top right of the section heading. This information is only displayed when an EIT primary provider is currently active for the child.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **EIT Primary Provider** displays the first and last name of the provider, or if there is no EI Team serving the child, the text "Child Not Being Served".
- **Agency** displays the name of the agency with which the person is associated (if applicable).
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Specialties** displays one or more of the individual's specialties.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Child Detail page (EIT Primary Provider details view)

4. View the following information as necessary:
5. View the following information as necessary:
   - **Name** displays the person's first and last name.
   - **Agency** displays the name of the agency with which the person is associated (if applicable).
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

Family

Family

This page allows you to work with family members for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

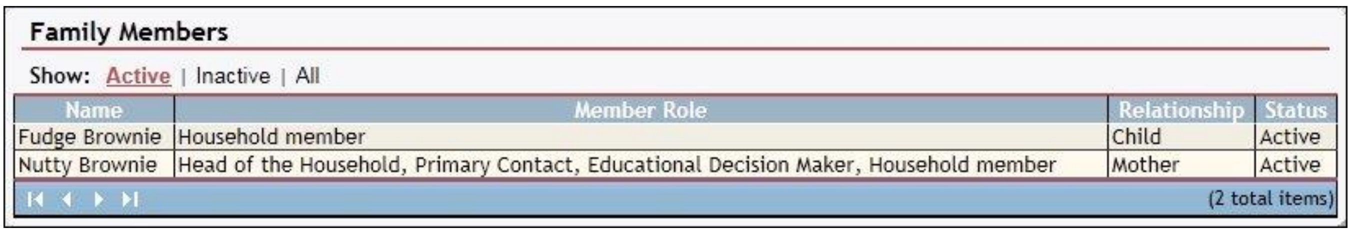
To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Family** menu option.

Complete the following steps to work with this page:

1. The **Family Members** section displays a list of family members for the child.



Family Members

Show: Active | Inactive | All

Name	Member Role	Relationship	Status
Fudge Brownie	Household member	Child	Active
Nutty Brownie	Head of the Household, Primary Contact, Educational Decision Maker, Household member	Mother	Active

(2 total items)

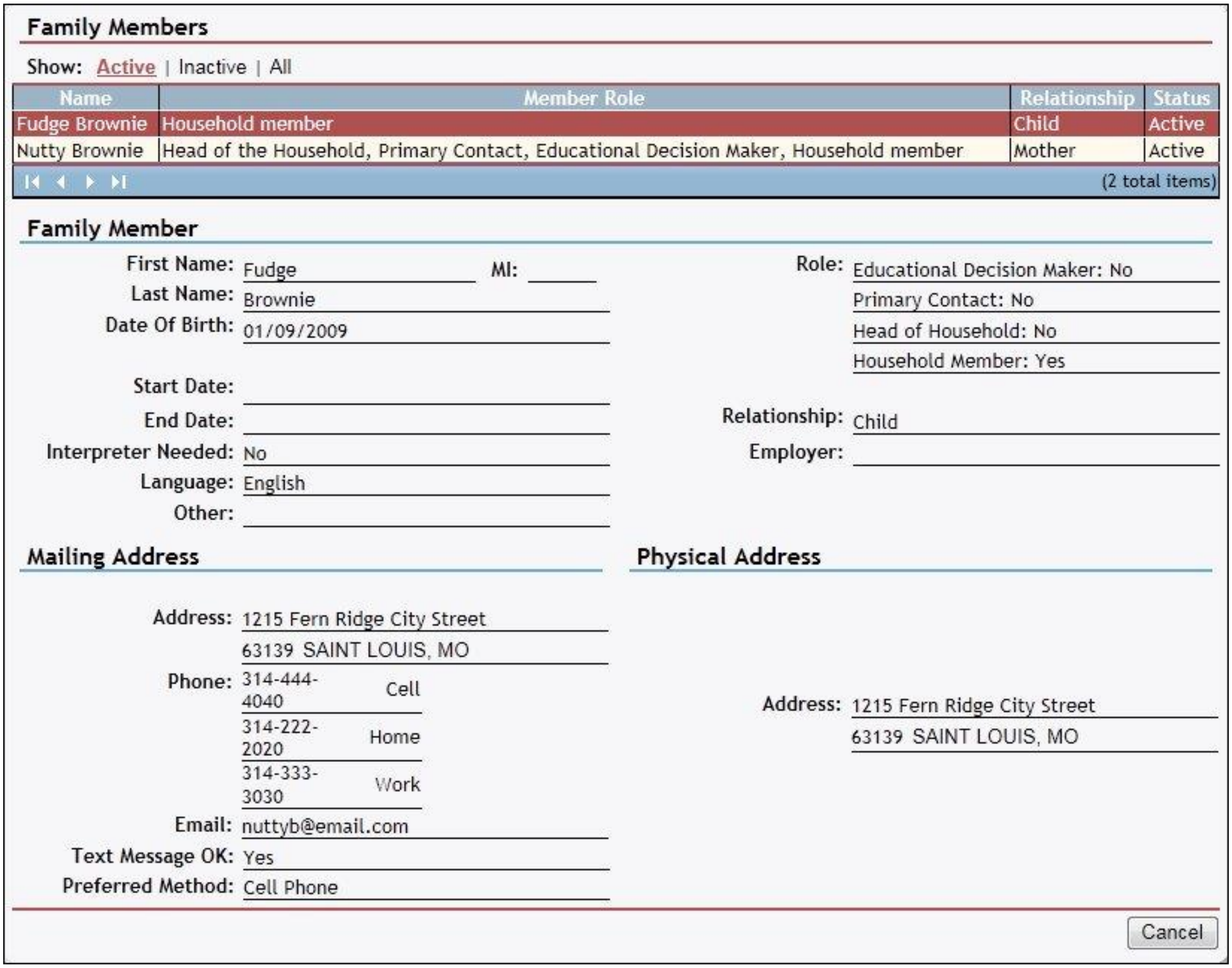
Family page (default view)

Click the following links below the section heading to filter the list of records displayed in the table:

- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Name** displays the person's first and last name.
   - **Member Role** displays the role currently assigned to the family member.
   - **Relationship** displays the person's relationship to the household.
   - **Status** indicates whether the individual is currently active or inactive.
3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
4. The **Family Member** section displays detailed information about the family member.



Family page (details view)

View the following information in this section as necessary:

- **First Name** displays the person's first name.
- **MI** displays the person's middle initial.
- **Last Name** displays the person's last name.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **SSN** displays the social security number for the person.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
- **Interpreter Needed** indicates whether an interpreter is needed for verbal communication.
- **Language** displays the person's primary language.
- **Role** displays the role currently assigned to the person.
- **Relationship** displays the person's relationship to the household.
- **Employer** displays the name of the person's employer.

5. The **Mailing Address** section contains the location at which the family member receives mail.

   View the following information in this section as necessary:

- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Email** displays the individual's electronic mail address.
- **Text Message OK** indicates whether it is acceptable to send text messages to the phone number listed.
- **Preferred Method** displays the person's preferred method of contact.

6. The **Physical Address** section contains the family member's residence information.

   View the following information in this section as necessary:

   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **ZIP** displays the complete five-digit ZIP code in which the residence (or office) is located.
   - **Household ID** displays the household's identification number.

7. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Intake

Intake

This page allows you to work with the intake details for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

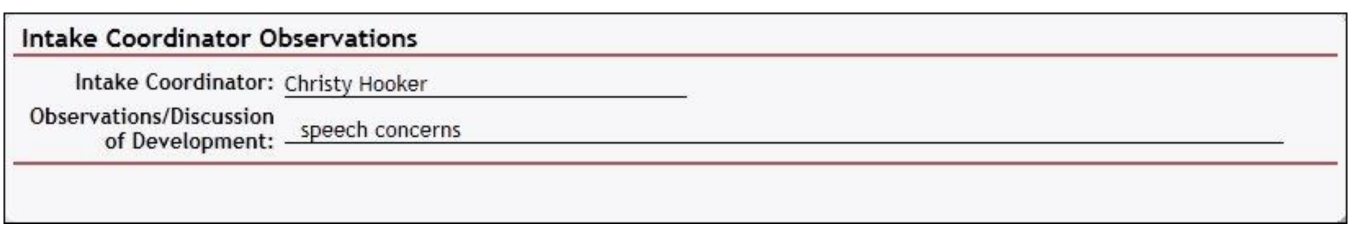
- On the **Child Detail** menu, select the **Intake** menu option.

Intake page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Observations** link to display the Intake Coordinator Observations page.
- Click the **Parental Consent** link to display the Parental Consent page.
- Click the **Vision Information** link to display the Vision Information page.
- Click the **Hearing Information** link to display the Hearing Information page.
- Click the **Parents as Teachers** link to display the Parents as Teachers page.
- Click the **Child Care** link to display the Child Care page.

The current **Enrollment Period** displays in the top right of the section heading.



Intake page (Observations details view)

Complete the following steps to work with this page:

1. The **Intake Coordinator Observations** section displays observation information. View the following information in this section as necessary:
   - **Intake Coordinator** displays the intake coordinator's first and last name.
   - **Observations/Discussion of Development** displays the intake coordinator's observations of the child and any discussions of the child's development.

Parental Consent

This page allows you to view parental consent information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Intake** menu option.
- Click the **Parental Consent** link on the selection bar.

Intake page (selection bar)

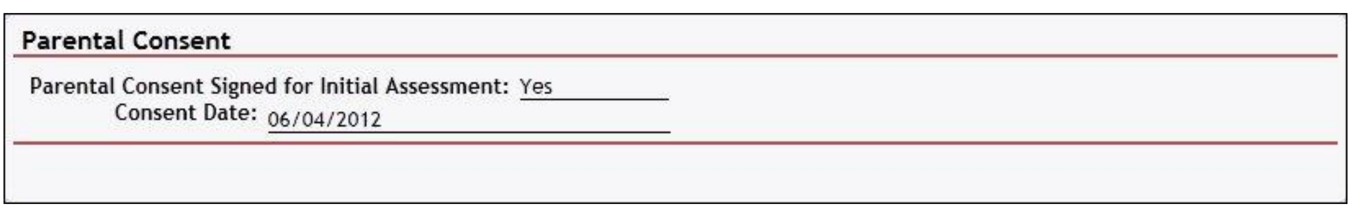
NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Observations** link to display the Intake Coordinator Observations page.
- Click the **Parental Consent** link to display the Parental Consent page.
- Click the **Vision Information** link to display the Vision Information page.
- Click the **Hearing Information** link to display the Hearing Information page.
- Click the **Parents as Teachers** link to display the Parents as Teachers page.
- Click the **Child Care** link to display the Child Care page.

The current **Enrollment Period** displays in the top right of the section heading.

Complete the following steps to work with this page:

1. The **Parental Consent** section displays parental consent information for the child.



Intake page (Parental Consent details view)

View the following information in this section as necessary:

- **Parental Consent Signed for Initial Assessment** indicates whether the parent has consented to the child's initial evaluation or assessment.
- **Consent Date** displays the date on which the parental consent was signed.

Vision Information

This page allows you to view vision screening information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Intake** menu option.
- Click the **Vision Information** link on the selection bar.

Intake page (selection bar)

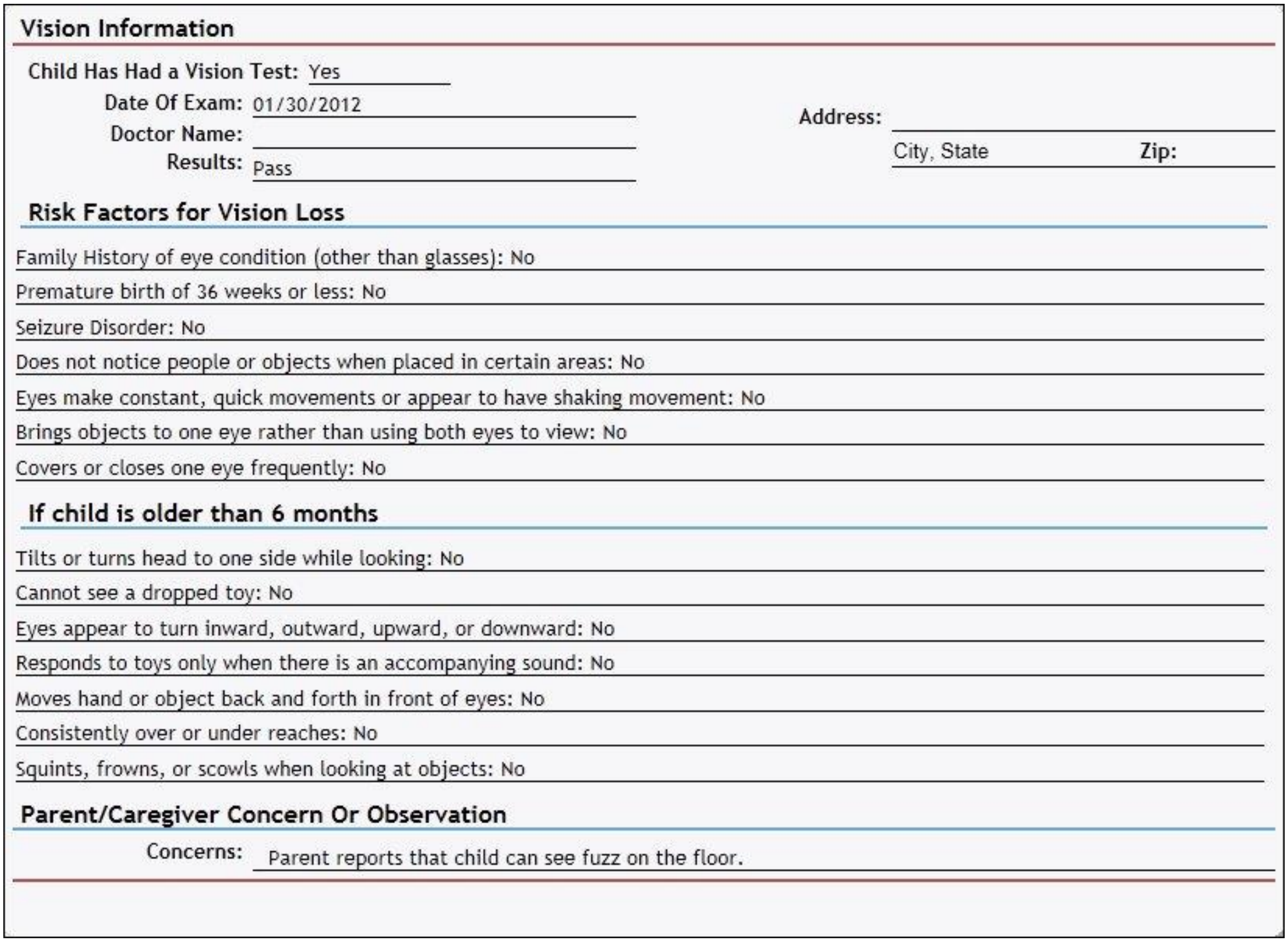
NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Observations** link to display the Intake Coordinator Observations page.
- Click the **Parental Consent** link to display the Parental Consent page.
- Click the **Vision Information** link to display the Vision Information page.
- Click the **Hearing Information** link to display the Hearing Information page.
- Click the **Parents as Teachers** link to display the Parents as Teachers page.
- Click the **Child Care** link to display the Child Care page.

The current **Enrollment Period** displays in the top right of the section heading.

Complete the following steps to work with this page:

1. The **Vision Information** section displays vision screening information for the child.



Vision Information

Child Has Had a Vision Test: Yes

Date Of Exam: 01/30/2012

Doctor Name:

Results: Pass

Address:

City, State Zip:

Risk Factors for Vision Loss

Family History of eye condition (other than glasses): No

Premature birth of 36 weeks or less: No

Seizure Disorder: No

Does not notice people or objects when placed in certain areas: No

Eyes make constant, quick movements or appear to have shaking movement: No

Brings objects to one eye rather than using both eyes to view: No

Covers or closes one eye frequently: No

If child is older than 6 months

Tilts or turns head to one side while looking: No

Cannot see a dropped toy: No

Eyes appear to turn inward, outward, upward, or downward: No

Responds to toys only when there is an accompanying sound: No

Moves hand or object back and forth in front of eyes: No

Consistently over or under reaches: No

Squints, frowns, or scowls when looking at objects: No

Parent/Caregiver Concern Or Observation

Concerns: Parent reports that child can see fuzz on the floor.

Vision Information page (details view)

View the following information in this section as necessary:

- **Child Has Had a Vision Test** indicates whether the child had a vision test administered.
- **Date of Exam** displays the date on which the test was administered.
- **Doctor Name** displays the first and last name of the examining physician.
- **Results** displays the results of the test that was administered.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Risk Factors for Vision Loss** indicates which risk factors may contribute to the person's loss of vision.
- **If child is older than 6 months** indicates which risk factors may contribute to the person's loss of vision for individuals over 6 months of age.
- **Parent/Caregiver Concern or Observation** displays any additional comments or concerns from the parent/caregiver regarding the child.

Hearing Information

This page allows you to view hearing screening information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Intake** menu option.
- Click the **Hearing Information** link on the selection bar.

Intake page (selection bar)

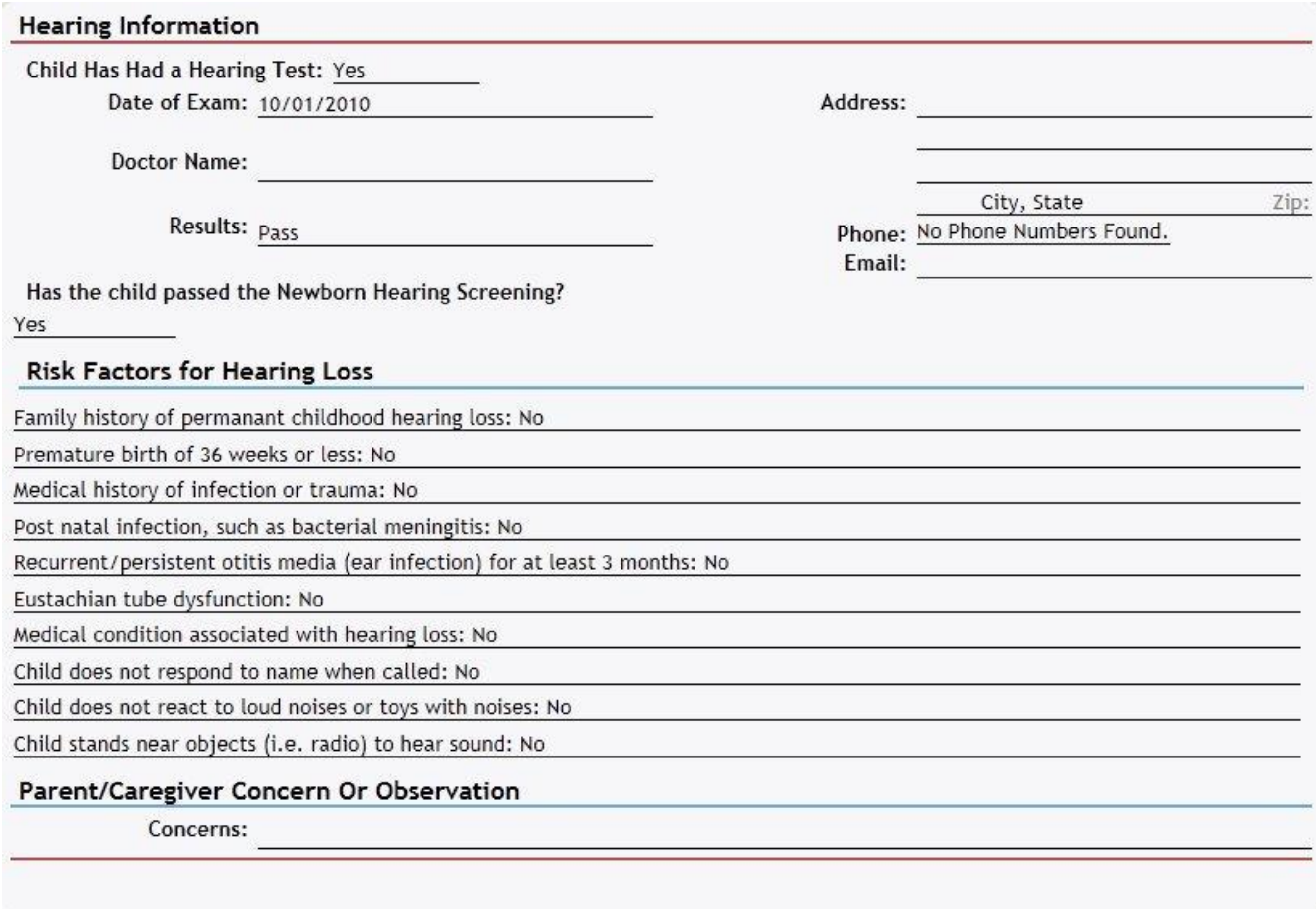
NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Observations** link to display the Intake Coordinator Observations page.
- Click the **Parental Consent** link to display the Parental Consent page.
- Click the **Vision Information** link to display the Vision Information page.
- Click the **Hearing Information** link to display the Hearing Information page.
- Click the **Parents as Teachers** link to display the Parents as Teachers page.
- Click the **Child Care** link to display the Child Care page.

The current **Enrollment Period** displays in the top right of the section heading.

Complete the following steps to work with this page:

1. The **Hearing Information** section displays hearing screening information for the child.



Hearing Information

Child Has Had a Hearing Test: Yes

Date of Exam: 10/01/2010

Doctor Name:

Results: Pass

Has the child passed the Newborn Hearing Screening?

Yes

Address:

City, State Zip:

Phone: No Phone Numbers Found.

Email:

Risk Factors for Hearing Loss

Family history of permanant childhood hearing loss: No

Premature birth of 36 weeks or less: No

Medical history of infection or trauma: No

Post natal infection, such as bacterial meningitis: No

Recurrent/persistent otitis media (ear infection) for at least 3 months: No

Eustachian tube dysfunction: No

Medical condition associated with hearing loss: No

Child does not respond to name when called: No

Child does not react to loud noises or toys with noises: No

Child stands near objects (i.e. radio) to hear sound: No

Parent/Caregiver Concern Or Observation

Concerns:

Hearing Information page (details view)

View the following information in this section as necessary:

- **Child Has Had a Hearing Test** indicates whether the child had a hearing test administered.
- **Date of Exam** displays the date on which the test was administered.
- **Doctor Name** displays the first and last name of the examining physician.
- **Results** displays the results of the test that was administered.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Email** displays the individual's electronic mail address.
- **Has the child passed the Newborn Hearing Screening** indicates whether the child passed the hearing screening test as a newborn.
- **Risk Factors for Hearing Loss** indicates which risk factors that may contribute to the person's loss of hearing.
- **Parent/Caregiver Concern or Observation** displays any additional comments or concerns from the parent/caregiver regarding the child.

Parents as Teachers

This page allows you to view information about parents who also act as teachers for the child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Intake** menu option.
- Click the **Parents as Teachers** link on the selection bar.

Intake page (selection bar)

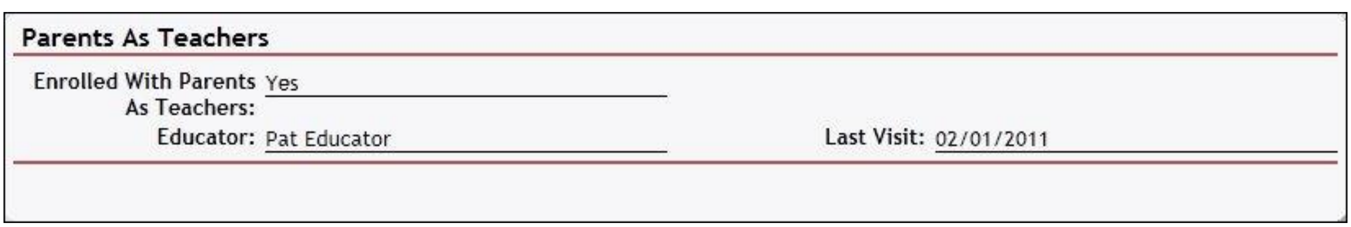
NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Observations** link to display the Intake Coordinator Observations page.
- Click the **Parental Consent** link to display the Parental Consent page.
- Click the **Vision Information** link to display the Vision Information page.
- Click the **Hearing Information** link to display the Hearing Information page.
- Click the **Parents as Teachers** link to display the Parents as Teachers page.
- Click the **Child Care** link to display the Child Care page.

The current **Enrollment Period** displays in the top right of the section heading.

Complete the following steps to work with this page:

1. The **Parents As Teachers** section displays information about parents who also act as teachers for the child.



Parents As Teachers page (details view)

View the following information in this section as necessary:

- **Enrolled With Parents As Teachers** indicates whether the person was Enrolled in the program with a parent as a teacher or educator.

- **Educator** displays the first and last name of the teacher.
- **Last Visit** displays the date of the last visit.

Child Care

This page allows you to view child care details for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Intake** menu option.
- Click the **Child Care** link on the selection bar.

Intake page (selection bar)

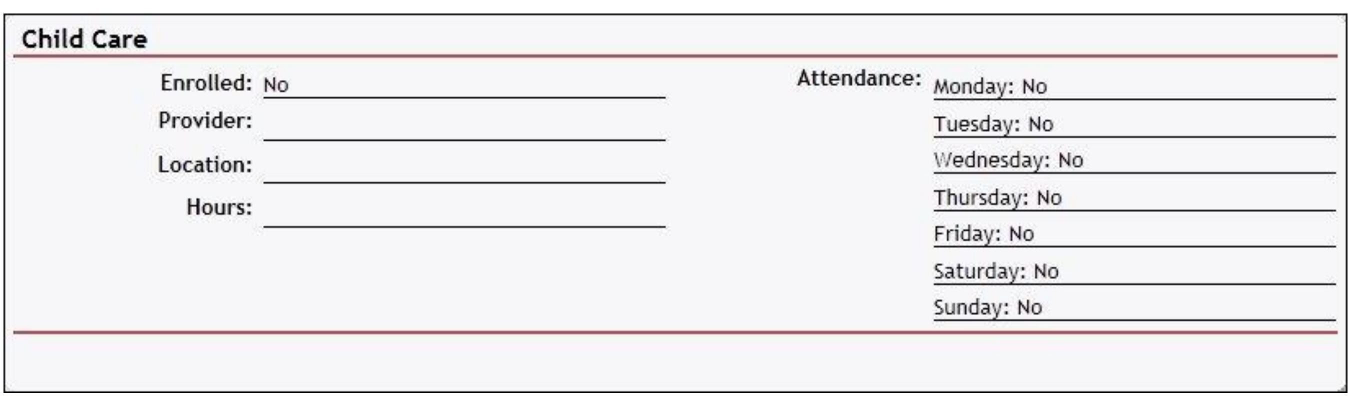
NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Observations** link to display the Intake Coordinator Observations page.
- Click the **Parental Consent** link to display the Parental Consent page.
- Click the **Vision Information** link to display the Vision Information page.
- Click the **Hearing Information** link to display the Hearing Information page.
- Click the **Parents as Teachers** link to display the Parents as Teachers page.
- Click the **Child Care** link to display the Child Care page.

The current **Enrollment Period** displays in the top right of the section heading.

Complete the following steps to work with this page:

1. The **Child Care** section displays care information for the child.



Child Care page (details view)

View the following information in this section as necessary:

- **Enrolled** indicates whether the person is currently is Enrolled.
- **Provider** displays the name of the service provider.
- **Location** displays the name of the SPOE location.
- **Hours** displays the location's business hours.
- **Attendance** indicates the days of the week in which the child is in child care.

Health

Health

This page allows you to view detailed health information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

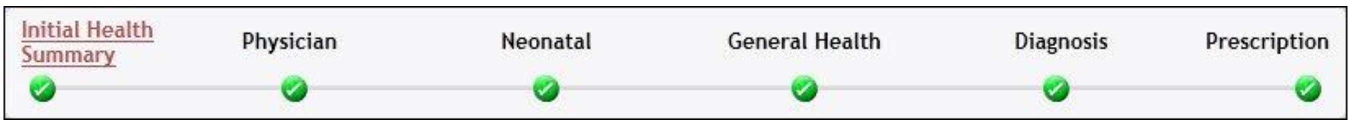
To access this page, complete the following steps:

On the Home page:

- In the **Notes** section, select the **Scripts Due** link. The Prescriptions Due page displays.
- Double-click on a record in the table.

On the Child Detail page:

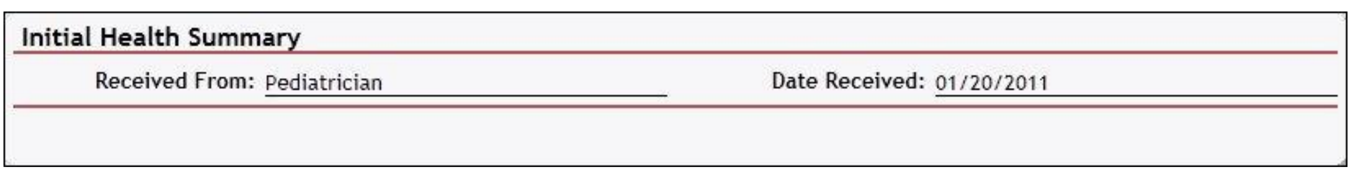
- On the **Child Detail** menu, select the **Health** menu option.



Health page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Initial Health Summary** link to display the Initial Health Summary page.
- Click the **Physician** link to display the Physician page.
- Click the **Neonatal** link to display the Neonatal page.
- Click the **General Health** link to display the General Health page.
- Click the **Diagnosis** link to display the Diagnosis page.
- Click the **Prescription** link to display the Physician Script page.



Health page (Initial Health Summary default view)

Complete the following steps to work with this page:

1. The **Initial Health Summary** section displays information about the initial health summary. View the following information in this section as necessary:
   - **Received From** displays the name of the individual from whom the data was received.
   - **Date Received** displays the date on which the data was received.

Physician

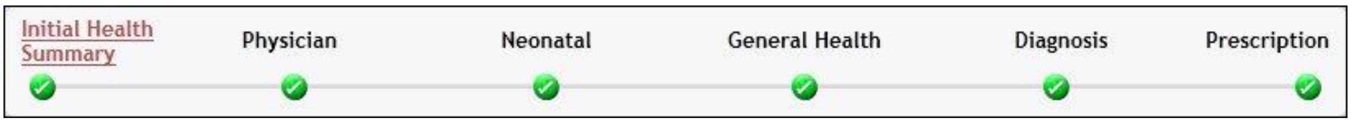
This page allows you to view detailed physician information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

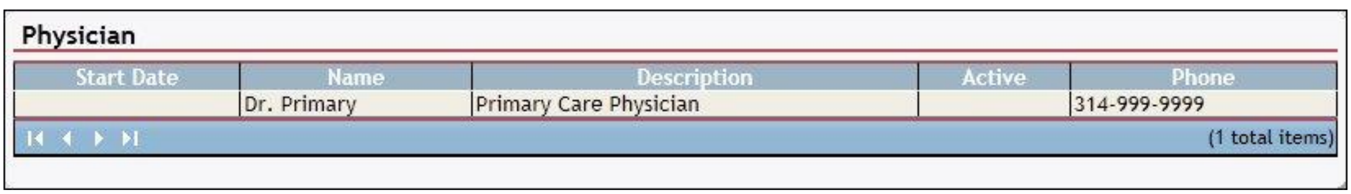
- On the **Child Detail** menu, select the **Health** menu option.
- Click the **Physician** link on the selection bar.



Health page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Initial Health Summary** link to display the Initial Health Summary page.
- Click the **Physician** link to display the Physician page.
- Click the **Neonatal** link to display the Neonatal page.
- Click the **General Health** link to display the General Health page.
- Click the **Diagnosis** link to display the Diagnosis page.
- Click the **Prescription** link to display the Physician Script page.


Physician

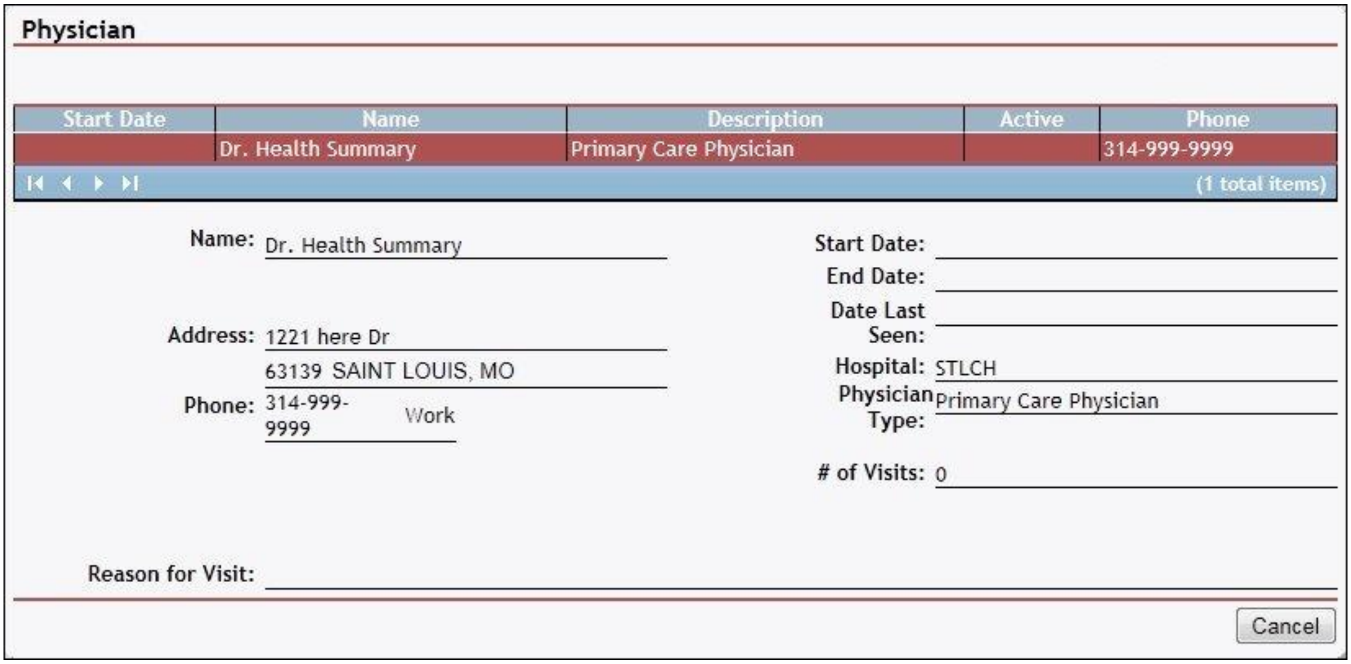
Start Date	Name	Description	Active	Phone
	Dr. Primary	Primary Care Physician		314-999-9999

(1 total items)

Health page (Physician default view)

Complete the following steps to perform this tutorial:

1. The **Physician** section displays a list of physicians for the child. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **Name** displays the person's first and last name.
   - **Description** displays additional descriptive information.
   - **Active** displays the date range for which the person was associated with the child record.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Health page (Physician details view)

3. The **Physician** section displays detailed information about the physician. View the following information in this section as necessary:
   - **Name** displays the person's first and last name.
   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Reason for Visit** displays the purpose of the visit.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
   - **Date Last Seen** displays the date on which the person was last seen by the physician.
   - **Hospital** displays the name of the hospital with which the physician is affiliated.
   - **Physician Type** displays the specific role assigned to the physician from the drop-down list.
   - **# of Visits** displays the number of times the person has been seen by the physician.
4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Neonatal

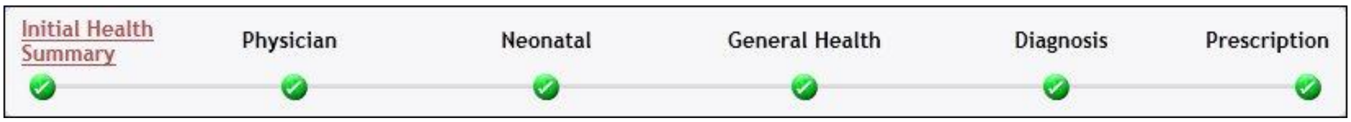
This page allows you to view detailed neonatal information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

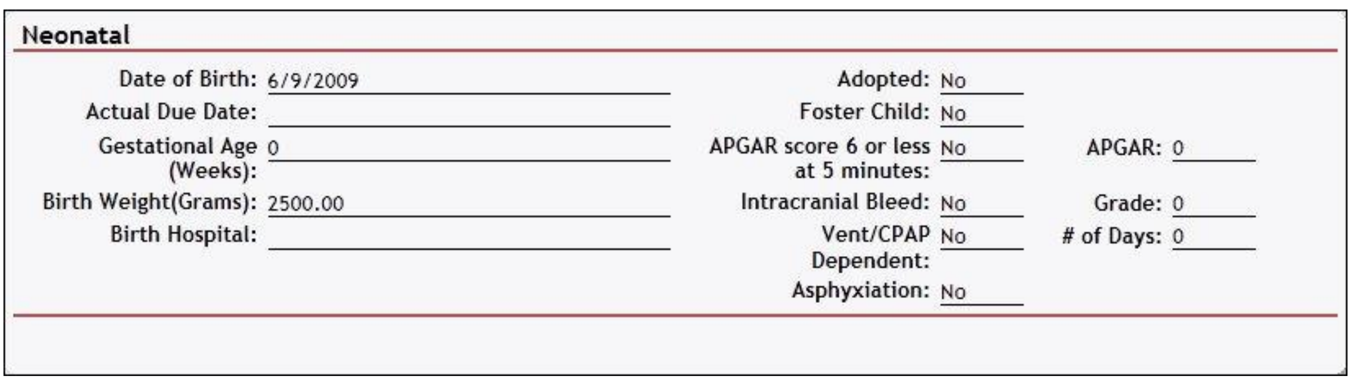
- On the **Child Detail** menu, select the **Health** menu option.
- Click the **Neonatal** link on the selection bar.



Health page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Initial Health Summary** link to display the Initial Health Summary page.
- Click the **Physician** link to display the Physician page.
- Click the **Neonatal** link to display the Neonatal page.
- Click the **General Health** link to display the General Health page.
- Click the **Diagnosis** link to display the Diagnosis page.
- Click the **Prescription** link to display the Physician Script page.



Neonatal

Date of Birth: 6/9/2009
Actual Due Date:
Gestational Age (Weeks): 0
Birth Weight(Grams): 2500.00
Birth Hospital:
Adopted: No
Foster Child: No
APGAR score 6 or less at 5 minutes: No
APGAR: 0
Intracranial Bleed: No
Grade: 0
Vent/CPAP Dependent: No
# of Days: 0
Asphyxiation: No

Health page (Neonatal default view)

Complete the following steps to perform this tutorial:

1. The **Neonatal** section displays detailed neonatal information for the child. View the following information in this section as necessary:
   - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
   - **Actual Due Date** displays the month, day, and year on which the person is or was expected to be born.
   - **Gestational Age (Weeks)** displays the person's gestational age in weeks.

- **Birth Weight (Grams)** displays the person's birth weight in grams.
- **Birth Hospital** displays the name of the hospital at which the person was born.
- **Adopted** indicates whether the person was placed for adoption.
- **Foster Child** indicates whether the person was placed in foster care.
- **APGAR score 6 or less at 5 minutes** indicates whether the child had an APGAR score of six or less five minutes after birth. When **Yes**, the APGAR score is also displayed.
- **Intracranial Bleed** indicates whether the child had an intracranial bleed at birth. When **Yes**, the grade is also displayed.
- **Vent/CPAP Dependent** indicates whether the person was dependent on a ventilator or CPAP after birth and for how long. When **Yes**, the number of days is also displayed.
- **Asphyxiation** indicates whether the child asphyxiated.

General Health

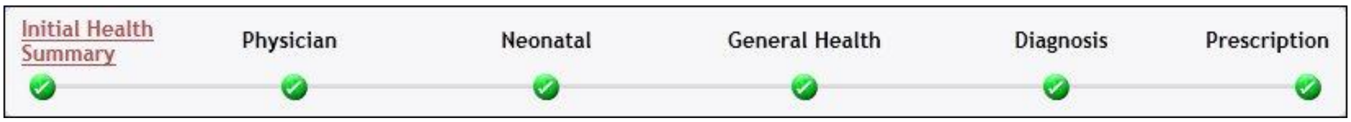
This page allows you to view general health concerns for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Health** menu option.
- Click the **General Health** link on the selection bar.



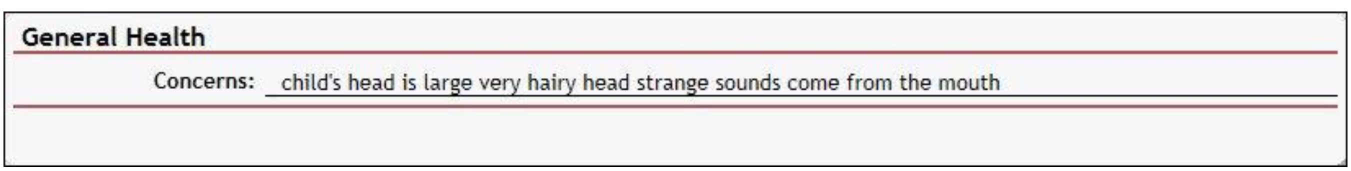
Health page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Initial Health Summary** link to display the Initial Health Summary page.
- Click the **Physician** link to display the Physician page.
- Click the **Neonatal** link to display the Neonatal page.
- Click the **General Health** link to display the General Health page.
- Click the **Diagnosis** link to display the Diagnosis page.
- Click the **Prescription** link to display the Physician Script page.

Complete the following steps to perform this tutorial:

1. The **General Health** section displays general health concerns for the child.



General Health page (details view)

View the following information in this section as necessary:

- **Concerns** displays any comments or concerns regarding the child's general health.

Diagnosis

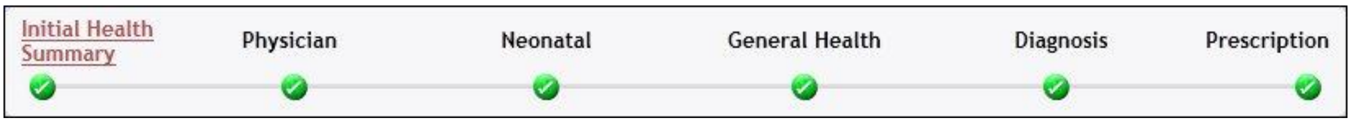
This page allows you to view detailed diagnosis information for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

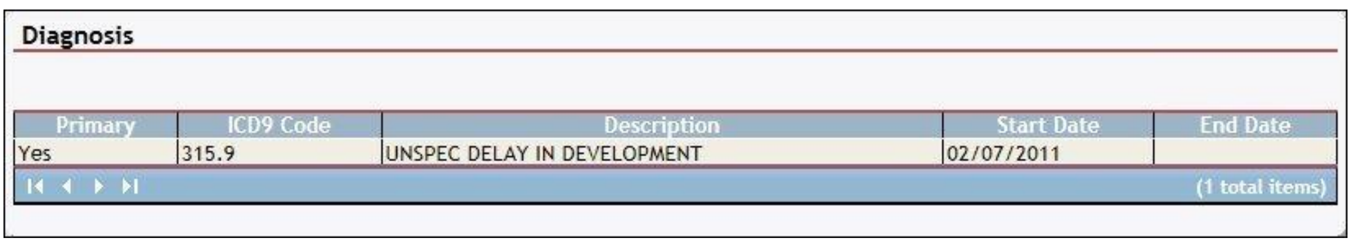
- On the **Child Detail** menu, select the **Health** menu option.
- Click the **Diagnosis** link on the selection bar.



Health page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Initial Health Summary** link to display the Initial Health Summary page.
- Click the **Physician** link to display the Physician page.
- Click the **Neonatal** link to display the Neonatal page.
- Click the **General Health** link to display the General Health page.
- Click the **Diagnosis** link to display the Diagnosis page.
- Click the **Prescription** link to display the Physician Script page.



Diagnosis

Primary	ICD9 Code	Description	Start Date	End Date
Yes	315.9	UNSPEC DELAY IN DEVELOPMENT	02/07/2011	

(1 total items)

Health page (Diagnosis default view)

Complete the following steps to perform this tutorial:

1. The **Diagnosis** section displays a list of diagnoses for the child. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Primary** indicates whether this is the primary diagnosis or determination.
   - **ICD9 Code** displays the ICD9 code of the diagnosis.
   - **Description** displays additional descriptive information.
   - **Start Date** displays the date on which the activity begins.
   - **End Date** displays the date on which the activity is (or was) completed.
2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

Health page (Diagnosis details view)

3. The **Diagnosis** section displays detailed information about the diagnosis. View the following information in this section as necessary:
   - **ICD9 Code** displays the ICD9 code of the diagnosis.
   - **Primary** indicates whether this is the primary diagnosis or determination.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **Description** displays additional descriptive information.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Physician Script

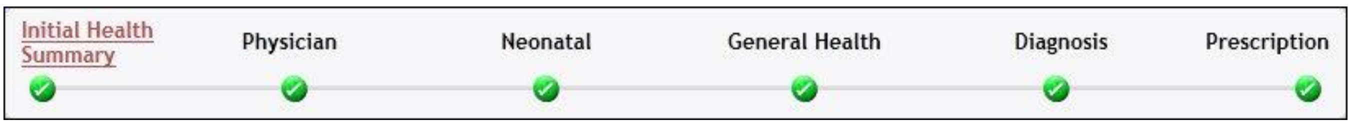
This page allows you to view physician scripts for a child. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: After a child has been deemed eligible, the data on this page is read-only and cannot be updated.

To access this page, complete the following steps:

On the Child Detail page:

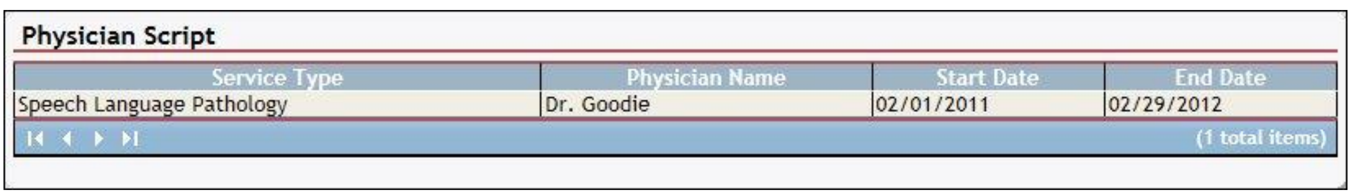
- On the **Child Detail** menu, select the **Health** menu option.
- Click the **Prescription** link on the selection bar.



Health page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Initial Health Summary** link to display the Initial Health Summary page.
- Click the **Physician** link to display the Physician page.
- Click the **Neonatal** link to display the Neonatal page.
- Click the **General Health** link to display the General Health page.
- Click the **Diagnosis** link to display the Diagnosis page.
- Click the **Prescription** link to display the Physician Script page.



Physician Script

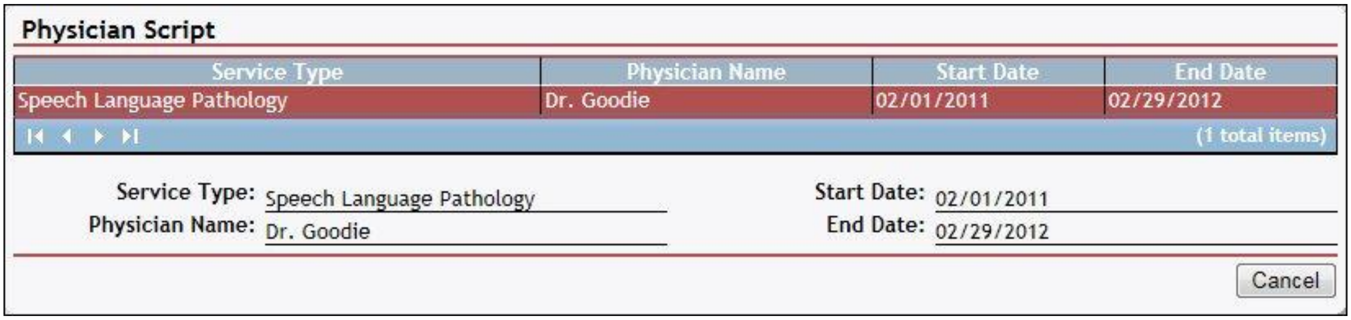
Service Type	Physician Name	Start Date	End Date
Speech Language Pathology	Dr. Goodie	02/01/2011	02/29/2012

(1 total items)

Health page (Physician Script default view)

Complete the following steps to perform this tutorial:

1. The **Physician Script** section displays a list of prescriptions for the child. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Service Type** displays the type of service provided.
   - **Physician Name** displays the person's first and last name.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Health page (Physician Script details view)

3. The **Physician Script** section displays detailed information about the prescription. View the following information in this section as necessary:
   - **Service Type** displays the type of service provided.
   - **Physician Name** displays the person's first and last name.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Eval and Assess

Evaluations and Assessments

This page allows you to view evaluation and assessment requests for a child. Depending on the method of access, your current permissions, and the type of request, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Eval and Assess** menu option.

Requests

Request Date	Type	Provider	Dev Area(s)	Status	Reviewed	Reason
10/2/2012	Developmental Information	Margaret Callahan	Adaptive, Cognitive			IFSP Development
10/2/2012	Evaluation/Assessment Request	Kari Done	Adaptive, Cognitive			IFSP Development
2/29/2012	DAYC Request	Shireen Kinzy	All	Reviewed	5/31/2012	Eligibility Determination
						(3 items)

Evaluations and Assessments page (default view)

Complete the following steps to work with this page:

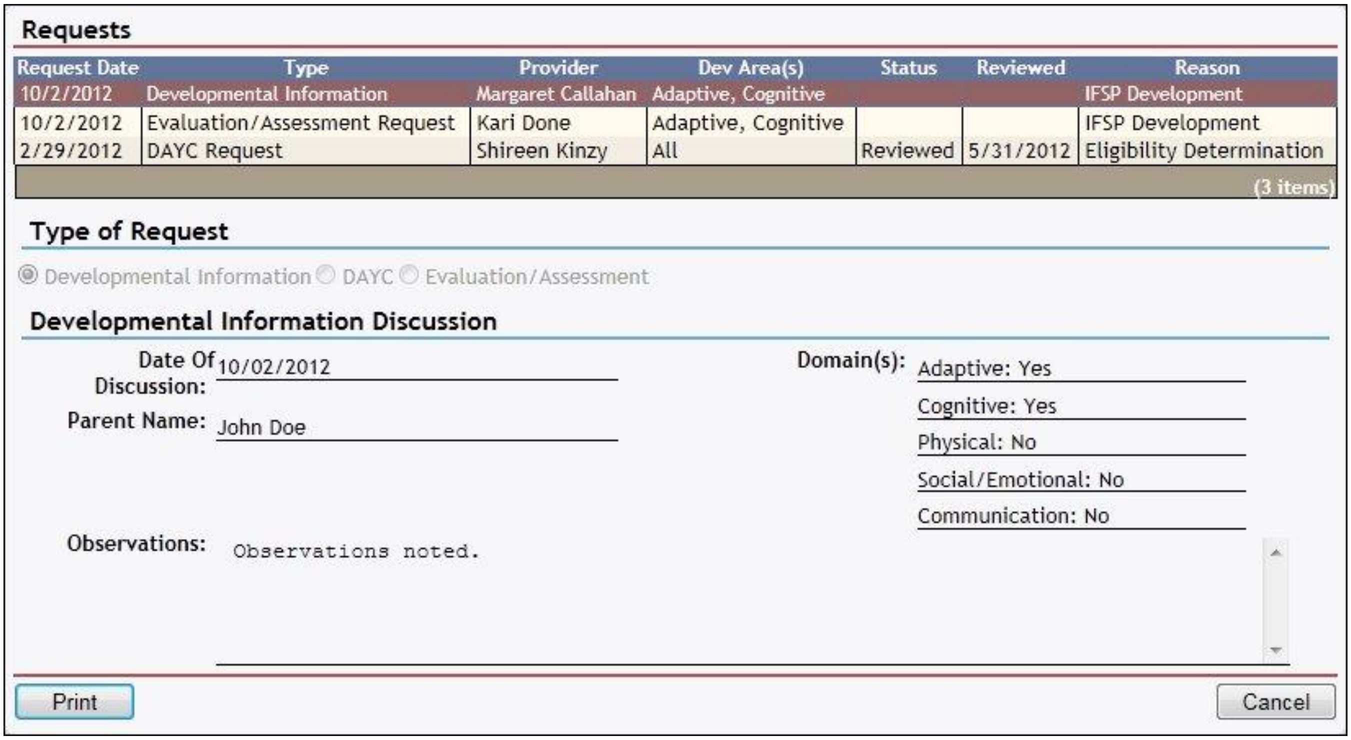
1. The **Requests** section displays a list of requests that currently exist for the child. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Request Date** displays the date on which the request was received.
   - **Type** displays the request type.
   - **Provider** displays the name of the service provider.
   - **Dev Area(s)** indicates which developmental functions are affected by or can be improved for this routine or activity.
   - **Status** displays the current status of the request.
   - **Reviewed** displays the date of the review.
   - **Reason** displays the reason for the request.
2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

NOTE: When a record is double-clicked in the table, the page displays differently depending on the type of request being viewed. Click the following links for information specific to each type of request:

- Developmental Information Discussion
- DAYC Request
- Evaluation/Assessment Request

Complete the following steps to work with a Developmental Information Discussion:

When a **Developmental Information Discussion** record is double-clicked in the table, the page allows you to view developmental discussion information.

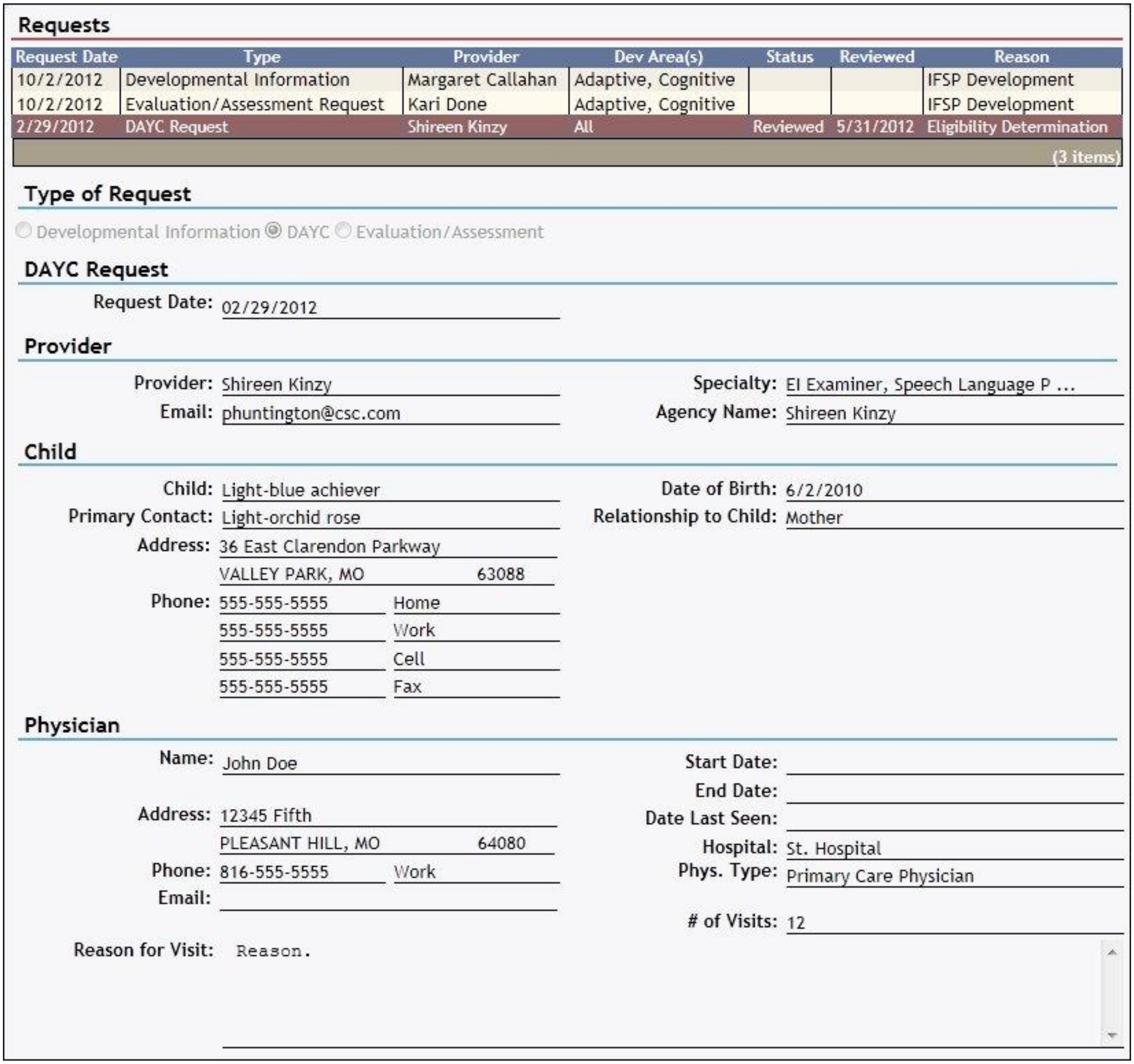


Evaluations and Assessments page (Development Information Discussion details top view)

1. In the **Type of Request** section, view the request type.
2. The **Development Information Discussion** section displays detailed information about the developmental discussion. View the following information in this section as necessary:
   - **Date of Discussion** displays the date on which the discussion occurred.
   - **Parent Name** displays the parent's first and last name.
   - **Domain(s)** indicates which domains are related to this developmental discussion.
   - **Observations** displays the observations that were noted during the developmental discussion.
3. Click the following command button(s) as necessary.
   - Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Complete the following steps to work with a DAYC Request:

When a **DAYC Request** record is double-clicked in the table, the page allows you to view developmental discussion information.



Requests

Request Date	Type	Provider	Dev Area(s)	Status	Reviewed	Reason
10/2/2012	Developmental Information	Margaret Callahan	Adaptive, Cognitive			IFSP Development
10/2/2012	Evaluation/Assessment Request	Kari Done	Adaptive, Cognitive			IFSP Development
2/29/2012	DAYC Request	Shireen Kinzy	All	Reviewed	5/31/2012	Eligibility Determination

(3 items)

Type of Request

Developmental Information ◉ DAYC Evaluation/Assessment

DAYC Request

Request Date: 02/29/2012

Provider

Provider: Shireen Kinzy
Specialty: EI Examiner, Speech Language P ...
Email: phuntington@csc.com
Agency Name: Shireen Kinzy

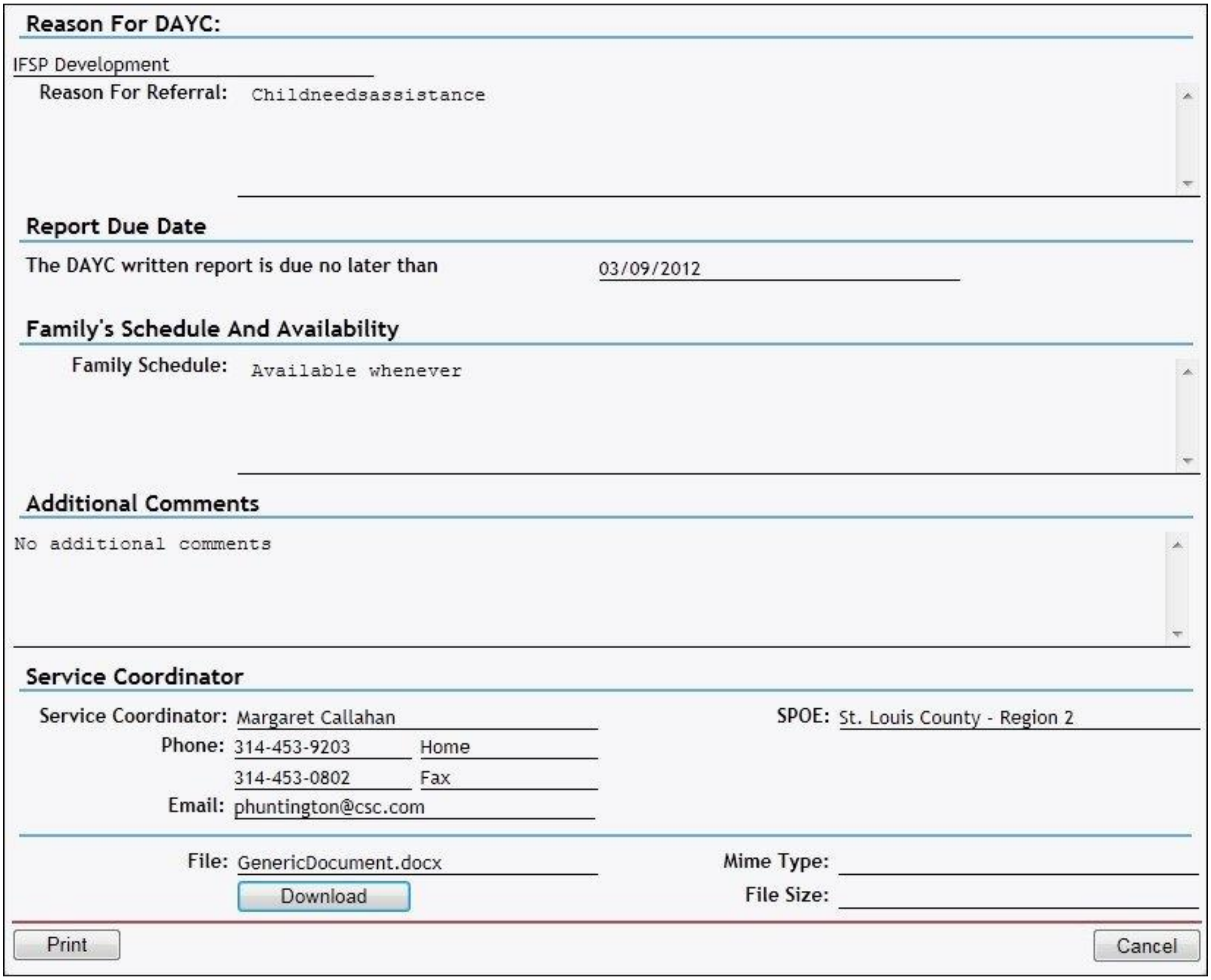
Child

Child: Light-blue achiever
Date of Birth: 6/2/2010
Primary Contact: Light-orchid rose
Relationship to Child: Mother
Address: 36 East Clarendon Parkway
VALLEY PARK, MO 63088
Phone: 555-555-5555 Home
555-555-5555 Work
555-555-5555 Cell
555-555-5555 Fax

Physician

Name: John Doe
Start Date:
End Date:
Address: 12345 Fifth
Date Last Seen:
PLEASANT HILL, MO 64080
Hospital: St. Hospital
Phone: 816-555-5555 Work
Phys. Type: Primary Care Physician
Email:
# of Visits: 12
Reason for Visit: Reason.

Evaluations and Assessments page (DAYC Request details top view)



Reason For DAYC:

IFSP Development

Reason For Referral: Childneedsassistance

Report Due Date

The DAYC written report is due no later than 03/09/2012

Family's Schedule And Availability

Family Schedule: Available whenever

Additional Comments

No additional comments

Service Coordinator

Service Coordinator: Margaret Callahan

SPOE: St. Louis County - Region 2

Phone: 314-453-9203 Home

314-453-0802 Fax

Email: phuntington@csc.com

File: GenericDocument.docx

Download

Mime Type:

File Size:

Print

Cancel

Evaluations and Assessments page (DAYC Request details bottom view)

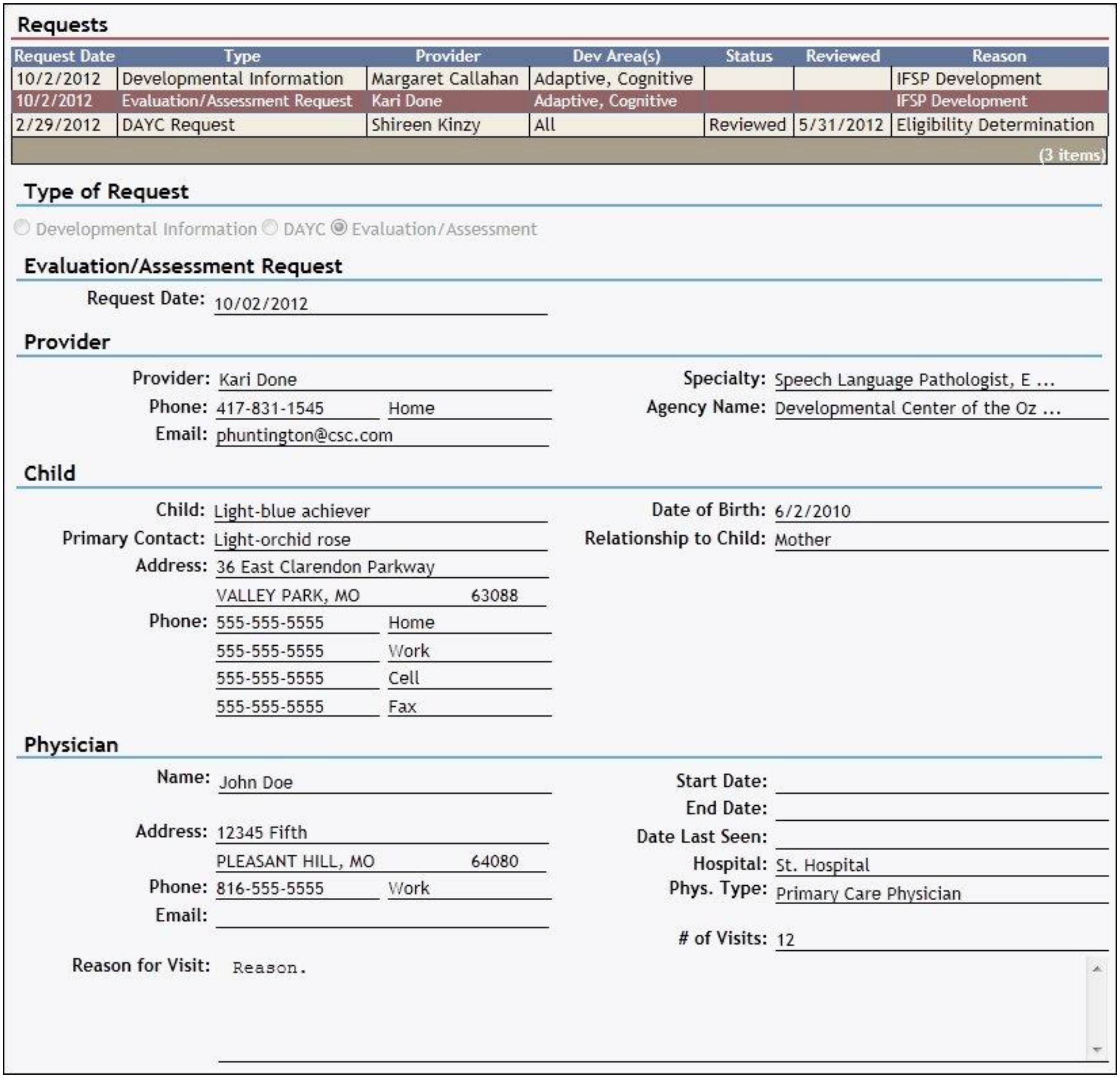
1. In the **Type of Request** section, view the request type.
2. The **DAYC Request** section displays the date on which the request was received. View the following information in this section as necessary:
   - **Request Date** displays the date on which the request was received.
3. The **Provider** section displays detailed information about the service provider. View the following information in this section as necessary:
   - **Provider** displays the name of the service provider.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Email** displays the individual's electronic mail address.
   - **Specialty** displays the individual's specialty.
   - **Agency Name** displays the name of the agency with which the person is associated (if applicable).
4. The **Child** section displays detailed information about the child. Information in this section is populated using the data recorded on the Child Detail page and is read-only. View the following information in this section as necessary:
   - **Child** displays the child's first and last name.
   - **Primary Contact** displays the first and last name of the primary contact person.

- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Relationship to Child** displays the primary contact's relationship to the child.

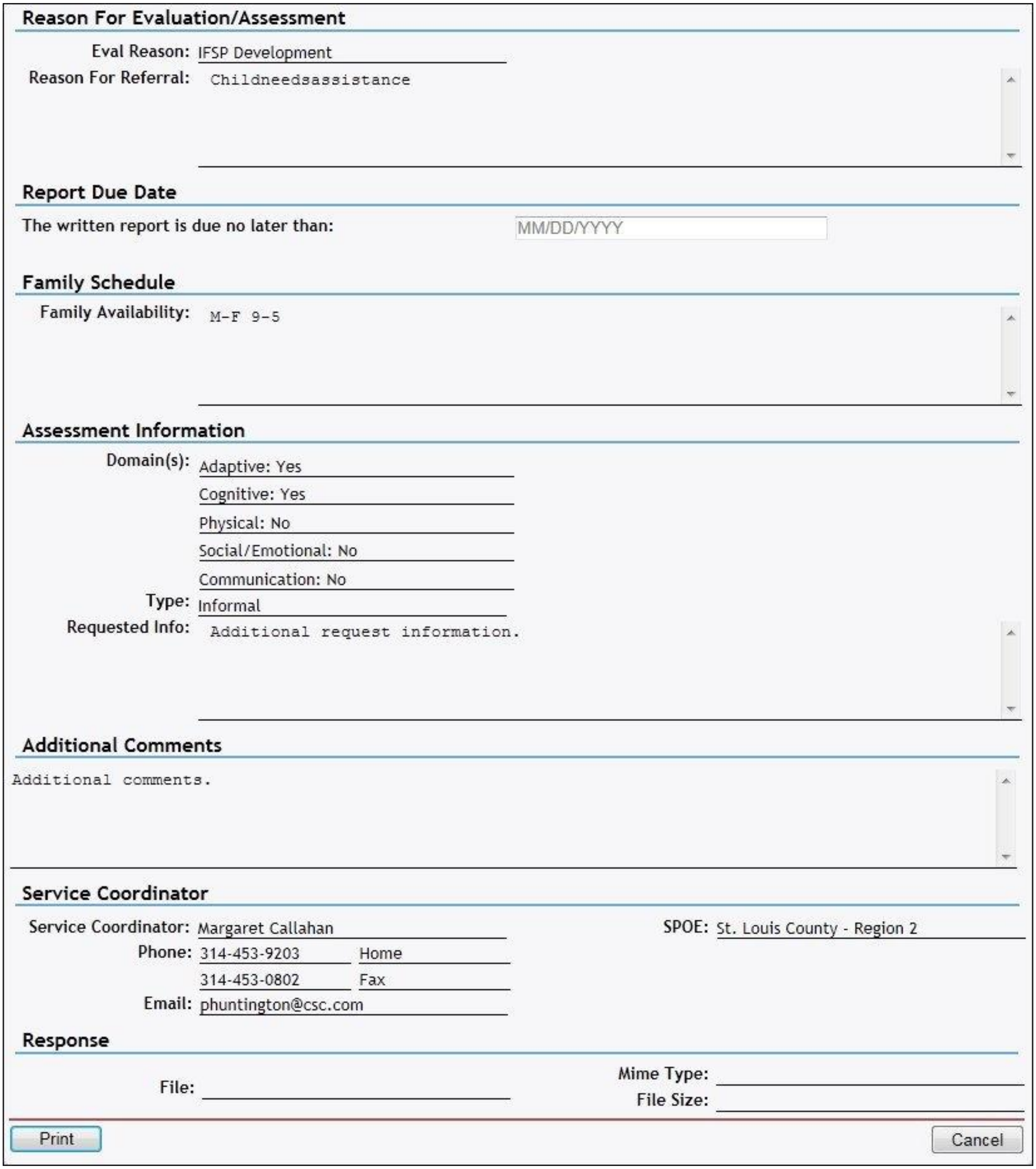
5. The **Physician** section displays detailed information about the child's physician. Information in this section is populated using the data recorded on the Physician page and is read-only. View the following information in this section as necessary:
   - **Name** displays the person's first and last name.
   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Email** displays the individual's electronic mail address.
   - **Reason for Visit** displays the purpose of the visit.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
   - **Date Last Seen** displays the date on which the person was last seen by the physician.
   - **Hospital** displays the name of the hospital with which the physician is affiliated.
   - **Phys. Type** displays the specific role assigned to the physician from the drop-down list.
   - **# of Visits** displays the number of times the person has been seen by the physician.
6. In the **Reason for DAYC** section, view the reason(s) for the request.
7. The **Family's Schedule and Availability** section displays detailed information about the family's schedule. View the following information in this section as necessary:
   - **Family Schedule** displays detailed information about the family's current schedule and availability.
8. In the **Additional Comments** section, view enter additional notes or details.
9. The **Service Coordinator** section displays detailed information about the service coordinator assigned to the child at the time of request. Information in this section is populated using the data recorded on the Service Coordination page and is read-only. View the following information in this section as necessary:
   - **Service Coordinator** displays the service coordinator's first and last name.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Email** displays the individual's electronic mail address.
   - **SPOE** displays the location in which the person practices.
   - **File** displays the name of the file and the three- or four-character file extension.
   - **Mime Type** displays the multi-purpose internet mail extension (MIME) type of the file currently attached to the record.
   - **File Size** displays the size of the file on disk.
   - Click the **Download** button to download the file currently to your local workstation. If a file has not been uploaded, the **Download** button is unavailable. For more information about downloading files, please see documentation specific to your current web browser and/or your operating system.
10. Click the following command button(s) as necessary.
    - Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Complete the following steps to work with an Evaluation/Assessment Request:

When an **Evaluation/Assessment Request** record is double-clicked in the table, the page allows you to view developmental discussion information.



Evaluations and Assessments page (Evaluation/Assessment Request details top view)



Reason For Evaluation/Assessment

Eval Reason: IFSP Development

Reason For Referral: Childneedsassistance

Report Due Date

The written report is due no later than: MM/DD/YYYY

Family Schedule

Family Availability: M-F 9-5

Assessment Information

Domain(s): Adaptive: Yes

Cognitive: Yes

Physical: No

Social/Emotional: No

Communication: No

Type: Informal

Requested Info: Additional request information.

Additional Comments

Additional comments.

Service Coordinator

Service Coordinator: Margaret Callahan

SPOE: St. Louis County - Region 2

Phone: 314-453-9203 Home

314-453-0802 Fax

Email: phuntington@csc.com

Response

File:

Mime Type:

File Size:

Print

Cancel

Evaluations and Assessments page (Evaluation/Assessment Request details bottom view)

1. In the **Type of Request** section, view the request type.
2. The **Evaluation/Assessment Request** section displays the date on which the request was received. View the following information in this section as necessary:
   - **Request Date** displays the date on which the request was received.

3. The **Provider** section displays detailed information about the service provider. View the following information in this section as necessary:
    - **Provider** displays the name of the service provider.
    - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
    - **Email** displays the individual's electronic mail address.
    - **Specialty** displays the individual's specialty.
    - **Agency Name** displays the name of the agency with which the person is associated (if applicable).
4. The **Child** section displays detailed information about the child. Information in this section is populated using the data recorded on the Child Detail page and is read-only. View the following information in this section as necessary:
    - **Child** displays the child's first and last name.
    - **Primary Contact** displays the first and last name of the primary contact person.
    - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
    - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
    - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
    - **Relationship to Child** displays the primary contact's relationship to the child.
5. The **Physician** section displays detailed information about the child's physician. Information in this section is populated using the data recorded on the Physician page and is read-only. View the following information in this section as necessary:
    - **Name** displays the person's first and last name.
    - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
    - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
    - **Email** displays the individual's electronic mail address.
    - **Reason for Visit** displays the purpose of the visit.
    - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
    - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
    - **Date Last Seen** displays the date on which the person was last seen by the physician.
    - **Hospital** displays the name of the hospital with which the physician is affiliated.
    - **Phys. Type** displays the specific role assigned to the physician from the drop-down list.
    - **# of Visits** displays the number of times the person has been seen by the physician.
6. In the **Reason for Evaluation/Assessment** section, view the reason(s) for the request.
7. In the **Report Due Date** section, view the date on which the report is due.
8. The **Family Schedule** section displays detailed information about the family's schedule. View the following information in this section as necessary:
    - **Family Availability** displays detailed information about the family's current schedule and availability.
9. The **Assessment Information** section displays detailed information about the assessment. View the following information in this section as necessary:
    - **Domain(s)** indicates which domains are related to this developmental discussion.
    - **Type** indicates whether the evaluation or assessment is **Formal** or **Informal**.
    - **Requested Info** displays any notes or details about additional information that is requested.
10. In the **Additional Comments** section, view enter additional notes or details.
11. The **Service Coordinator** section displays detailed information about the service coordinator assigned to the child at the time of request. Information in this section is populated using the data recorded on the Service Coordination page and is read-only. View the following information in this section as necessary:
    - **Service Coordinator** displays the service coordinator's first and last name.

- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Email** displays the individual's electronic mail address.
- **SPOE** displays the location in which the person practices.
- **File** displays the name of the file and the three- or four-character file extension.
- **Mime Type** displays the multi-purpose internet mail extension (MIME) type of the file currently attached to the record.
- **File Size** displays the size of the file on disk.
- Click the **Download** button to download the file currently to your local workstation. If a file has not been uploaded, the **Download** button is unavailable. For more information about downloading files, please see documentation specific to your current web browser and/or your operating system.

12. Click the following command button(s) as necessary.
    - Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Eligibility

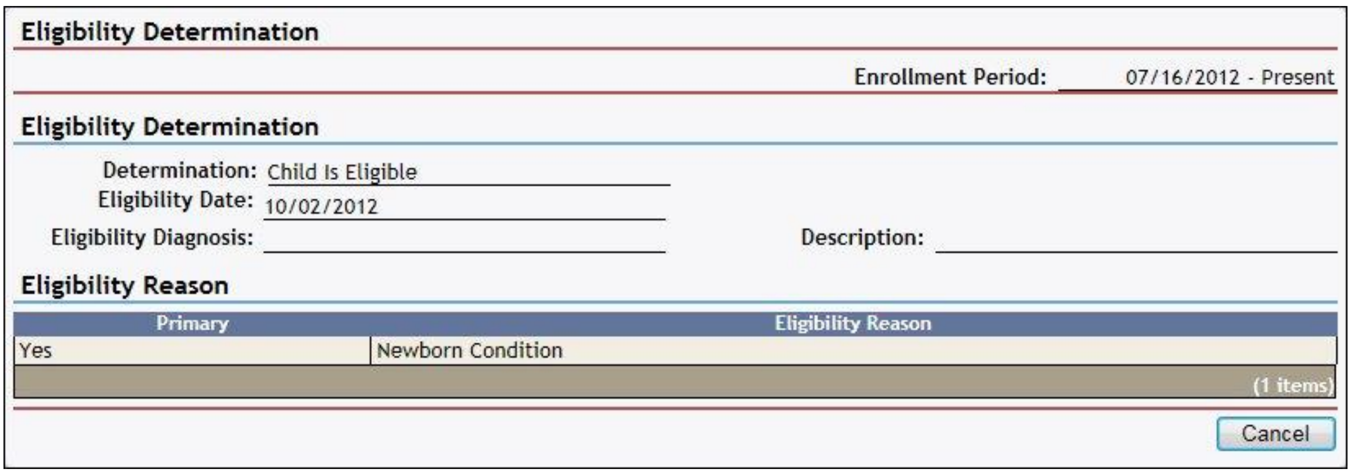
Eligibility

This page allows you to work with eligibility data for a child. Depending on the method of access, your current permissions, and the child's current status, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **Eligibility** menu option.



Eligibility Determination

Enrollment Period: 07/16/2012 - Present

Eligibility Determination

Determination: Child Is Eligible

Eligibility Date: 10/02/2012

Eligibility Diagnosis:

Description:

Eligibility Reason

Primary	Eligibility Reason
Yes	Newborn Condition

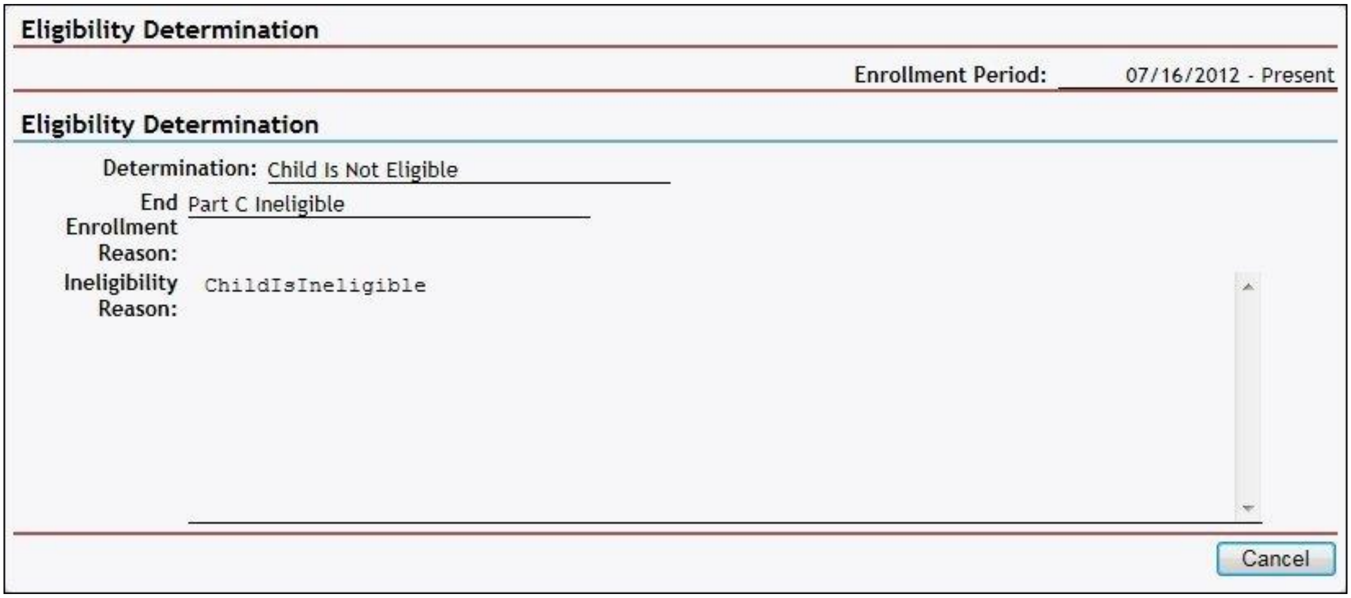
(1 items)

Cancel

Eligibility page (Eligibility Determination default view for eligible child)

NOTE: When the page initially displays:

- If the child is eligible, the page displays in eligible view (pictured above).
- If the child is ineligible, the page displays in ineligible view (pictured below).



Eligibility page (Eligibility Determination default view for ineligible child)

Complete the following steps to work with this page:

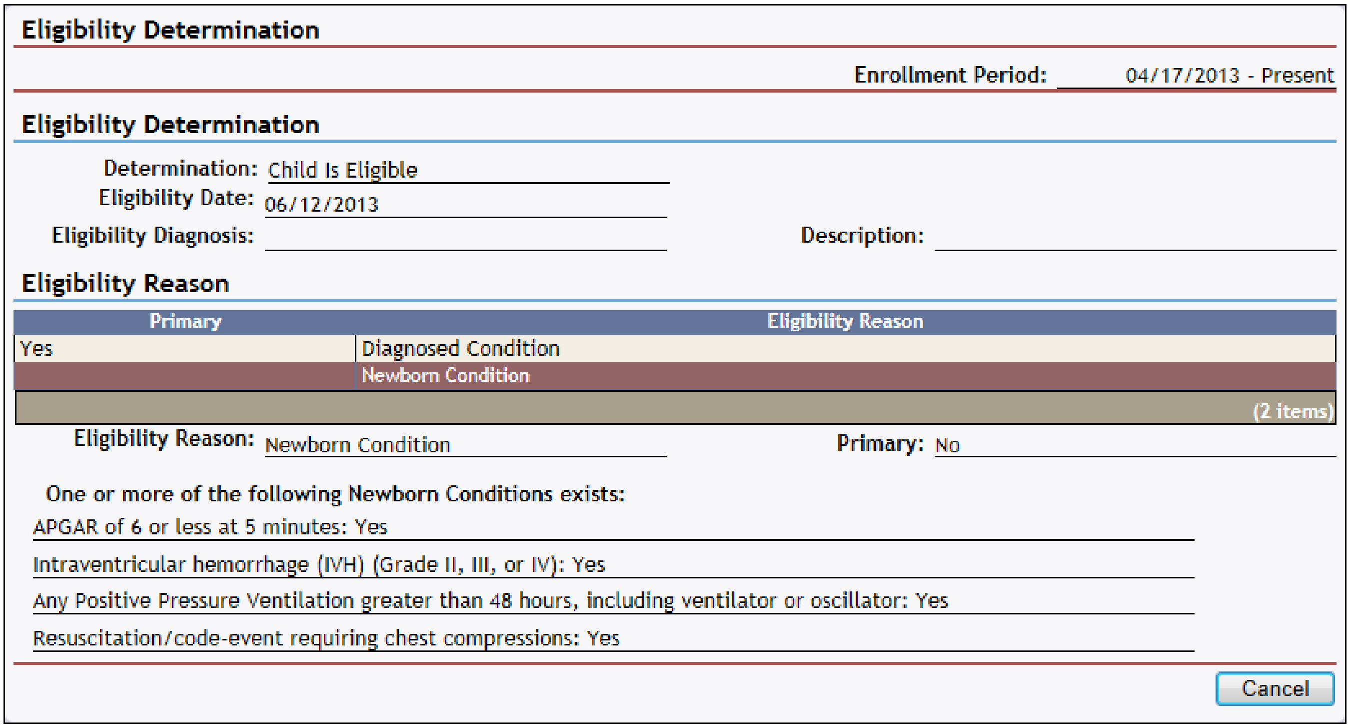
1. The **Eligibility Determination** section displays detailed eligibility (or ineligibility) information for the child. View the following information in this section as necessary:
   - **Determination** indicates whether the child is currently eligible for participation.
   - **Eligibility Date** displays the child's eligibility determination date.
   - **Eligibility Diagnosis** displays the child's ICD9 eligibility diagnosis code.
   - **Description** displays additional descriptive information.
   - **End Enrollment Reason** displays the reason the person's enrollment ended.
   - **Ineligibility Reason** displays the reasons why the child was deemed ineligible.

> **NOTE:** If the child is eligible, **Eligibility Date**, **Eligibility Diagnosis**, and **Description** are displayed. If the child is ineligible, **End Enrollment Reason** and **Ineligibility Reason** are displayed.
>
> The current **Enrollment Period** displays in the top right of the section heading.

2. The **Eligibility Reason** section displays a list of eligibility reasons that currently exist for the child in a table. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Primary** indicates whether this is the primary diagnosis or determination.
   - **Eligibility Reason** displays the reason for the person's eligibility determination.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Eligibility page (Eligibility Reason details view)

4. The **Eligibility Reason** section displays detailed information about the eligibility reason. View the following information in this section as necessary:
   - In **Eligibility Reason**, view the eligibility reason for the person's eligibility determination.
   - **Primary** indicates whether this is the primary diagnosis or determination.

> **NOTE:** Depending on the type of eligibility reason selected, the page displays differently for each type of eligibility reason.

If the **Eligibility Reason** is "Newborn Condition", view the following information as necessary:

- **Condition Diagnosis** displays the name of the condition and **Description** of the diagnosis, and is not displayed when adding an eligibility reason.
- **One or more of the following Newborn Conditions exists** indicates that the child has (or had) newborn conditions exist.

If the **Eligibility Reason** is "Diagnosed Condition", view the following information as necessary:

- In **Condition**, view the diagnosed condition.

If the **Eligibility Reason** is "Other Condition", view the following information as necessary:

- **Condition Diagnosis** displays the name of the condition and **Description** of the diagnosis, and is not displayed when adding an eligibility reason.
- **Related Domains** indicates the domain(s) to which the issue is related.
- In **Statement of Impact**, view additional information specific to the domain(s).

If the **Eligibility Reason** is "Developmental Delay", view the following information as necessary:

- In **Related Domain**, view the domain to which the diagnosis is related.
- View any additional notes or explanations in the available comments field.

5. Click the following command button(s) in the **Eligibility Reason** section as necessary.

- Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Eligibility Sources

Name	Role	Input Method
John Doe	Physician or Authorized Designee	By Interview
Jane Doe	Service Coordinator	By Meeting
		(2 items)

Eligibility page (Eligibility Sources default view)

6. The **Eligibility Sources** section displays a list of eligibility sources that currently exist for the child in a table. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Name** displays the person's first and last name.
   - **Role** displays the role currently assigned to the person.
   - **Input Method** displays the method in which the source was input.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

7. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
8. The **Eligibility Sources** section displays detailed information about the eligibility source. View the following information in this section as necessary:
   - In **Name**, view the first and last name of the person or agency.
   - In **Role**, view the specific role assigned to the person.
   - In **Input Method**, view the specific method in which the source was input.
9. Click the following command button(s) in the **Eligibility Sources** section as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

IFSP Meetings

IFSP Meetings

This page allows you to work with IFSP meetings for a child. Depending on the method of access, your current permissions, the child's status, the meeting's type, and the meeting's status, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option.

Complete the following steps to work with this page:

1. The **IFSP Meetings** section displays a list of IFSP meetings for the child.

IFSP Meetings

Meeting Type	IFSP Period	Meeting Date	Meeting Status
Inter-Periodic	03/23/2012 - 03/22/2013	10/10/2012	Ongoing
Initial	03/23/2012 - 03/22/2013	3/23/2012	Finalized
			(2 items)

IFSP Meetings page (default view)

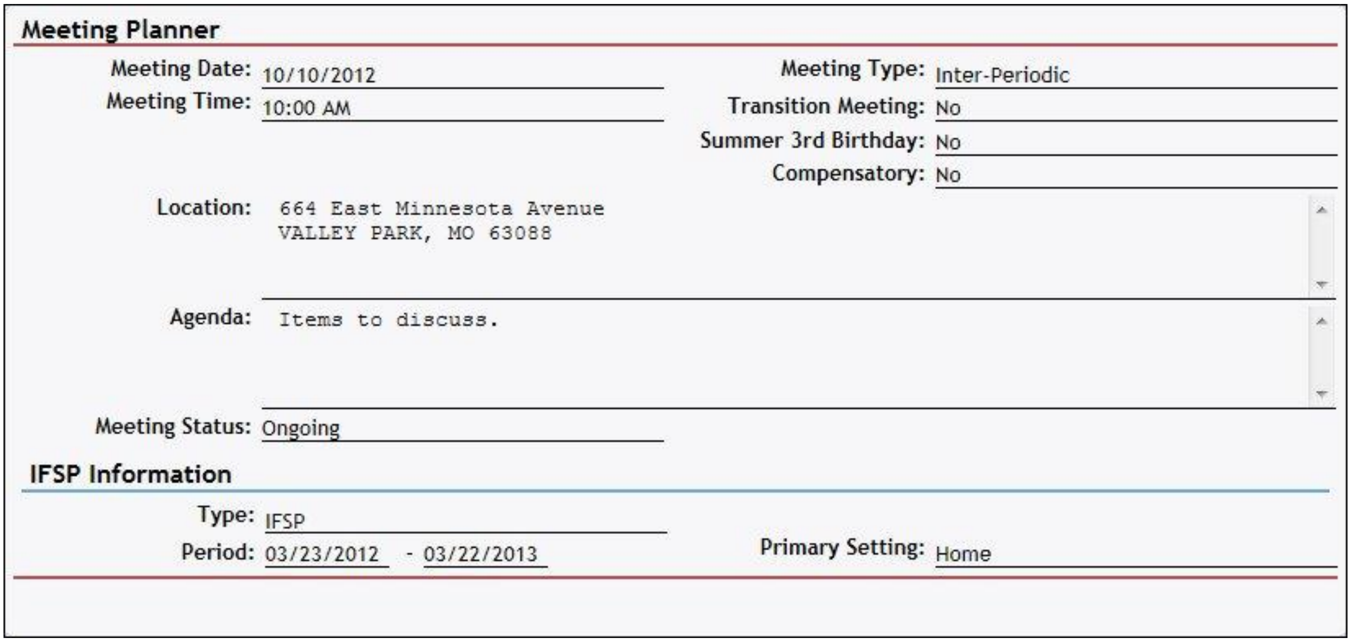
View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Meeting Type** displays the type of activity.
- **IFSP Period** displays the beginning and ending dates of the IFSP period.
- **Meeting Date** displays the date of the activity.
- **Meeting Status** displays the current status of the activity.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

NOTE: When a record is double-clicked the table, a selection bar is available. For more information about the selection bar, see IFSP Meetings selection bar.

3. The **Meeting Planner** section displays detailed information about the family member.



IFSP Meetings page (Meeting Planner section)

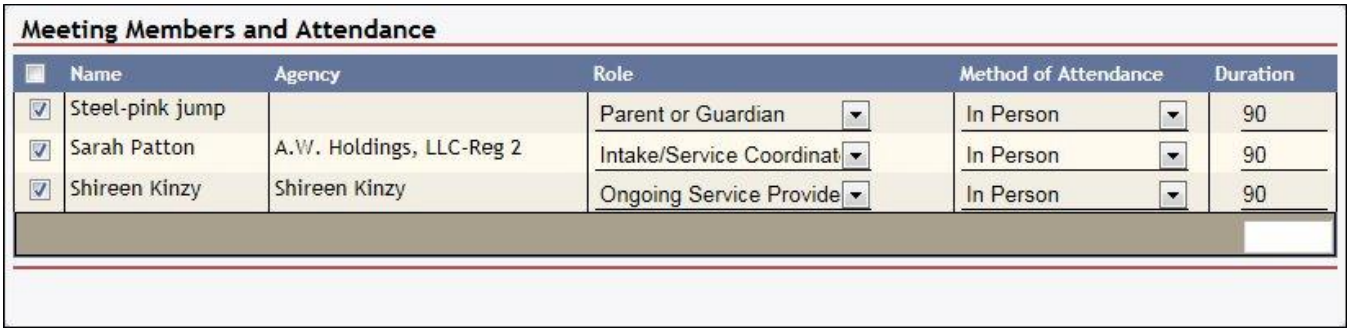
View the following information in this section as necessary:

- In **Meeting Date**, view the date on which the meeting is (or was) scheduled.
- In **Meeting Time**, view the time at which the meeting is (or was) scheduled in hh:mm AM/PM format.
- In **Meeting Type**, view the meeting type.
- **Transition Meeting** indicates whether the meeting is a transition meeting for a child over the age of 2 years and 6 months.
- **Summer 3rd Birthday** indicates whether the child's date of birth is between 04/01 and 08/15.

  This is not available for meetings in "Tentative" or "Scheduled" status.
- **Compensatory** indicates whether the meeting is a compensatory meeting.

  This is not available for meetings in "Tentative" or "Scheduled" status.
- In **Location**, view the mailing address of the primary contact for the meeting.
- In **Agenda**, view the meeting agenda.
- **Meeting Status** displays the current status of the activity.

4. The **IFSP Information** section displays detailed information about the IFSP. View the following information in this section as necessary:
   - **Type** displays the IFSP type.
   - **Period** displays the applicable date range.
   - **Primary Setting** displays the primary IFSP setting.
   - **Part B Eligibility Confirmed** indicates whether eligibility has been confirmed if the IFSP type is Part B, if applicable.
5. The **Meeting Members and Attendance** section displays detailed information about the family member.



Meeting Members and Attendance

	Name	Agency	Role	Method of Attendance	Duration
☑	Steel-pink jump		Parent or Guardian	In Person	90
☑	Sarah Patton	A.W. Holdings, LLC-Reg 2	Intake/Service Coordinat	In Person	90
☑	Shireen Kinzy	Shireen Kinzy	Ongoing Service Provide	In Person	90

IFSP Meetings page (Meeting Members and Attendance section)

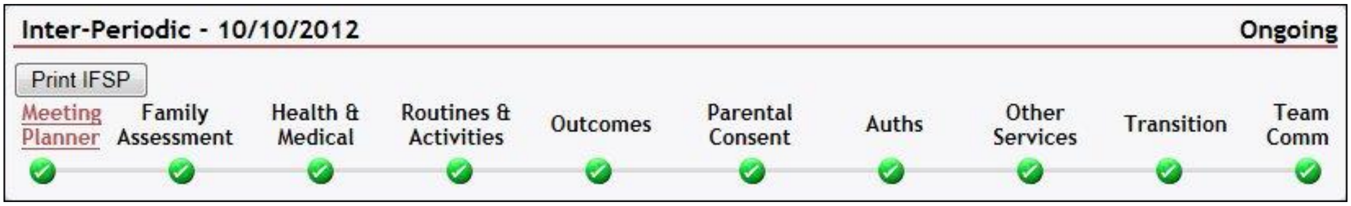
View the following information in this table as necessary:

- The first column indicates whether the team member has been invited to the meeting.
- **Name** displays the person's first and last name.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **Role**, view the specific role assigned to the person.
- In **Method of Attendance**, view the method in which the person will participate (or participated) in the meeting.
- In **Duration**, view the amount of time that the person attended the meeting in 15 minute increments.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

IFSP Meetings selection bar

This selection bar is available on the IFSP Meetings page and allows you to work with IFSP meetings for a child. Depending on the method of access, your current permissions, the child's status, the meeting's type, and the meeting's status, this selection bar displays differently and some information may be disabled or unavailable.



IFSP Meetings selection bar

Complete the following steps to work with this selection bar:

1. View the following information on the selection bar:
   - The meeting's type is displayed at the top left of the selection bar.
   - The date on which the meeting is (or was) scheduled displays to the right of the meeting's type at the top left of the selection bar.
   - The meeting's current status is displayed at the top right of the selection bar.
2. Click the following links on the selection bar as necessary:
   - Click the **Meeting Planner** link to display the Meeting Planner page.
   - Click the **Family Assessment** link to display the Family Assessment page.
   - Click the **Health & Medical** link to display the General Health page.
   - Click the **Routines & Activities** link to display the Routines and Activities page.
   - Click the **Outcomes** link to display the Outcomes page.
   - Click the **Parental Consent** link to display the Parental Consent page.
   - Click the **Auths** link to display the Authorizations page.
   - Click the **Other Services** link to display the Other Services page.
   - Click the **Transition** link to display the Transition page.
   - Click the **Team Comm** link to display the Team Communication page.

4. Click the **Print Signature Page** button to generate a Signature page report. The Report Viewer page displays in a new browser window when clicked.

   The **Print Signature Page** button is available only for meetings in Scheduled status.

5. Click the **Print IFSP** button to generate an Individualized Family Service Plan report. The Report Viewer page displays in a new browser window when clicked.

   The **Print IFSP** button is available only for meetings in Ongoing or Finalized status.

Family Assessment

Use this page to view the family assessment details for a child's IFSP meeting. Depending on the method of access, your current permissions, the child's status, the meeting's type, and the meeting's status, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Family Assessment** link on the selection bar.

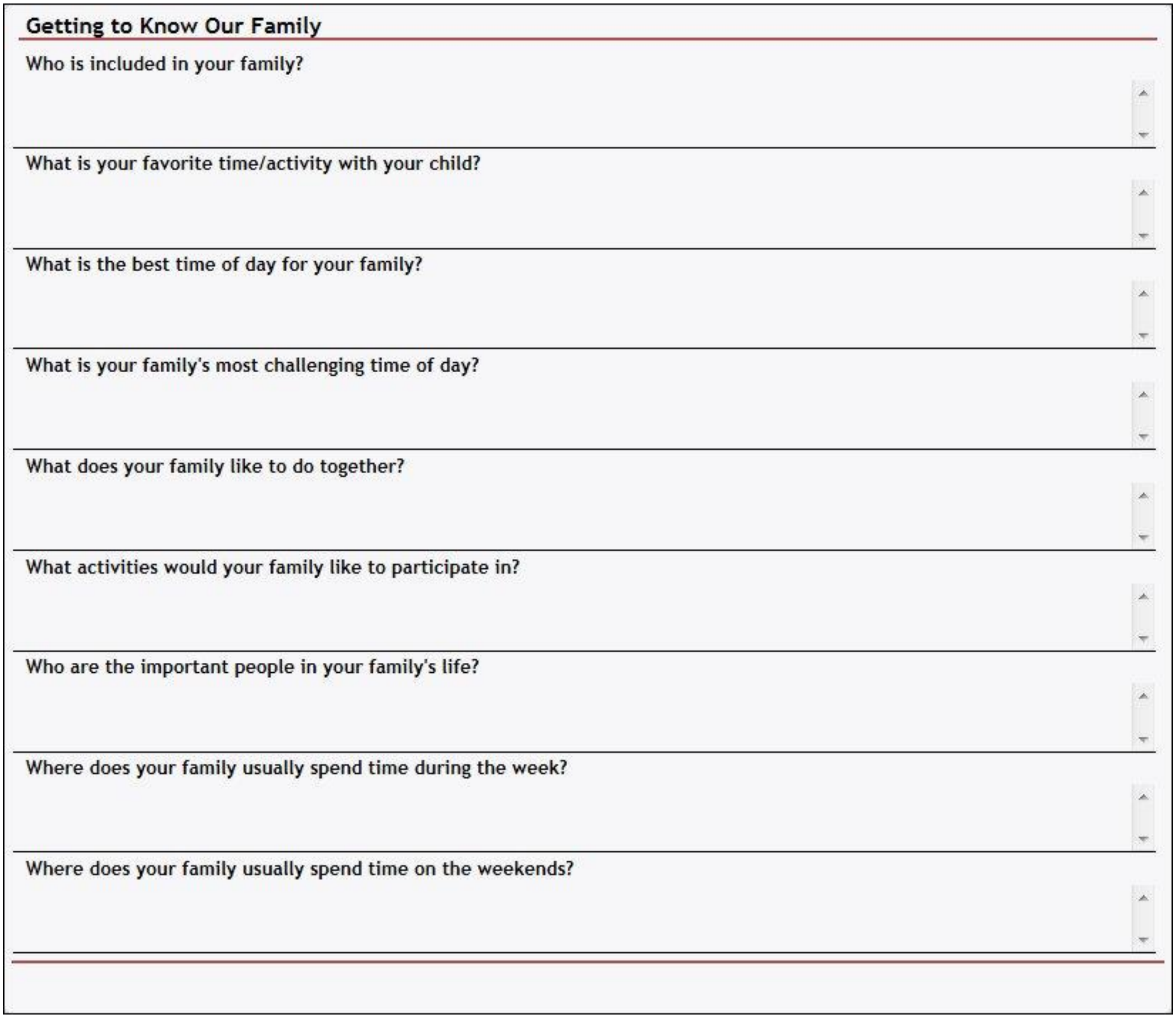
On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Family Assessment** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Getting to Know Our Family** section displays detailed information about the family.



Getting to Know Our Family

Who is included in your family?

What is your favorite time/activity with your child?

What is the best time of day for your family?

What is your family's most challenging time of day?

What does your family like to do together?

What activities would your family like to participate in?

Who are the important people in your family's life?

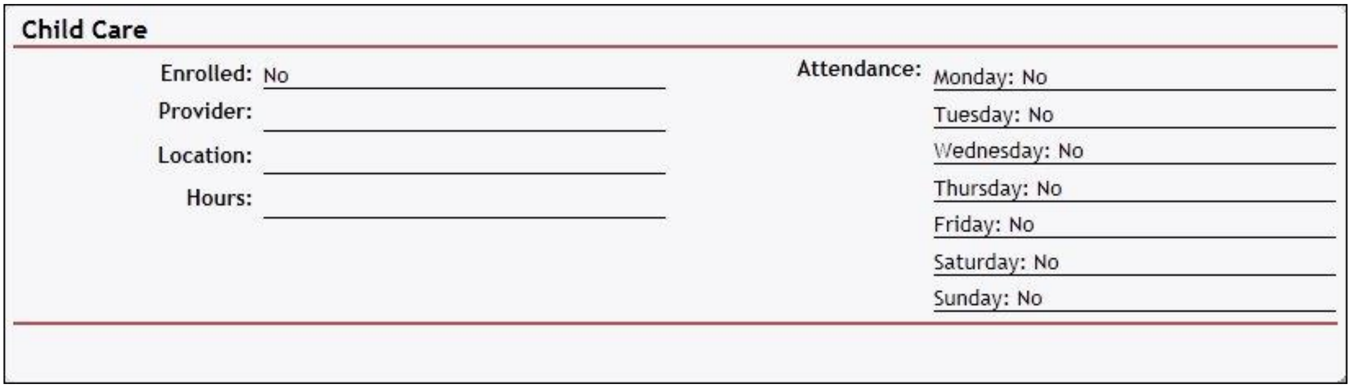
Where does your family usually spend time during the week?

Where does your family usually spend time on the weekends?

Getting to Know Our Family page (details view)

View the information in this section as necessary. The controls available in this section vary based on the child's status and the meeting's status.

2. The **Child Care** section displays care information for the child.

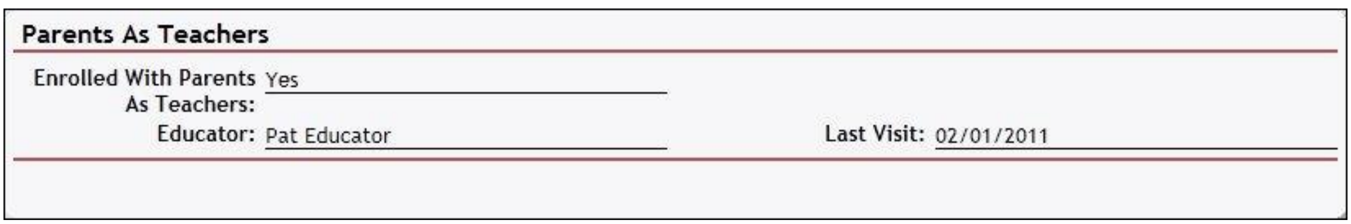


Child Care page (details view)

View the following information in this section as necessary:

- **Enrolled** indicates whether the person is currently is Enrolled.
- **Provider** displays the name of the service provider.
- **Location** displays the name of the SPOE location.
- **Hours** displays the location's business hours.
- **Attendance** indicates the days of the week in which the child is in child care.

3. The **Parents As Teachers** section displays information about parents who also act as teachers for the child.

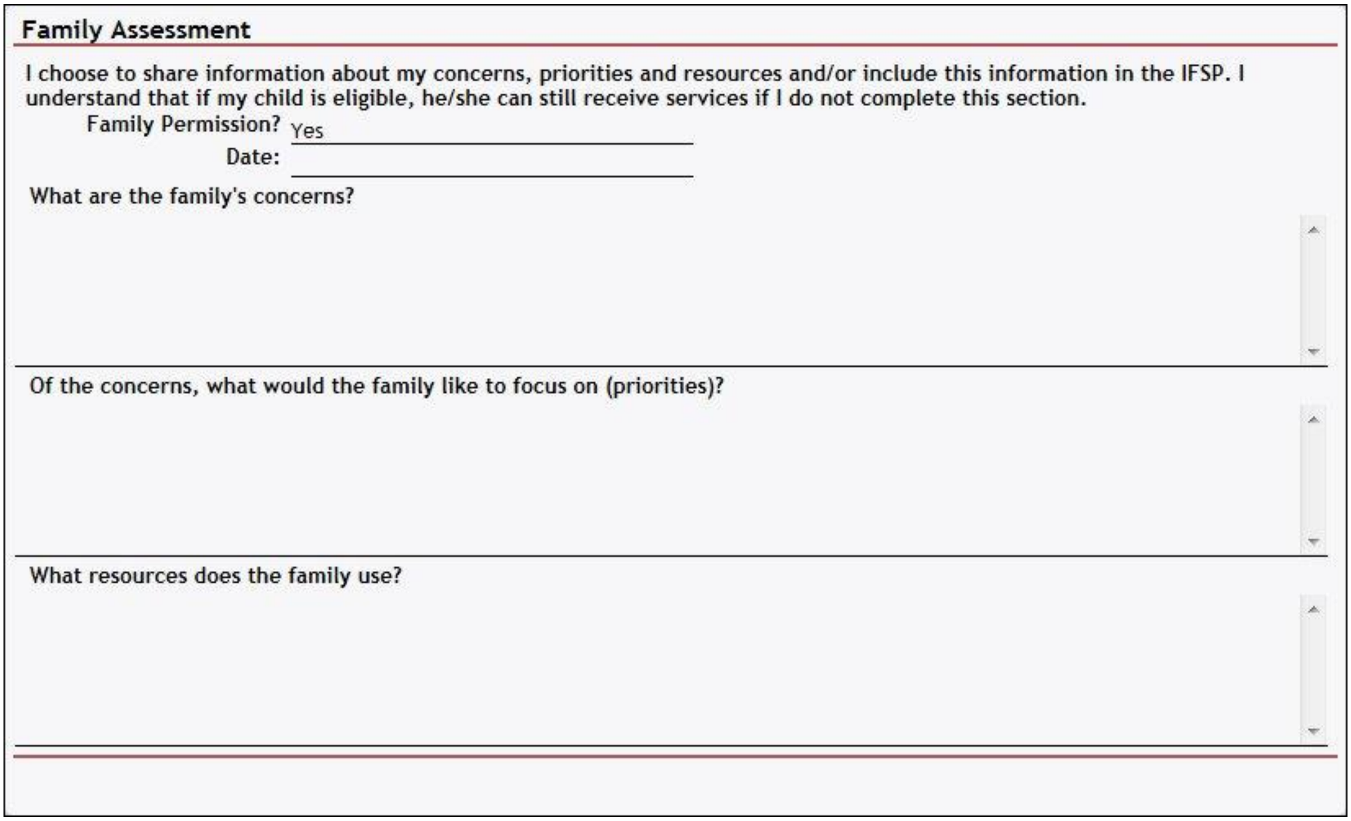


Parents As Teachers page (details view)

View the following information in this section as necessary:

- **Enrolled With Parents As Teachers** indicates whether the person was Enrolled in the program with a parent as a teacher or educator.
- **Educator** displays the first and last name of the teacher.
- **Last Visit** displays the date of the last visit.

4. The **Family Assessment** section displays information about concerns, priorities, and resources shared with the IFSP team.



Family Assessment

I choose to share information about my concerns, priorities and resources and/or include this information in the IFSP. I understand that if my child is eligible, he/she can still receive services if I do not complete this section.

Family Permission? Yes

Date:

What are the family's concerns?

Of the concerns, what would the family like to focus on (priorities)?

What resources does the family use?

Family Assessment page (details view)

View the following information in this section as necessary:

- **Family Permission** indicates whether the person has elected to share information about concerns, priorities, and resources with the IFSP team.
- In **Date**, enter the date of the activity. For more information about entering dates, see the Calendar Controls topic.
- In **What are the family's concerns**, view the family's concerns, if applicable.
- In **Of the concerns, what would the family like to focus on (priorities)**, view the family's priorities, if applicable.
- In **What resources does the family uses**, view the resources used by the family, if applicable.

Health & Medical

Use this page to view the health and medical details for a child's IFSP meeting. Depending on the method of access, your current permissions, the child's status, the meeting's type, and the meeting's status, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Health & Medical** link on the selection bar.

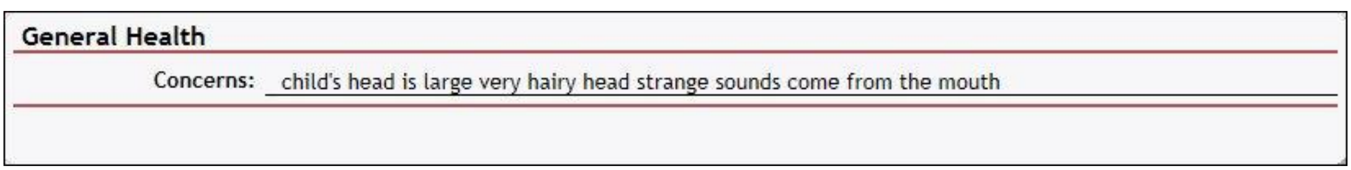
On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Health & Medical** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **General Health** section displays general health concerns for the child.

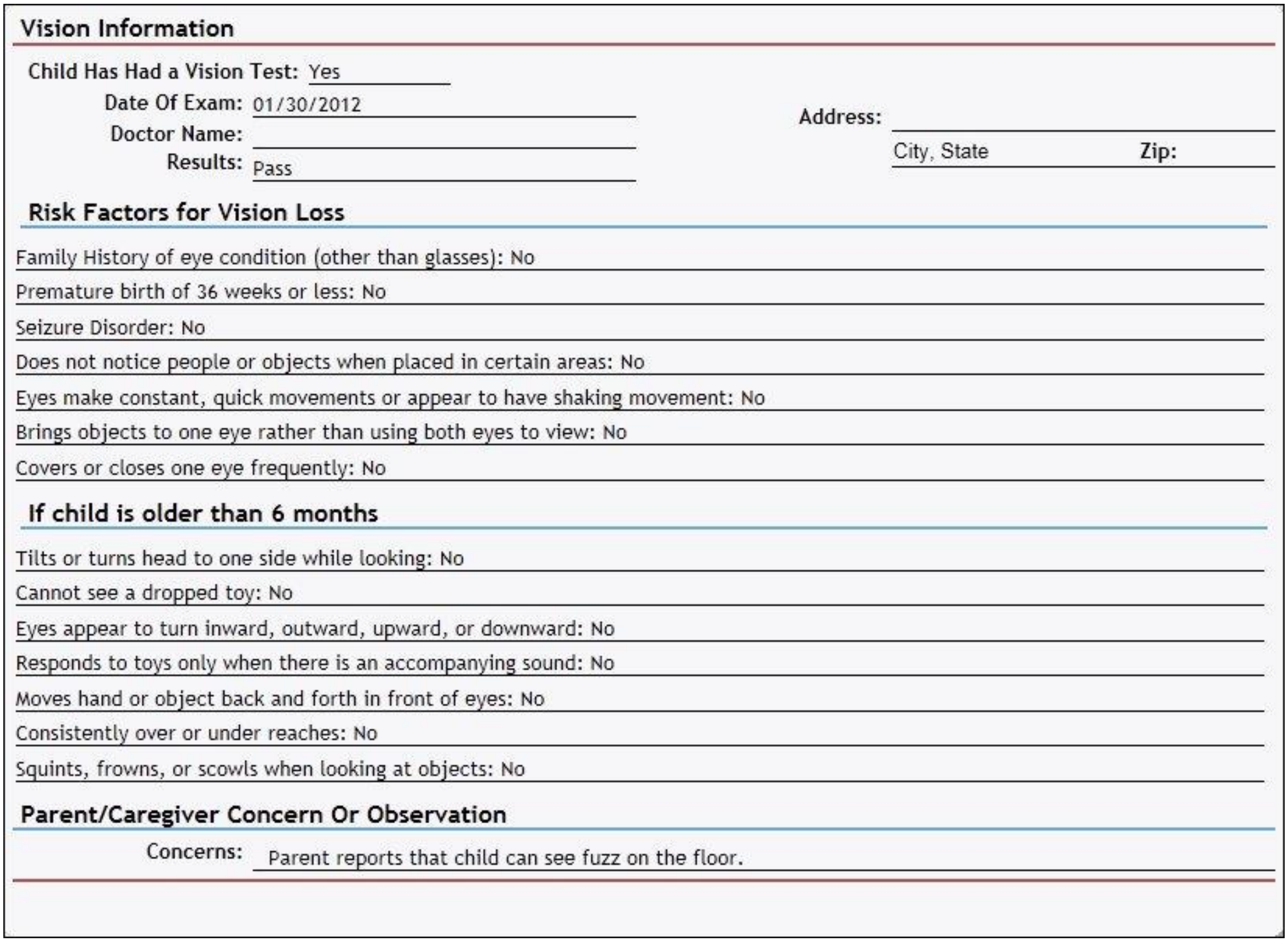


General Health page (details view)

View the following information in this section as necessary:

- **Concerns** displays any comments or concerns regarding the child's general health.

2. The **Vision Information** section displays vision screening information for the child.


Vision Information

Child Has Had a Vision Test: Yes
Date Of Exam: 01/30/2012
Doctor Name:
Results: Pass
Address:
City, State Zip:

Risk Factors for Vision Loss

Family History of eye condition (other than glasses): No
Premature birth of 36 weeks or less: No
Seizure Disorder: No
Does not notice people or objects when placed in certain areas: No
Eyes make constant, quick movements or appear to have shaking movement: No
Brings objects to one eye rather than using both eyes to view: No
Covers or closes one eye frequently: No

If child is older than 6 months

Tilts or turns head to one side while looking: No
Cannot see a dropped toy: No
Eyes appear to turn inward, outward, upward, or downward: No
Responds to toys only when there is an accompanying sound: No
Moves hand or object back and forth in front of eyes: No
Consistently over or under reaches: No
Squints, frowns, or scowls when looking at objects: No

Parent/Caregiver Concern Or Observation

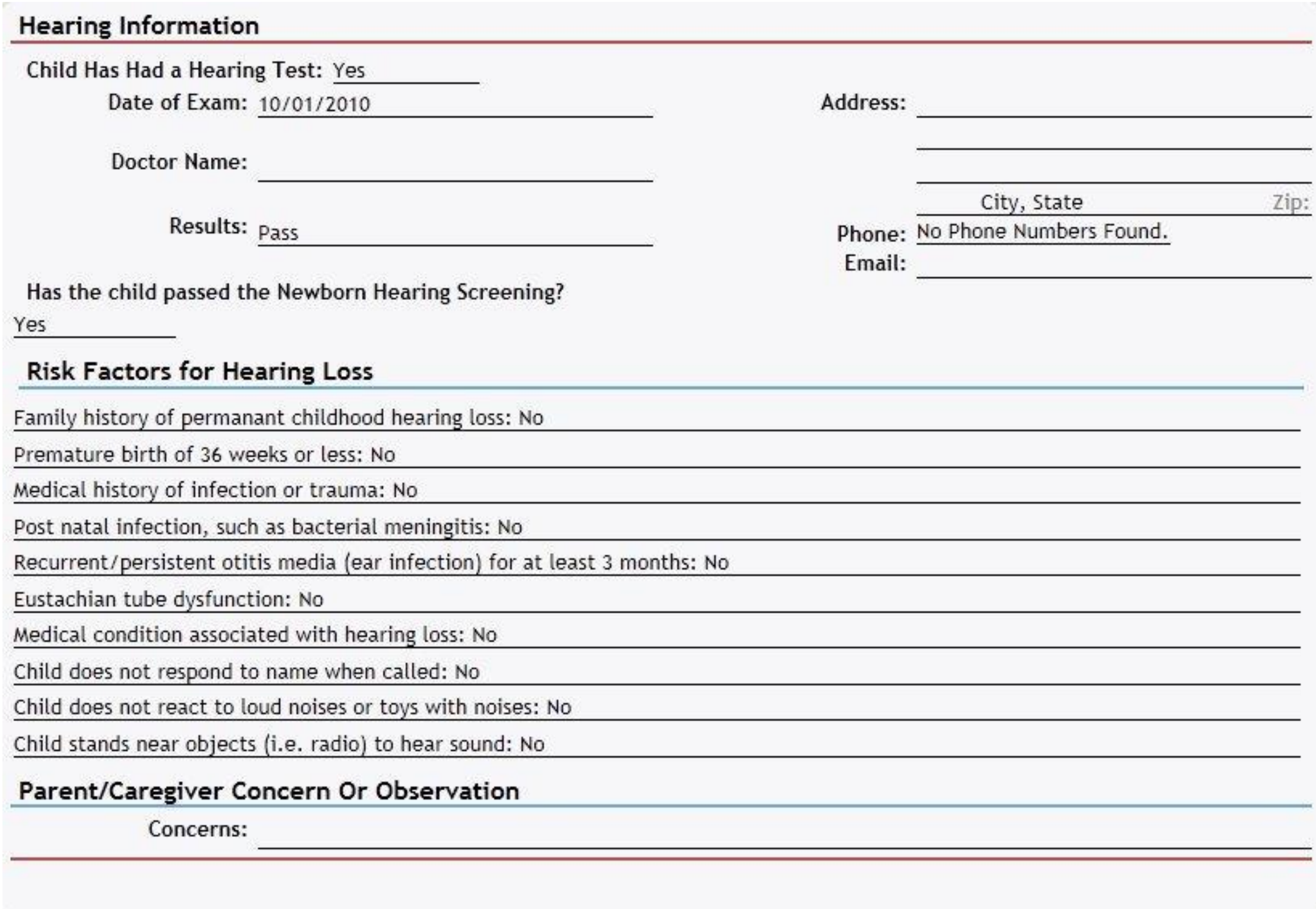
Concerns: Parent reports that child can see fuzz on the floor.

Vision Information page (details view)

View the following information in this section as necessary:

- **Child Has Had a Vision Test** indicates whether the child had a vision test administered.
- **Date of Exam** displays the date on which the test was administered.
- **Doctor Name** displays the first and last name of the examining physician.
- **Results** displays the results of the test that was administered.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Risk Factors for Vision Loss** indicates which risk factors may contribute to the person's loss of vision.
- **If child is older than 6 months** indicates which risk factors may contribute to the person's loss of vision for individuals over 6 months of age.
- **Parent/Caregiver Concern or Observation** displays any additional comments or concerns from the parent/caregiver regarding the child.

3. The **Hearing Information** section displays hearing screening information for the child.



Hearing Information page (details view)

View the following information in this section as necessary:

- **Child Has Had a Hearing Test** indicates whether the child had a hearing test administered.
- **Date of Exam** displays the date on which the test was administered.
- **Doctor Name** displays the first and last name of the examining physician.
- **Results** displays the results of the test that was administered.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Email** displays the individual's electronic mail address.
- **Has the child passed the Newborn Hearing Screening** indicates whether the child passed the hearing screening test as a newborn.
- **Risk Factors for Hearing Loss** indicates which risk factors that may contribute to the person's loss of hearing.
- **Parent/Caregiver Concern or Observation** displays any additional comments or concerns from the parent/caregiver regarding the child.

Routines and Activities

Use this page to view the daily routines and activities recorded for a child's IFSP meeting. Depending on the method of access, your current permissions, the child's status, the meeting's type, and the meeting's status, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Routines & Activities** link on the selection bar.

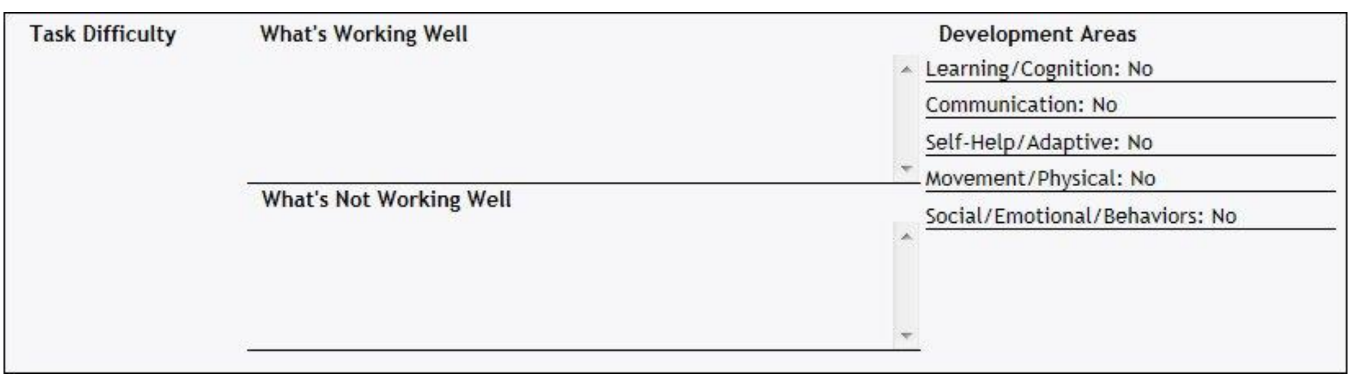
On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Routines & Activities** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Daily Routines and Activities** section displays various routine and activity sections for the child.



Routines and Activities page (details view)

2. The **Wake-up** section contains information on how the child responds to the daily wake-up routine.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.

- In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
- In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

3. The **Dressing/Toileting** section contains information on how the child responds to the daily dressing and toilet-training routine.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.
   - In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
   - In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

4. The **Mealtime** section contains information on how the child responds to daily mealtime routines.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.
   - In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
   - In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

5. The **Outings** section contains information on how the child responds to trips outside the home.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.
   - In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
   - In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

6. The **Play** section contains information on how the child responds to the playtime activities.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.
   - In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
   - In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

7. The **Bathtime** section contains information on how the child responds to the bathing routine.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.
   - In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
   - In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

8. The **Bedtime/Naps** section contains information on how the child responds to the daily bedtime and nap routine.

   View the following information in this section as necessary:

   - In **Task Difficulty**, view how well the person handles the routine or activity.
   - In **What's Working Well**, view positive details about how the person handles the routine or activity.
   - In **What's Not Working Well**, view areas for improvement or negative details about how the person handles the routine or activity.
   - In **Development Areas**, view which developmental functions are affected by or can be improved for this routine or activity.

Outcomes

Use this page to view outcomes recorded for a child's IFSP meeting. Depending on the method of access, your current permissions, the child's status, the meeting's type, and the meeting's status, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Outcomes** link on the selection bar.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Outcomes** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Outcomes** section displays a list of outcomes for the IFSP meeting.

Show: Active | Inactive | All

Outcome #	Outcome Statement	Start Date	End Date	Status	Type
1	do stuff	3/23/2012		Active	Child
2	do stuff	3/23/2012		Active	Child

(2 items)

Outcomes page (default view)

Click the following links below the section heading to filter the list of records displayed in the table:

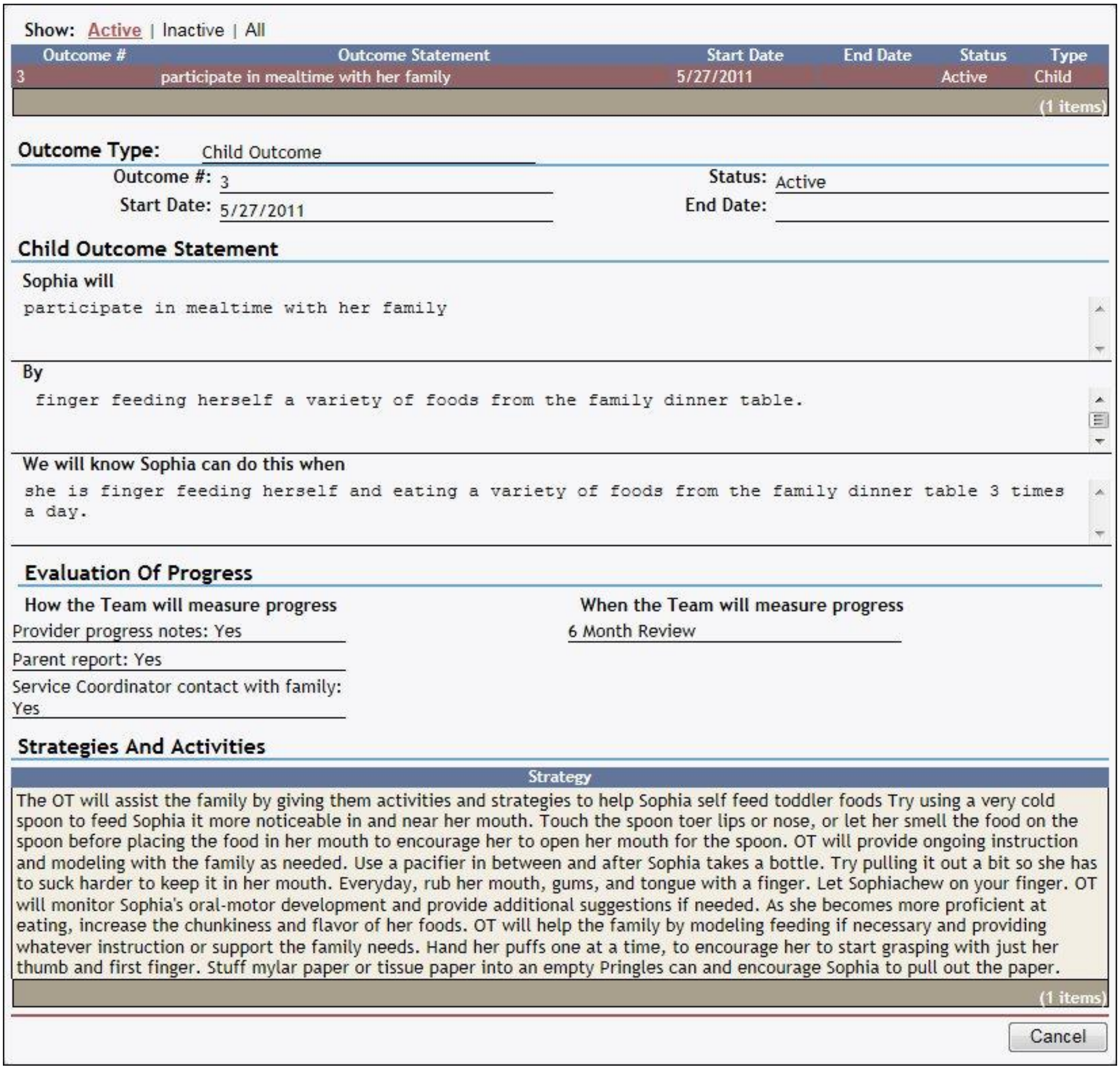
- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Outcome #** displays the sequence number of the outcome.

- **Outcome Statement** displays the description of the outcome in the format of "in **routine** by **activity**".
- **Start Date** displays the date on which the activity begins.
- **End Date** displays the date on which the activity is (or was) completed.
- **Status** displays the current status of the activity.
- **Type** indicates whether the outcome is associated with the child or family.

3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
4. The **Outcome Type** section displays detailed information about the outcome.


Show: Active | Inactive | All

Outcome #	Outcome Statement	Start Date	End Date	Status	Type
3	participate in mealtime with her family	5/27/2011		Active	Child

(1 items)

Outcome Type: Child Outcome
Outcome #: 3
Status: Active
Start Date: 5/27/2011
End Date:

Child Outcome Statement
Sophia will
participate in mealtime with her family
By
finger feeding herself a variety of foods from the family dinner table.
We will know Sophia can do this when
she is finger feeding herself and eating a variety of foods from the family dinner table 3 times a day.

Evaluation Of Progress
How the Team will measure progress
Provider progress notes: Yes
Parent report: Yes
Service Coordinator contact with family: Yes
When the Team will measure progress
6 Month Review

Strategies And Activities

Strategy
The OT will assist the family by giving them activities and strategies to help Sophia self feed toddler foods Try using a very cold spoon to feed Sophia it more noticeable in and near her mouth. Touch the spoon toer lips or nose, or let her smell the food on the spoon before placing the food in her mouth to encourage her to open her mouth for the spoon. OT will provide ongoing instruction and modeling with the family as needed. Use a pacifier in between and after Sophia takes a bottle. Try pulling it out a bit so she has to suck harder to keep it in her mouth. Everyday, rub her mouth, gums, and tongue with a finger. Let Sophiachew on your finger. OT will monitor Sophia's oral-motor development and provide additional suggestions if needed. As she becomes more proficient at eating, increase the chunkiness and flavor of her foods. OT will help the family by modeling feeding if necessary and providing whatever instruction or support the family needs. Hand her puffs one at a time, to encourage her to start grasping with just her thumb and first finger. Stuff mylar paper or tissue paper into an empty Pringles can and encourage Sophia to pull out the paper.

(1 items)

Cancel

Outcomes page (details view)

View the following information in this section as necessary:

- In **Outcome Type**, **Child Outcome** indicates that this outcome is defined for the child only. **Family Outcome** indicates whether this outcome is defined for the entire family.
- **Outcome #** displays the sequence number of the outcome.
- **Start Date** displays the date on which the activity begins.
- **Status** displays the current status of the outcome review.
- **End Date** displays a read-only label as the outcome is being added or is in process, and displays the date once the outcome has been completed.

5. The **Child Outcome Statement** section displays the statement for the child's outcome, and displays only for child outcomes.

   View the following information in this section as necessary:

   - In **Child Outcome Statement**, view the routine in which the child will participate.
   - In **By**, view the action and specific behaviors that the person will perform.
   - In **We will know [child] can do this when**, view the measurable criteria by which the routine and activity can be evaluated.

6. The **Family Outcome Statement** section displays the statement for the family's outcome, and displays only for family outcomes.

   View the following information in this section as necessary:

   - In **Family Outcome Statement**, view the routine in which the family will participate.

7. The **Evaluation Of Progress** section displays the how and when progress will be measured for the outcome.

   View the following information in this section as necessary:

   - In **How the Team will measure progress**, view how the progress towards the outcome will be evaluated by the team.
   - In **When the Team will measure progress**, view when the progress towards the outcome will be evaluated by the team.

8. The **Strategies And Activities** section displays a list of strategies or activities recorded for attaining the outcome in a table.

   View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

   - **Strategy** displays the details of the strategy or activity that will be worked on to achieve the outcome.

9. Double-click on a record in the table to view detailed information for the record selected. The Strategy page displays when double-clicked.

10. The **Outcome Review** section displays detailed review information for the outcome.

    View the following information in this section as necessary:

    - **Status** displays the current status of the outcome review.
    - In **Summary of Progress**, view review details for the outcome.

11. Click the following command button(s) as necessary.

    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Strategy

Use this page to view a strategy or activity for an outcome.

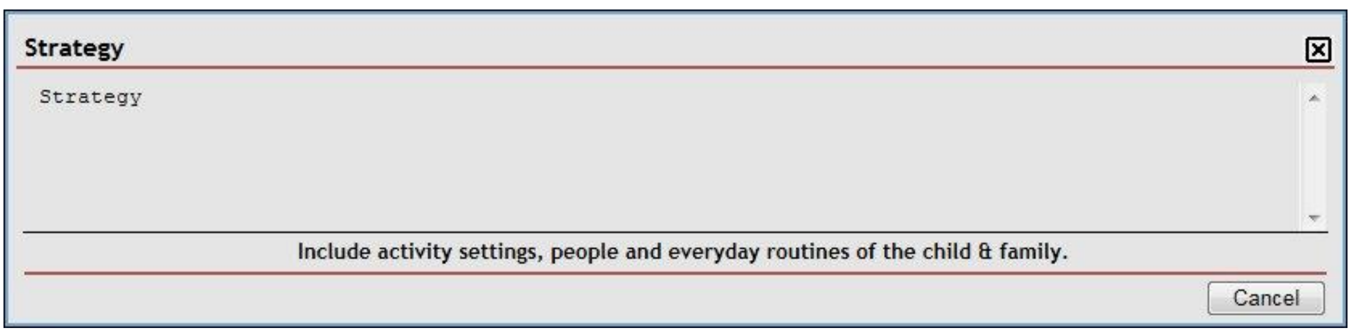
To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Outcomes** link on the selection bar. The Outcomes page displays.
- Double-click on an outcome record in the table to display the details of the outcome.
- Double-click on a strategy record in the **Strategies And Activities** table.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Outcomes** link on the selection bar. The Outcomes page displays.
- Double-click on an outcome record in the table to display the details of the outcome.
- Double-click on a strategy record in the **Strategies And Activities** table.



Strategy page (details view)

Complete the following steps to work with this page:

1. View the strategy or activity including activity settings, people, and everyday routines for the child and/or family.
2. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Parental Consent for IFSP Services

This page allows you to view parental consent information for an IFSP meeting. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Parental Consent** link.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Parental Consent** link.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Parental Consent for IFSP Services** section displays a list of parental consent records for the IFSP meeting.

Parental Consent for IFSP Services

Service Type	Start Date	End Date	Script Needed
Speech Language Pathology	3/23/2012		If MO HealthNet Enrolled
Service Coordination	3/23/2012		No
			(2 items)

Parental Consent for IFSP Services page (default view)

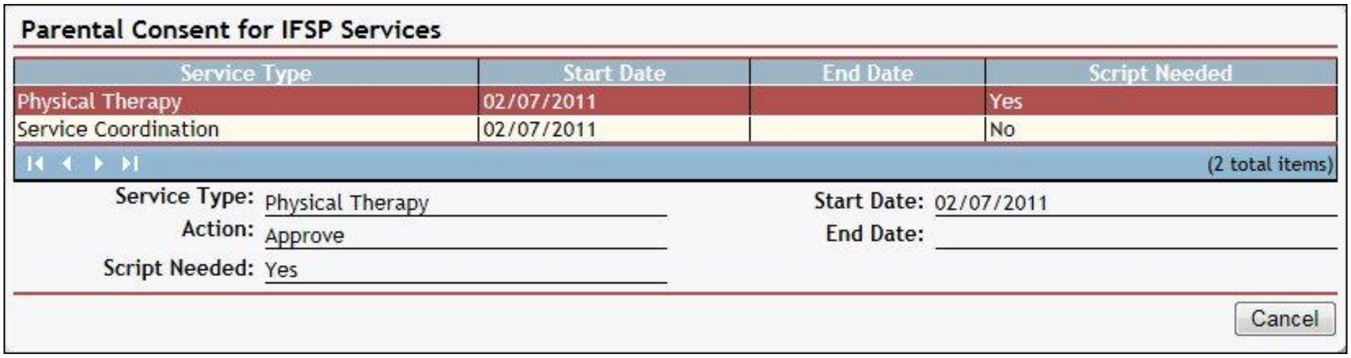
View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Service Type** displays the type of service provided.
- **Start Date** displays the date on which the activity begins.
- **End Date** displays the date on which the activity is (or was) completed.
- **Script Needed** indicates whether a physician script or prescription is needed.

NOTE: If no results are found, the table displays a single row containing the text: "No Records

> Found". For more information about tables, see the Tables topic.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
3. The **Parental Consent for IFSP Services** section displays detailed information for the parental consent record.



Parental Consent for IFSP Services page (details view)

View the following information in this section as necessary:

- In **Service Type**, view the service type.
- In **Action**, view whether the service is (or was) approved or declined.
- **Scripts Needed** indicates whether one or more physician scripts or prescriptions are needed.
- In **Start Date**, view the date on which the activity begins.
- In **End Date**, view the date on which the activity is completed.

4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Authorizations

This page allows you to view and filter for a list of authorizations for a child and to generate an Authorizations report containing a filtered list of authorizations that currently exist for the child in PDF format. Depending on the method of access, your current permissions, the child's status, and the authorization type, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Auths** link on the selection bar.

On the Child Detail page:

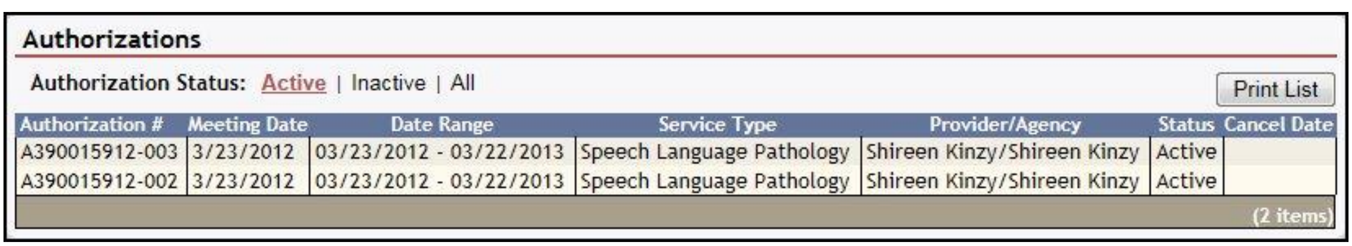
- On the **Child Detail** menu, select the **Services** menu option. A sub-menu displays.
- Select the **All Authorizations** sub-menu option.

  OR
- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Auths** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Authorizations** section displays a list of all authorizations associated with the child.



Authorizations

Authorization Status: Active | Inactive | All

Print List

Authorization #	Meeting Date	Date Range	Service Type	Provider/Agency	Status	Cancel Date
A390015912-003	3/23/2012	03/23/2012 - 03/22/2013	Speech Language Pathology	Shireen Kinzy/Shireen Kinzy	Active	
A390015912-002	3/23/2012	03/23/2012 - 03/22/2013	Speech Language Pathology	Shireen Kinzy/Shireen Kinzy	Active	

(2 items)

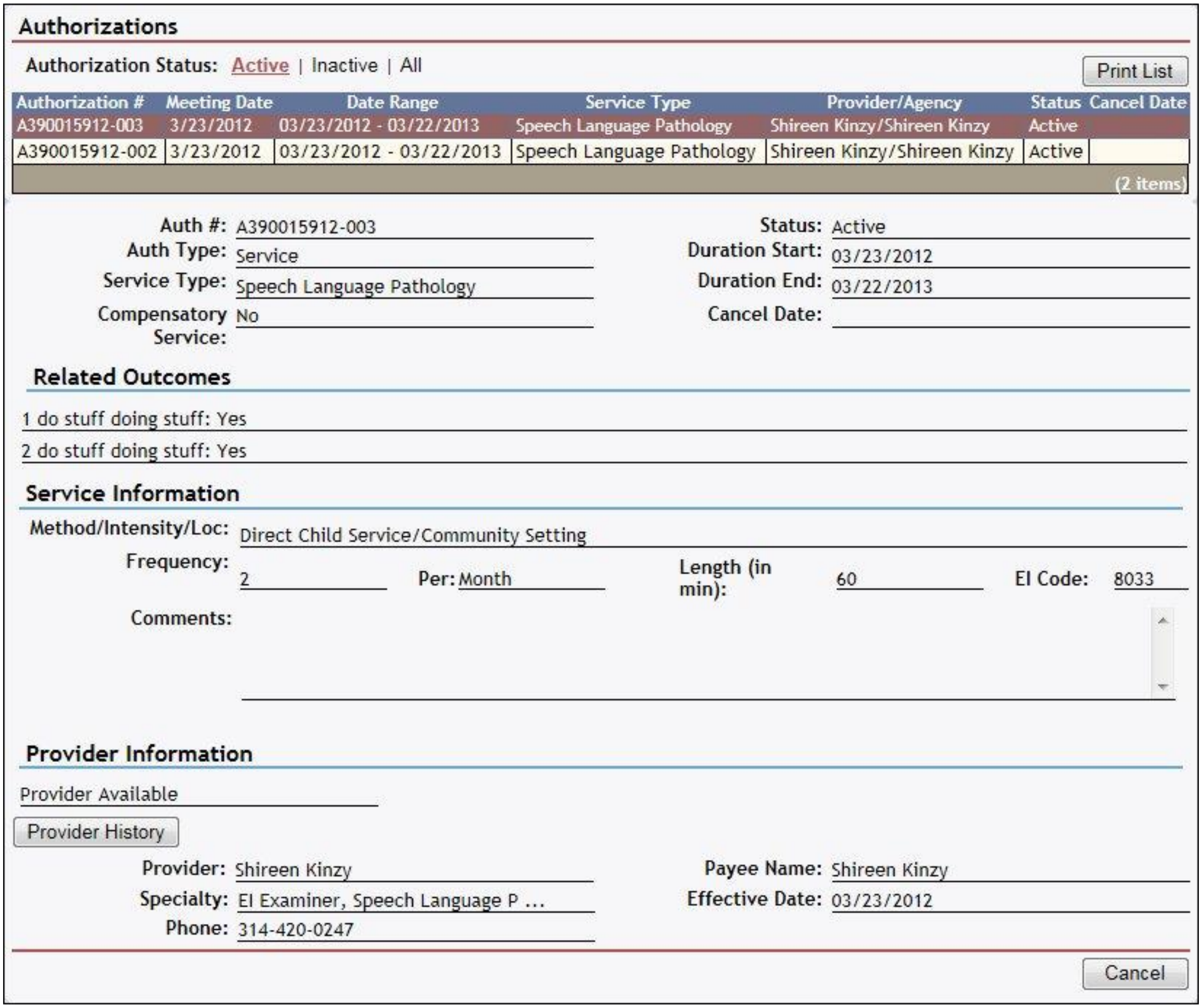
Authorizations page (default view)

Click the following links below the section heading to filter the list of records displayed in the table:

- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Authorization #/Auth #** displays the identification number for the authorization.
   - **Meeting Date** displays the date of the activity.
   - **Date Range** displays the beginning and ending dates for the activity. If the status of the authorization is "Canceled", the ending date of the date range displays the end date of the authorization.
   - **Service Type** displays the type of service provided.
   - **Provider/Agency** displays the name of the agency or provider with which the service is associated.
   - **Status** displays the current status of the activity.
   - **Cancel Date** displays the date on which the activity was discontinued or canceled.
3. Click the **Print List** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
4. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
5. The **Authorizations** section displays detailed information about the authorization.



Authorizations page (details view)

View the following information in this table as necessary:

- **Authorization #/Auth #** displays the identification number for the authorization.
- **Auth Type** displays the category of activity to which the authorization applies.
- **Consent Date** displays the date on which the parental consent was signed.

  Consent Date is available only for Evaluation/Assessment authorizations created for children in IFSP status.
- **Service Type** displays the type of service provided.
- **Compensatory Service** indicates whether the service is being performed as a compensatory service.
- **Status** displays the current status of the authorization.
- **Start Date** displays the start date of the authorization.
- **End Date** displays the end date of the authorization.
- **Cancel Date** displays the date on which the activity was discontinued or canceled.

6. The **Related Outcomes** section displays detailed information about the authorization's outcome. View the following information in this section as necessary:

- **Related Outcomes** displays a list of outcomes defined for the IFSP, and indicates which were associated to the authorization.

7. The **Related Domains** section displays detailed information about the domains related to the authorization. View the following information in this section as necessary:

- **Related Domains** indicates the domain(s) to which the issue is related.

8. The **Evaluation & Assessment Information** or **Team Meeting Information** sections display detailed information about the evaluation/assessment or team meeting. View the following information in this section as necessary:

- **Reason** displays the reason for the authorization, and is available only for evaluation/assessment authorizations.
- **Method/Intensity/Loc** displays the selected method and location of the service or meeting.
- **Frequency** displays the frequency of the activity.
- **Per** defines the frequency of the activity.
- **Length (in min)** defines the duration of the activity in minutes.
- **Max Miles** displays the maximum number of miles allowed for the transportation authorization.
- **EI Code** displays the EI identification number.
- **Comments** displays additional notes or details.

> **NOTE:** The **Evaluation & Assessment Information** section displays only for evaluation/assessment authorizations.
>
> The **Team Meeting Information** section displays only for team meeting authorizations.

9. The **Provider Information** section displays detailed information about the authorization's provider. View the following information in this section as necessary:

- **Provider/No Provider Available** indicates whether provider information was available.
- **Provider** displays the name of the service provider.
- **Specialty** displays the individual's specialty.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Payee Name** displays the name of the person or group to which payment is made.
- **Effective Date** displays the date on which the item becomes (or became) active or assigned.

  The date displayed is the effective date of the provider's assignment.

11. Click the **Provider History** button to display a historical list of providers.

Provider Name	Start Date	End Date
Jeri Neumann	5/30/2012	8/16/2012
		(1 items)

Provider: Jeri Neumann
Payee Name: Therapeutic Playtime
Specialty: EI Examiner, Special Instructo ...
Effective Date: 05/30/2012
Phone: 636-464-5439

Provider History table (with most recent provider's details displayed below the table)

12. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Provider Name** displays the name of the service provider.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

The most recent provider's details are displayed below the table by default. Double-click on a provider in the table to view detailed information about the provider selected.

13. Click the following command button(s) as necessary.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Other Services

This page allows you to view other services for an IFSP meeting. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Other Services** link on the selection bar.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Other Services** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Other Services** section displays a list of other services for the IFSP meeting.

Other Services

Service	Start Date	End Date	Person Responsible
Service Name 1	10/2/2012		Family
Service Name 2	10/4/2012		Service Coordinator
			(2 items)

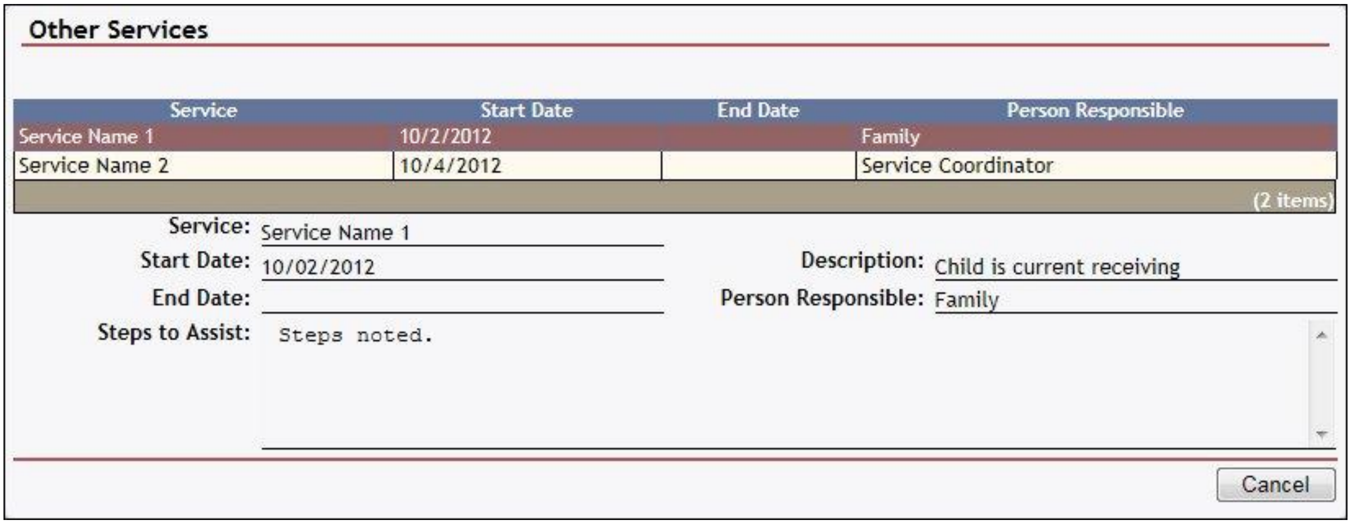
Other Services page (default view)

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Service** displays the service type of the activity.
- **Start Date** displays the date on which the activity begins.
- **End Date** displays the date on which the activity is (or was) completed.
- **Funding Source** displays the source of funding for the activity.
- **Person Responsible** displays the first and last name of the responsible party.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
3. The **Other Services** section displays detailed information about the other service.



Other Services page (details view)

View the following information in this section as necessary:

- In **Service**, view the name of the service.
- In **Start Date**, view the date on which the activity begins.
- In **End Date**, view the date on which the activity is completed.
- In **Description**, view additional descriptive information.
- In **Person Responsible**, view the responsible party.
- In **Steps to Assist**, view additional comments or details.

4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Transition

This page allows you to view transition topics for an IFSP meeting. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Transition** link on the selection bar.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Transition** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Transition** section displays a list of transition topics for the IFSP meeting.

Transition

Transition Topic	Transition Activities
Discussion with parent regarding what "Transition" from Early Intervention means.	Discussion with FirstSteps,School District and Fam
Other transitions or changes for the family.	Activities noted.
	(2 items)

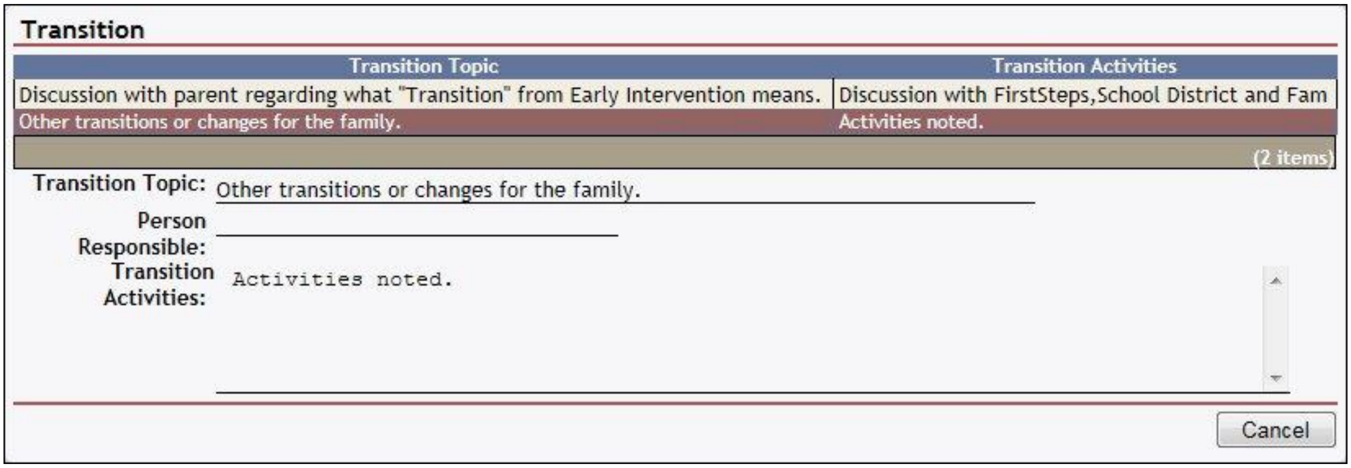
Transition page (default view)

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Service** displays the service type of the activity.
- **Start Date** displays the date on which the activity begins.
- **End Date** displays the date on which the activity is (or was) completed.
- **Funding Source** displays the source of funding for the activity.
- **Person Responsible** displays the first and last name of the responsible party.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
3. The **Transition** section displays detailed information about the transition topic.



Transition page (details view)

View the following information in this section as necessary:

- In **Transition Topic**, view the transition topic.
- In **Person Responsible**, view the responsible party.
- In **Transition Activities**, view the activities that fulfill the transition topic.

4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Team Communication

This page allows you to view team communications for an IFSP meeting. Depending on the method of access and your current permissions, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Team Comm** link on the selection bar.

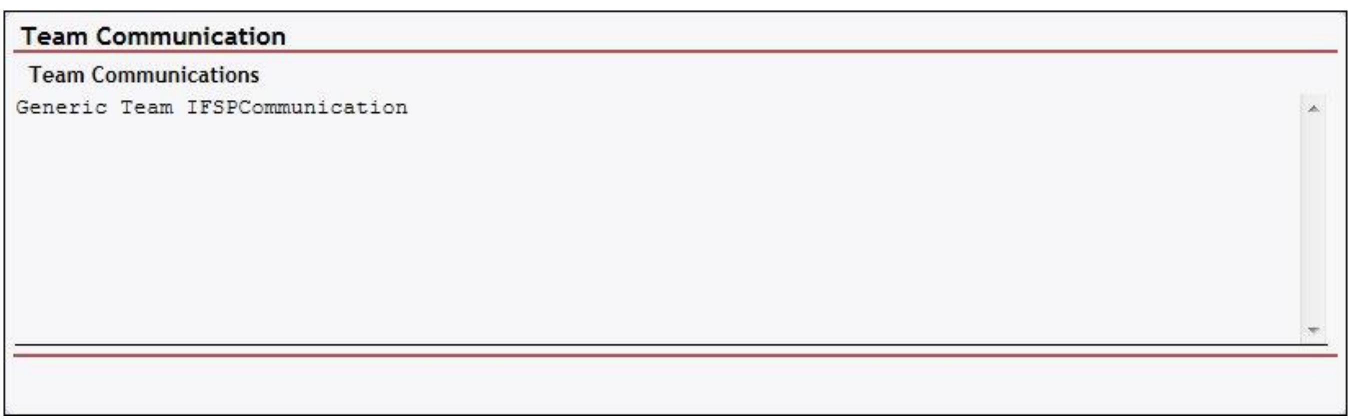
On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Team Comm** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Team Communication** section displays detailed team communication information.



Team Communication page (details view)

In **Team Communications**, view the team communication details.

2. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

IFSP Team

IFSP Team Members

This page allows you to work with a list of members on an IFSP team for a child. Depending on the method of access, your current permissions, and the team member type, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Team** sub-menu option.

Complete the following steps to work with this page:

1. The **IFSP Team Members** section displays a list of IFSP team members for the child.

IFSP Team Members

Show: Active | Inactive | All

Member Name / Agency	Role	Specialty	Phone	Start Date	End Date
Steel-pink jump	Parent or Guardian		555-555-5555	3/23/2012	
Shireen Kinzy / Shireen Kinzy	Ongoing Service Provider	EI Examiner,Speech Language Pathologist	314-420-0247	3/23/2012	
Kara Cole / The Daulton Group, Inc Reg 5	Service Coordinator	Service Coordinator,Intake Coordinator	816-363-1078	10/1/2012	

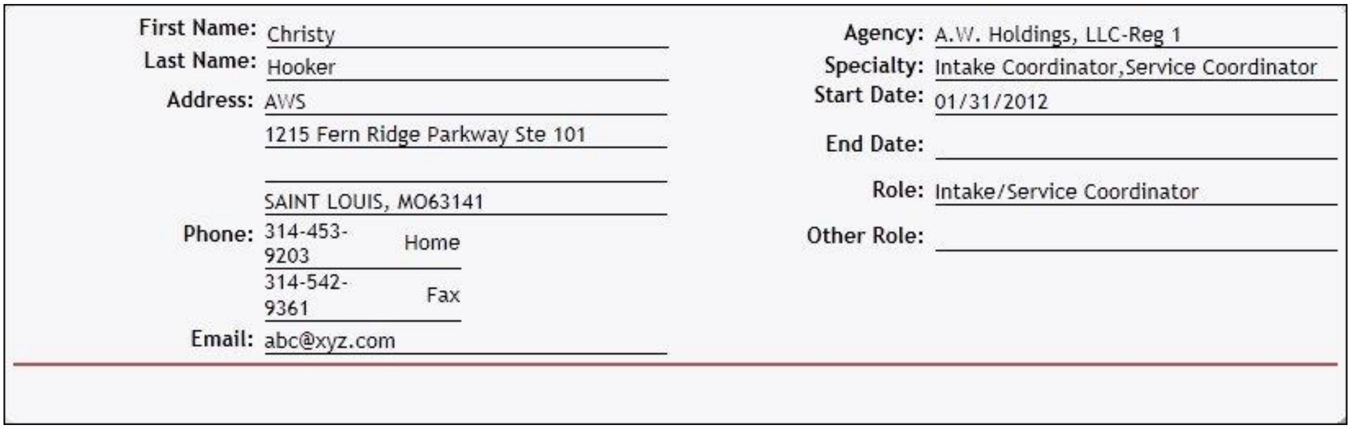
(3 items)

IFSP Team Members page (default view)

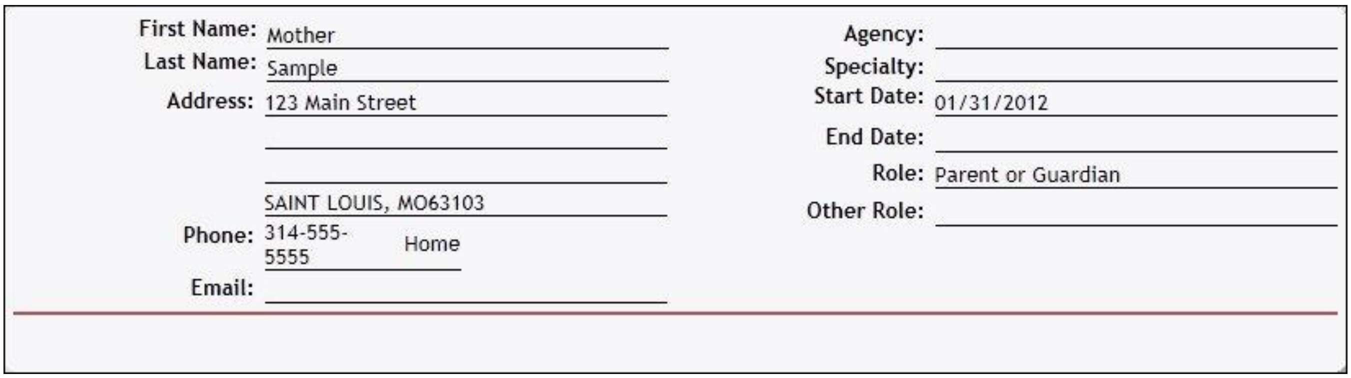
View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Member Name/Agency** displays the first and last name of the person and the name of the agency with which the person is associated.
- **Role** displays the role currently assigned to the person.
- **Specialty** displays the individual's specialty.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



IFSP Team Members page (Enrolled details view)



IFSP Team Members page (Unenrolled details view)

View the following information in this section as necessary:

- **First Name** displays the person's first name.
- **Last Name** displays the person's last name.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Agency** displays the name of the agency with which the person is associated (if applicable).
- **Specialty** displays the individual's specialty.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
- In **Role**, view the specific role assigned to the person.
- In **Other Role**, view any additional roles to assign to the person.

3. Click the following command button(s) as necessary.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Services

Authorizations

This page allows you to view and filter for a list of authorizations for a child and to generate an Authorizations report containing a filtered list of authorizations that currently exist for the child in PDF format. Depending on the method of access, your current permissions, the child's status, and the authorization type, this page displays differently and some information may be disabled or unavailable.

NOTE: This page is unavailable for meetings with a status of Tentative, Canceled, or Rescheduled.

To access this page, complete the following steps:

On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a record in the table. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Auths** link on the selection bar.

On the Child Detail page:

- On the **Child Detail** menu, select the **Services** menu option. A sub-menu displays.
- Select the **All Authorizations** sub-menu option.
  OR
- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option. The IFSP Meetings page displays.
- Double-click on a Scheduled, Ongoing, or Finalized meeting in the table. The IFSP Meetings selection bar displays.
- Click the **Auths** link on the selection bar.

NOTE: When working with IFSP meeting details, a selection bar is available on this page. For more information about the selection bar, see IFSP Meetings selection bar.

Complete the following steps to work with this page:

1. The **Authorizations** section displays a list of all authorizations associated with the child.

Authorizations

Authorization Status: Active | Inactive | All

Print List

Authorization #	Meeting Date	Date Range	Service Type	Provider/Agency	Status	Cancel Date
A390015912-003	3/23/2012	03/23/2012 - 03/22/2013	Speech Language Pathology	Shireen Kinzy/Shireen Kinzy	Active	
A390015912-002	3/23/2012	03/23/2012 - 03/22/2013	Speech Language Pathology	Shireen Kinzy/Shireen Kinzy	Active	

(2 items)

Authorizations page (default view)

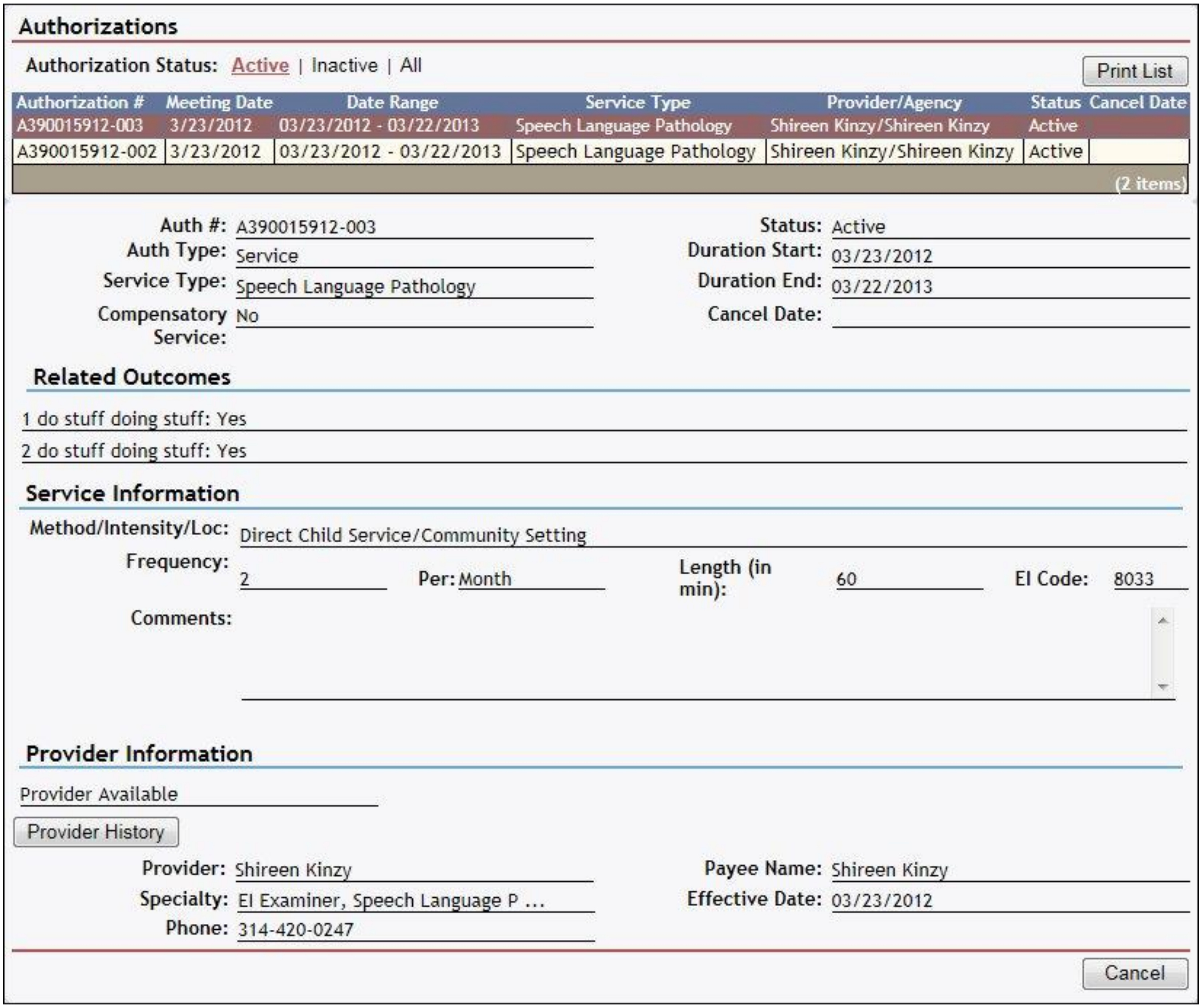
Click the following links below the section heading to filter the list of records displayed in the table:

- Click **Active** to only display results that are currently active.

- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Authorization #/Auth #** displays the identification number for the authorization.
   - **Meeting Date** displays the date of the activity.
   - **Date Range** displays the beginning and ending dates for the activity. If the status of the authorization is "Canceled", the ending date of the date range displays the end date of the authorization.
   - **Service Type** displays the type of service provided.
   - **Provider/Agency** displays the name of the agency or provider with which the service is associated.
   - **Status** displays the current status of the activity.
   - **Cancel Date** displays the date on which the activity was discontinued or canceled.
3. Click the **Print List** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
4. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.
5. The **Authorizations** section displays detailed information about the authorization.


Authorizations

Authorization Status: Active | Inactive | All

Print List

Authorization #	Meeting Date	Date Range	Service Type	Provider/Agency	Status	Cancel Date
A390015912-003	3/23/2012	03/23/2012 - 03/22/2013	Speech Language Pathology	Shireen Kinzy/Shireen Kinzy	Active	
A390015912-002	3/23/2012	03/23/2012 - 03/22/2013	Speech Language Pathology	Shireen Kinzy/Shireen Kinzy	Active	

(2 items)

Auth #: A390015912-003
Auth Type: Service
Service Type: Speech Language Pathology
Compensatory Service: No
Status: Active
Duration Start: 03/23/2012
Duration End: 03/22/2013
Cancel Date:

Related Outcomes

1 do stuff doing stuff: Yes
2 do stuff doing stuff: Yes

Service Information

Method/Intensity/Loc: Direct Child Service/Community Setting
Frequency: 2 Per: Month Length (in min): 60 EI Code: 8033
Comments:

Provider Information

Provider Available

Provider History

Provider: Shireen Kinzy
Specialty: EI Examiner, Speech Language P ...
Phone: 314-420-0247
Payee Name: Shireen Kinzy
Effective Date: 03/23/2012

Cancel

Authorizations page (details view)

View the following information in this table as necessary:

- **Authorization #/Auth #** displays the identification number for the authorization.
- **Auth Type** displays the category of activity to which the authorization applies.
- **Consent Date** displays the date on which the parental consent was signed.

  Consent Date is available only for Evaluation/Assessment authorizations created for children in IFSP status.
- **Service Type** displays the type of service provided.
- **Compensatory Service** indicates whether the service is being performed as a compensatory service.
- **Status** displays the current status of the authorization.
- **Start Date** displays the start date of the authorization.
- **End Date** displays the end date of the authorization.
- **Cancel Date** displays the date on which the activity was discontinued or canceled.

6. The **Related Outcomes** section displays detailed information about the authorization's outcome. View the following information in this section as necessary:

- **Related Outcomes** displays a list of outcomes defined for the IFSP, and indicates which were associated to the authorization.

7. The **Related Domains** section displays detailed information about the domains related to the authorization. View the following information in this section as necessary:
    - **Related Domains** indicates the domain(s) to which the issue is related.
8. The **Evaluation & Assessment Information** or **Team Meeting Information** sections display detailed information about the evaluation/assessment or team meeting. View the following information in this section as necessary:
    - **Reason** displays the reason for the authorization, and is available only for evaluation/assessment authorizations.
    - **Method/Intensity/Loc** displays the selected method and location of the service or meeting.
    - **Frequency** displays the frequency of the activity.
    - **Per** defines the frequency of the activity.
    - **Length (in min)** defines the duration of the activity in minutes.
    - **Max Miles** displays the maximum number of miles allowed for the transportation authorization.
    - **EI Code** displays the EI identification number.
    - **Comments** displays additional notes or details.

> **NOTE:** The **Evaluation & Assessment Information** section displays only for evaluation/assessment authorizations.
>
> The **Team Meeting Information** section displays only for team meeting authorizations.

9. The **Provider Information** section displays detailed information about the authorization's provider. View the following information in this section as necessary:
    - **Provider/No Provider Available** indicates whether provider information was available.
    - **Provider** displays the name of the service provider.
    - **Specialty** displays the individual's specialty.
    - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
    - **Payee Name** displays the name of the person or group to which payment is made.
    - **Effective Date** displays the date on which the item becomes (or became) active or assigned.

      The date displayed is the effective date of the provider's assignment.

11. Click the **Provider History** button to display a historical list of providers.

Provider Name	Start Date	End Date
Jeri Neumann	5/30/2012	8/16/2012
		(1 items)

Provider:	Jeri Neumann	Payee Name:	Therapeutic Playtime
Specialty:	EI Examiner, Special Instructo ...	Effective Date:	05/30/2012
Phone:	636-464-5439		

Provider History table (with most recent provider's details displayed below the table)

12. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
    - **Provider Name** displays the name of the service provider.
    - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
    - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

The most recent provider's details are displayed below the table by default. Double-click on a provider in the table to view detailed information about the provider selected.

13. Click the following command button(s) as necessary.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Progress Notes

This page allows you to work with the details of progress notes recorded for a child. Depending on the method of access, your current permissions, and the type of progress note, this page displays differently and some information may be disabled or unavailable.

To access this page, complete the following steps:

On the Home page:

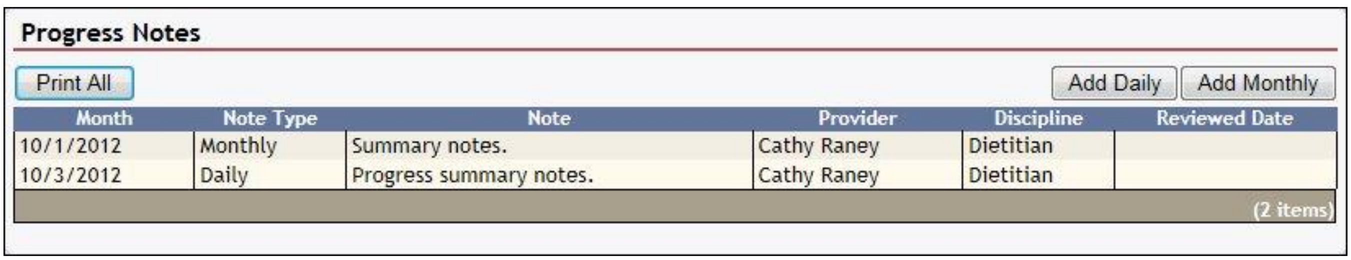
- In the **Notes** section, select the **Progress Notes to Review** link. The Progress Notes Pending Review page displays.
- Double-click on a record in the table.

On the Child Detail page:

- On the **Child Detail** menu, select the **Services** menu option. A sub-menu displays.
- Select the **Progress Notes** sub-menu option.

On the Authorization Detail page:

- Click the **Enter Progress Notes** button.



Progress Notes

Print All | Add Daily | Add Monthly

Month	Note Type	Note	Provider	Discipline	Reviewed Date
10/1/2012	Monthly	Summary notes.	Cathy Raney	Dietitian	
10/3/2012	Daily	Progress summary notes.	Cathy Raney	Dietitian	

(2 items)

Progress Notes page (default view)

Complete the following steps to work with this page:

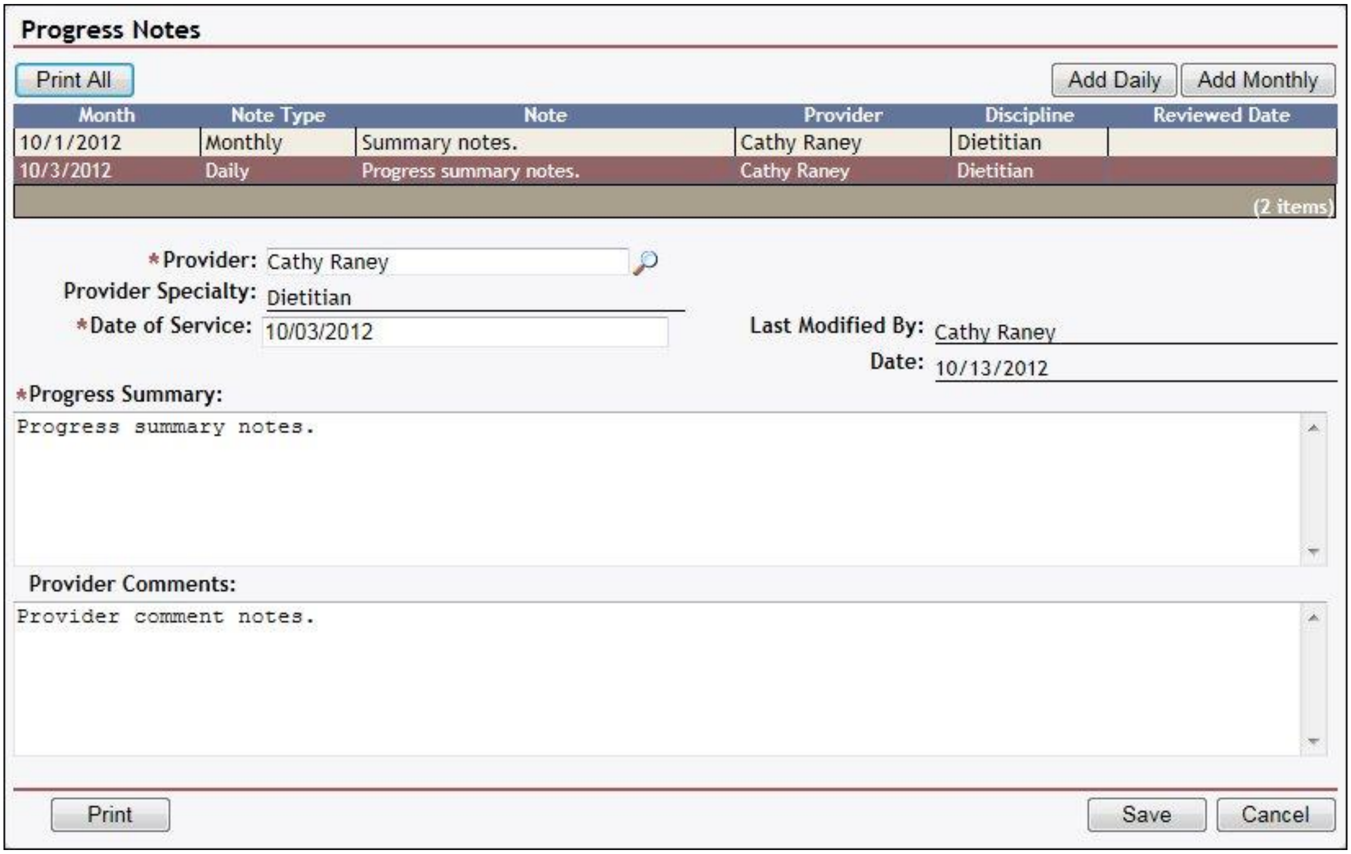
1. The **Progress Notes** section displays a list of progress notes for the child. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Month** displays the date of service recorded for the progress note.
   - **Note Type** indicates the type of note created.
   - **Note** displays the first 50 characters of the note.
   - **Provider** displays the name of the service provider.
   - **Discipline** displays the service provider's discipline or specialty.
   - **Reviewed Date** displays the date of the review.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Click the **Print All** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

   OR

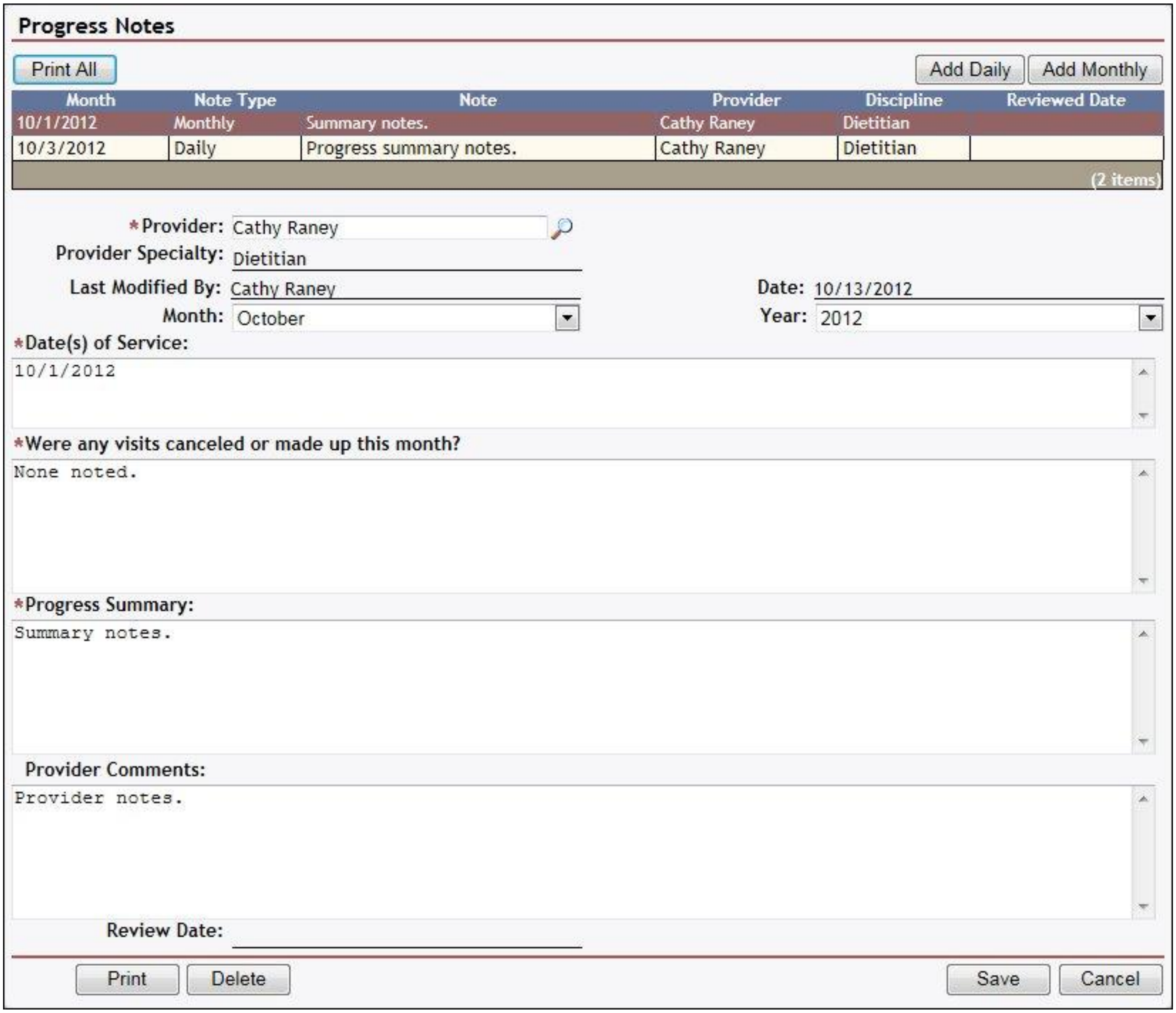
   Click the **Add Daily** button or the **Add Monthly** button to add a new progress note.



Progress Notes page (daily details view)

NOTE: The page displays differently based on the type of progress note being viewed or added:

- If viewing or adding a daily progress note, the page displays in daily view (pictured above).
- If viewing or adding a monthly progress note, the page displays in monthly view (pictured below).



Progress Notes page (monthly details view)

NOTE: Once a progress note has been reviewed by a Coordinator or a Director, the information on this page is read-only and cannot be updated.

4. The **Progress Notes** section displays detailed information about the progress note. View the following information in this section as necessary:

- In **Provider**, view the name of the service provider. Click the button to the right of the **Provider** control to search for and select a service provider. The Provider Search page displays when clicked.
- In **Provider Specialty**, enter the specialty of the provider. At least two characters must be added, and you can enter up to 40 characters as necessary.
- **Last Modified By** displays the first and last name of the person who last updated the note.
- In **Date of Service**, enter the month, day, and year on which the service was administered. **Date of Service** is available only for daily progress notes. For more information about entering dates, see the Calendar Controls topic.
- In **Month**, select the service month from the drop-down list. **Month** is available only for monthly progress notes.

- **Date** displays the date on which the note was created.
- In **Year**, select the service year for the progress note from the drop-down list. **Year** is available only for monthly progress notes.
- In **Date(s) of Service**, view or update the date(s) on which the service was administered. **Date(s) of Service** is available only for monthly progress notes.
- In **Were any visits canceled or made up this month**, view or update the details regarding any cancelled service visits. At least 1 character must be entered, and up to 1000 characters can be entered as necessary. This control is only available for monthly progress notes.
- In **Progress Summary**, view or update the summary of the child's progress. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.
- In **Provider Comments**, view or update additional notes or details. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.

> **NOTE:** Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page when attempting to save the data.

5. Click the following command button(s) as necessary.
   - Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.

     The **Print** button is not available when adding a new record.
   - Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

EI Teams

EI Teams

This page allows you to work with EI Teams.

To access this page, complete the following steps:

On the main menu bar:

- On the **EI Team** menu, select the **EI Teams** menu option.

Complete the following steps to work with this page:

1. The **EI Teams** section displays a list of EI Teams.

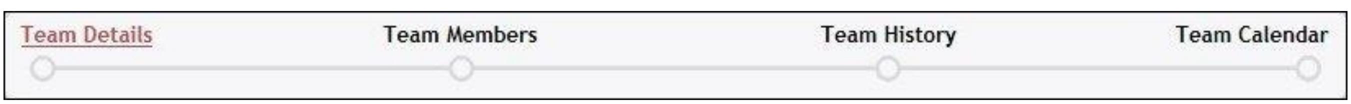
EI Teams

Team Name	Location	Members
2 North Team - C	St. Louis County - Region 2	Theresa Gaeng, Katrina Ringo, Barbara Willingham, Karen Fernandez-Salvador, Sarah Kirchoff, Nicole Lanius, Christina Volkman, Kathryn Lowrey, Amy McKay, Deanna Walter, Tracie Hope, Marguerite "Peggy" Jacobs, Alison Babb, Ashley Hinds, Julie Drafall, Christina Closson, Meghan Wolf, Megan Wall, Brittany Musick, Cathy Raney, Kara Cole

(1 items)

EI Teams page (default view) Coordinator/

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Team Name** displays the name of the EI Team.
   - **Location** displays the name of the SPOE location.
   - **Members** displays the first and last names of the members on the EI Team.
3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

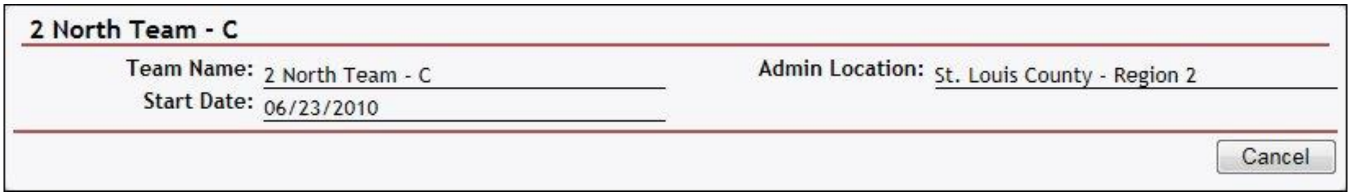


EI Teams page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Team Details** link to display the EI Teams page.
- Click the **Team Members** link to display the EI Team Members page.
- Click the **Team History** link to display the EI Team History page.
- Click the **Team Calendar** link to display the EI Team Meeting Calendar page.

4. The **Team Details** section displays detailed information about the EI Team.



EI Teams page (details view)

View the following information in this section as necessary:

- In **Team Name**, view the name of the EI Team.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **Admin Location** displays the name and region identification of the administrative location.

5. Click the following command button(s) as necessary.

- Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

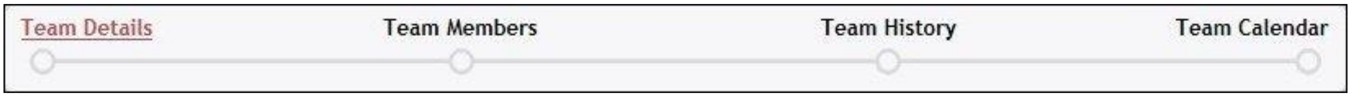
EI Team Members

This page allows you to work with EI Team member information.

To access this page, complete the following steps:

On the EI Teams page:

- Double-click on a record in the table. The EI Teams selection bar displays.
- Click the **Team Members** link on the selection bar.



EI Teams page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Team Details** link to display the EI Teams page.
- Click the **Team Members** link to display the EI Team Members page.
- Click the **Team History** link to display the EI Team History page.
- Click the **Team Calendar** link to display the EI Team Meeting Calendar page.

Complete the following steps to work with this page:

1. The **EI Team Members** section displays a list of EI Team members.

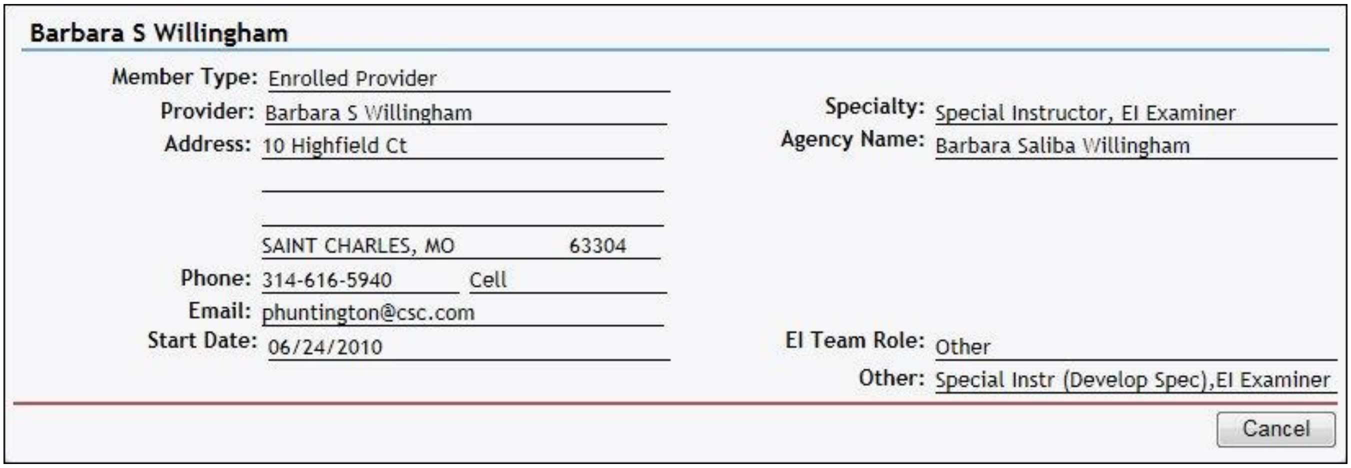
EI Teams

Team Name	Location	Members
2 North Team - C	St. Louis County - Region 2	Theresa Gaeng, Katrina Ringo, Barbara Willingham, Karen Fernandez-Salvador, Sarah Kirchoff, Nicole Lanius, Christina Volkman, Kathryn Lowrey, Amy McKay, Deanna Walter, Tracie Hope, Marguerite "Peggy" Jacobs, Alison Babb, Ashley Hinds, Julie Drafall, Christina Closson, Meghan Wolf, Megan Wall, Brittany Musick, Cathy Raney, Kara Cole

(1 items)

EI Teams page (default view) Coordinator/

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Last Name** displays the person's last name.
   - **First Name** displays the person's first name.
   - **Team Role** displays the specific role that the team member will play on the EI Team.
   - **Agency Name** displays the name of the agency with which the person is associated (if applicable).
   - **Specialty** displays the individual's specialty.
3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Team Members page (details view)

4. View the following information as necessary:

- In **Member Type** , view whether the team member is an **Enrolled Provider, and Unenrolled Member**, or a **SPOE Contractor**.

For enrolled providers, view the following information as necessary:

- **Provider** displays the name of the service provider.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **Specialty** displays the individual's specialty.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **EI Team Role**, view the person's role on the team.
  - **Service Coordinator** indicates whether the provider is the team's service coordinator.
  - **Other** indicates whether provider has an additional role other than the team's service coordinator. When **Other** is specified, the **Other** field is available.

For unenrolled members, view the following information as necessary:

- **First Name** displays the person's first name.
- **Last Name** displays the person's last name.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **Specialty** displays the individual's specialty.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **EI Team Role**, view the person's role on the team.
  - **Service Coordinator** indicates whether the provider is the team's service coordinator.
  - **Other** indicates whether provider has an additional role other than the team's service coordinator. When **Other** is specified, the **Other** field is available.

For SPOE contractors, view the following information as necessary:

- In **Contractor**, view the name of the SPOE contractor.
- In **Start Date**, view the date on which the activity begins.
- **Specialty** displays the individual's specialty.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **EI Team Role**, view the person's role on the team.
  - **Service Coordinator** indicates whether the provider is the team's service coordinator.

  - **Other** indicates whether provider has an additional role other than the team's service coordinator. When **Other** is specified, the **Other** field is available.

5. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

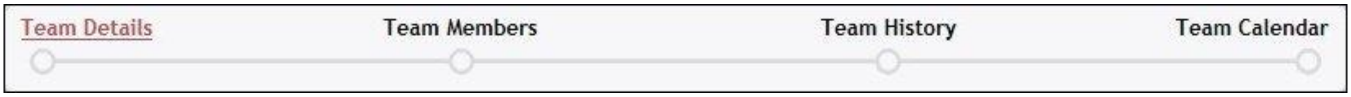
EI Team History

This page allows you to view a list of historical records for an EI Team.

To access this page, complete the following steps:

On the EI Teams page:

- Double-click on a record in the table. The EI Teams selection bar displays.
- Click the **Team History** link on the selection bar.



EI Teams page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Team Details** link to display the EI Teams page.
- Click the **Team Members** link to display the EI Team Members page.
- Click the **Team History** link to display the EI Team History page.
- Click the **Team Calendar** link to display the EI Team Meeting Calendar page.

Complete the following steps to work with this page:

1. The **EI Team History** section displays a list of historical records for the EI Team.

2 North Team - C: History

Timestamp	Description	User Name
6/23/2010	Team Created - North Team - C at Jun 23 2010 12:00AM	Ashlie Klopper
6/23/2010	Added Team Member - Theresa Gaeng with Start Date of Jun 23 2010 12:00AM	Ashlie Klopper
6/23/2010	Added Team Member - Katrina Ringo with Start Date of Jun 23 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Elaine Miazga with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Barbara Willingham with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Julie Drafall with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Melissa Garrett with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Karen Fernandez-Salvador with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Sarah Kirchoff with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper
6/24/2010	Added Team Member - Ashley Hinds with Start Date of Jun 24 2010 12:00AM	Ashlie Klopper

Page 1 of 6 (52 items)

EI Team History page (default view)

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Timestamp** displays the date and time at which the historical record was created.
   - **Description** displays additional descriptive information.
   - **User Name** displays the name of the user who created the historical record.

Team Calendar

EI Team Meeting Calendar

This page allows you to view the EI Team meetings scheduled.

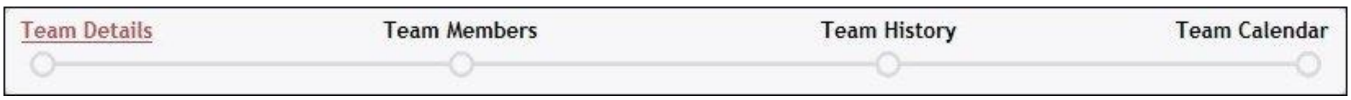
To access this page, complete the following steps:

On the main menu bar:

- On the **EI Team** menu, select the **Meeting Calendar** menu option.

On the EI Teams page:

- Double-click on a record in the table. The EI Teams selection bar displays.
- Click the **Team Calendar** link on the selection bar.



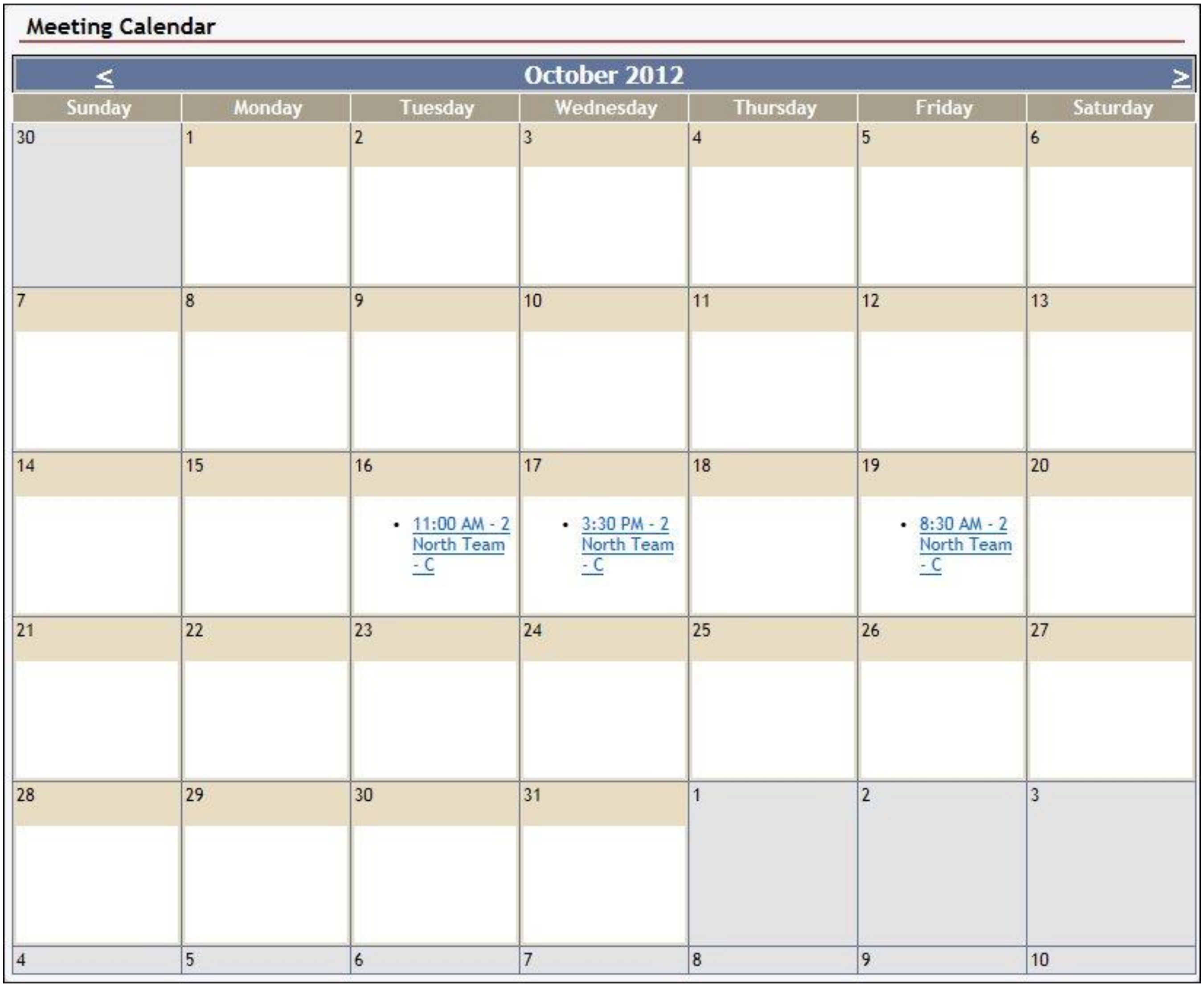
EI Teams page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Team Details** link to display the EI Teams page.
- Click the **Team Members** link to display the EI Team Members page.
- Click the **Team History** link to display the EI Team History page.
- Click the **Team Calendar** link to display the EI Team Meeting Calendar page.

Complete the following steps to work with this page:

1. The **Meeting Calendar** section displays meetings currently scheduled for EI teams and defaults to the current month.



EI Team Meeting Calendar page (default view)

2. Click an EI Team link on the calendar to display the EI Team Meeting page for the EI Team selected.

EI Team Meeting

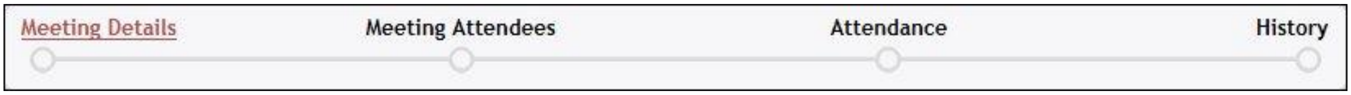
Use this page to view the details or history of an EI Team meeting, to delete or reschedule an EI Team meeting, to add attendees to an EI Team meeting, and/or to record attendance for an EI Team meeting.

This page allows you to view the EI Team meetings scheduled.

To access this page, complete the following steps:

On the EI Team Meeting Calendar page:

- Click an EI Team link on the calendar.



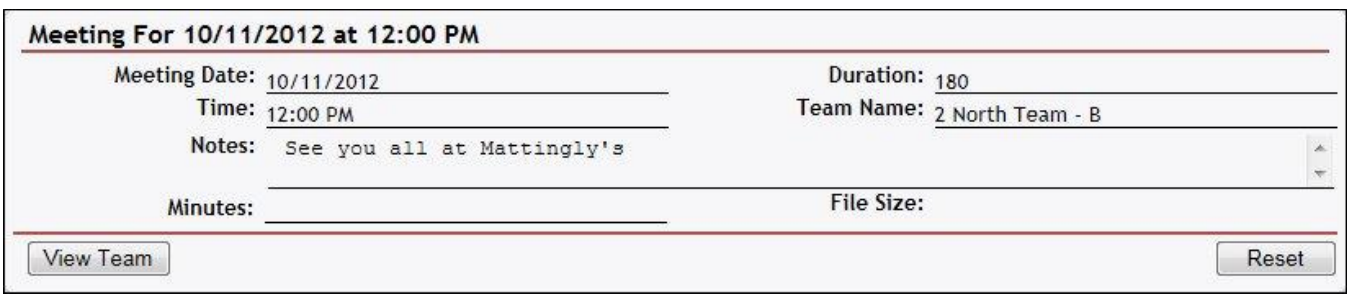
EI Team Meeting page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Meeting Details** link to display the EI Team Meeting page.
- Click the **Meeting Attendees** link to display the EI Team Meeting Attendees page.
- Click the **Attendance** link to display the EI Team Meeting Attendance page.
- Click the **History** link to display the EI Team Meeting History page.

Complete the following steps to work with this page:

1. The **Meeting** section displays detailed information about the EI Team meeting.



EI Team Meeting page (default view)

View the following information in this section as necessary:

- In **Meeting Date**, view the date on which the meeting is (or was) scheduled.
- In **Meeting Time**, view the time at which the meeting is (or was) scheduled in hh:mm AM/PM format.
- In **Notes**, view additional comments or details.
- In **Duration**, view the amount of time that the person attended the meeting in 15 minute increments.
- **Team Name** displays the name of the EI Team for which the meeting is scheduled.
- **Minutes** displays the file name and file extension of the document attachment that has been uploaded for this meeting, if applicable.

2. Click the following command button(s) as necessary.
   - Click the **Download** button to download the file currently to your local workstation. If a file has not been uploaded, the **Download** button is unavailable. For more information about downloading files, please see documentation specific to your current web browser and/or your operating system.

- Click the **View Team** button to display the EI Teams page.
- Click the **Reset** button to discard any changes, reset all of the date to its last saved date, and continue working on this page.

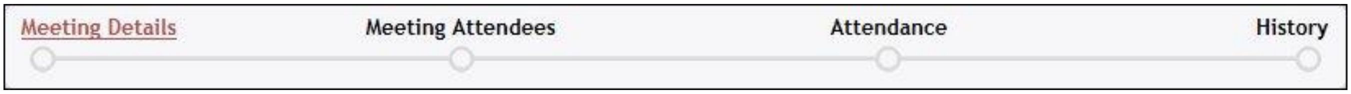
EI Team Meeting Attendees

This page allows you to view the attendees for an EI Team meeting.

To access this page, complete the following steps:

On the EI Team Meeting page:

- Click the **Meeting Attendees** link on the selection bar.



EI Team Meeting page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Meeting Details** link to display the EI Team Meeting page.
- Click the **Meeting Attendees** link to display the EI Team Meeting Attendees page.
- Click the **Attendance** link to display the EI Team Meeting Attendance page.
- Click the **History** link to display the EI Team Meeting History page.

Complete the following steps to work with this page:

1. The **Meeting** section displays a list of all team members who are currently scheduled to attend the EI Team meeting.

Meeting For 10/16/2012 At 7:30 PM Attendees

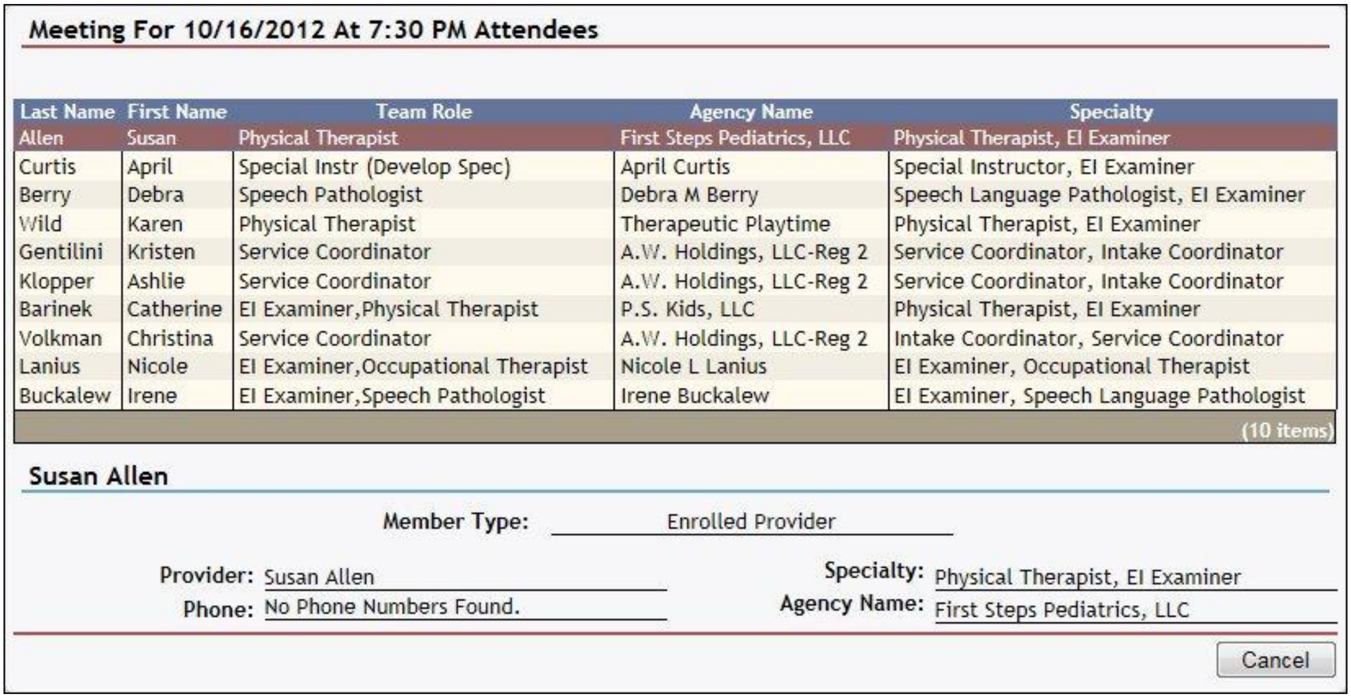
Last Name	First Name	Team Role	Agency Name	Specialty
Allen	Susan	Physical Therapist	First Steps Pediatrics, LLC	Physical Therapist, EI Examiner
Curtis	April	Special Instr (Develop Spec)	April Curtis	Special Instructor, EI Examiner
Berry	Debra	Speech Pathologist	Debra M Berry	Speech Language Pathologist, EI Examiner
Wild	Karen	Physical Therapist	Therapeutic Playtime	Physical Therapist, EI Examiner
Gentilini	Kristen	Service Coordinator	A.W. Holdings, LLC-Reg 2	Service Coordinator, Intake Coordinator
Klopper	Ashlie	Service Coordinator	A.W. Holdings, LLC-Reg 2	Service Coordinator, Intake Coordinator
Barinek	Catherine	EI Examiner,Physical Therapist	P.S. Kids, LLC	Physical Therapist, EI Examiner
Volkman	Christina	Service Coordinator	A.W. Holdings, LLC-Reg 2	Intake Coordinator, Service Coordinator
Lanius	Nicole	EI Examiner,Occupational Therapist	Nicole L Lanius	EI Examiner, Occupational Therapist
Buckalew	Irene	EI Examiner,Speech Pathologist	Irene Buckalew	EI Examiner, Speech Language Pathologist

(10 items)

EI Team Meeting Attendees page (default view)

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Last Name** displays the person's last name.
   - **First Name** displays the person's first name.
   - **Team Role** displays the specific role that the team member will play on the EI Team.
   - **Agency Name** displays the name of the agency with which the person is associated (if applicable).
   - **Specialty** displays the individual's specialty.
3. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

4. The **Attendee** section displays detailed information about the attendee.


Meeting For 10/16/2012 At 7:30 PM Attendees

Last Name	First Name	Team Role	Agency Name	Specialty
Allen	Susan	Physical Therapist	First Steps Pediatrics, LLC	Physical Therapist, EI Examiner
Curtis	April	Special Instr (Develop Spec)	April Curtis	Special Instructor, EI Examiner
Berry	Debra	Speech Pathologist	Debra M Berry	Speech Language Pathologist, EI Examiner
Wild	Karen	Physical Therapist	Therapeutic Playtime	Physical Therapist, EI Examiner
Gentilini	Kristen	Service Coordinator	A.W. Holdings, LLC-Reg 2	Service Coordinator, Intake Coordinator
Klopper	Ashlie	Service Coordinator	A.W. Holdings, LLC-Reg 2	Service Coordinator, Intake Coordinator
Barinek	Catherine	EI Examiner,Physical Therapist	P.S. Kids, LLC	Physical Therapist, EI Examiner
Volkman	Christina	Service Coordinator	A.W. Holdings, LLC-Reg 2	Intake Coordinator, Service Coordinator
Lanius	Nicole	EI Examiner,Occupational Therapist	Nicole L Lanius	EI Examiner, Occupational Therapist
Buckalew	Irene	EI Examiner,Speech Pathologist	Irene Buckalew	EI Examiner, Speech Language Pathologist

(10 items)

Susan Allen

Member Type: Enrolled Provider

Provider: Susan Allen

Phone: No Phone Numbers Found.

Specialty: Physical Therapist, EI Examiner

Agency Name: First Steps Pediatrics, LLC

Cancel

EI Team Meeting Attendees page (details view)

View the following information in this section as necessary:

- In **Member Type** , view whether the team member is an **Enrolled Provider, and Unenrolled Member**, or a **SPOE Contractor**.

For enrolled providers, view the following information as necessary:

- **Provider** displays the name of the service provider.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **Specialty** displays the individual's specialty.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **EI Team Role**, view the person's role on the team.
  - **Service Coordinator** indicates whether the provider is the team's service coordinator.
  - **Other** indicates whether provider has an additional role other than the team's service coordinator. When **Other** is specified, the **Other** field is available.

For unenrolled members, view the following information as necessary:

- **First Name** displays the person's first name.
- **Last Name** displays the person's last name.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **Specialty** displays the individual's specialty.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **EI Team Role**, view the person's role on the team.
  - **Service Coordinator** indicates whether the provider is the team's service coordinator.
  - **Other** indicates whether provider has an additional role other than the team's service coordinator. When **Other** is specified, the **Other** field is available.

For SPOE contractors, view the following information as necessary:

- In **Contractor**, view the name of the SPOE contractor.
- In **Start Date**, view the date on which the activity begins.
- **Specialty** displays the individual's specialty.
- **Agency Name** displays the name of the agency with which the person is associated (if applicable).
- In **EI Team Role**, view the person's role on the team.
    - **Service Coordinator** indicates whether the provider is the team's service coordinator.
    - **Other** indicates whether provider has an additional role other than the team's service coordinator. When **Other** is specified, the **Other** field is available.

5. Click the following command button(s) as necessary.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

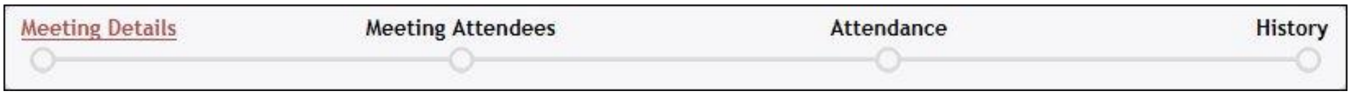
EI Team Meeting Attendance

This page allows you to view attendance information for an EI Team meeting.

To access this page, complete the following steps:

On the EI Team Meeting page:

- Click the **Attendance** link on the selection bar.



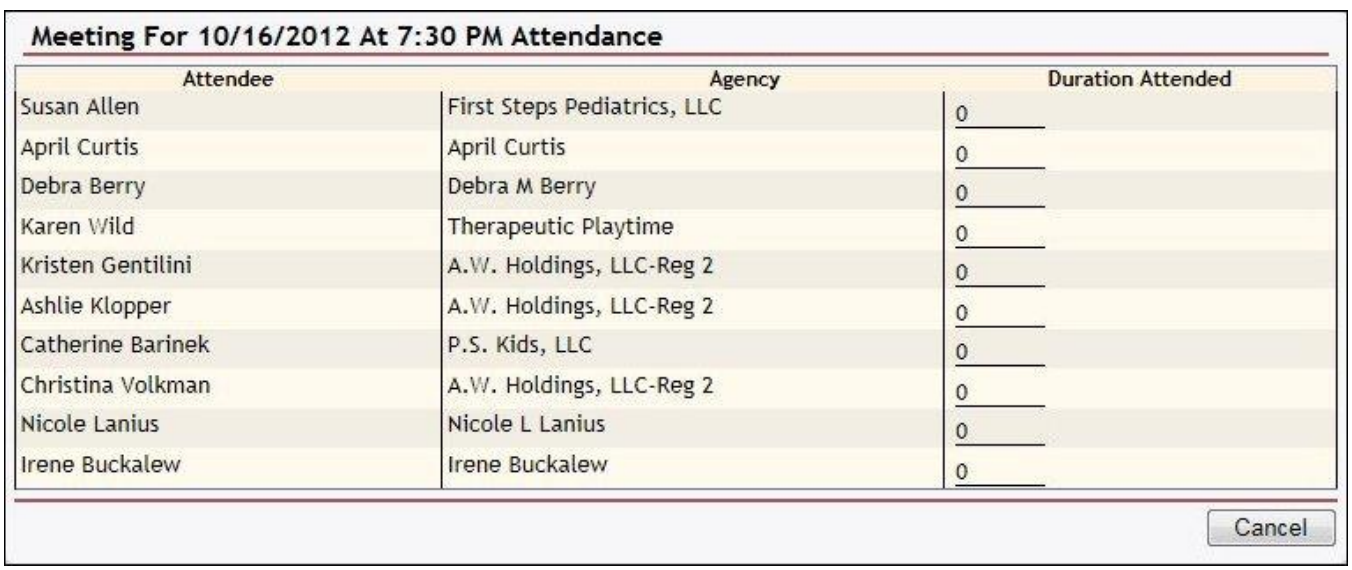
EI Team Meeting page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Meeting Details** link to display the EI Team Meeting page.
- Click the **Meeting Attendees** link to display the EI Team Meeting Attendees page.
- Click the **Attendance** link to display the EI Team Meeting Attendance page.
- Click the **History** link to display the EI Team Meeting History page.

Complete the following steps to work with this page:

1. The **Meeting** section displays a list of all team members who were scheduled to attend the EI Team meeting.



Meeting For 10/16/2012 At 7:30 PM Attendance

Attendee	Agency	Duration Attended
Susan Allen	First Steps Pediatrics, LLC	0
April Curtis	April Curtis	0
Debra Berry	Debra M Berry	0
Karen Wild	Therapeutic Playtime	0
Kristen Gentilini	A.W. Holdings, LLC-Reg 2	0
Ashlie Klopper	A.W. Holdings, LLC-Reg 2	0
Catherine Barinek	P.S. Kids, LLC	0
Christina Volkman	A.W. Holdings, LLC-Reg 2	0
Nicole Lanius	Nicole L Lanius	0
Irene Buckalew	Irene Buckalew	0

Cancel

EI Team Meeting Attendance page (default view)

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Attendee** displays the first and last name of the provider.
   - **Agency** displays the name of the agency with which the person is associated (if applicable).
   - In **Duration Attended**, view the time in minutes that the provider attended the meeting, if applicable.

3. Click the following command button(s) as necessary.
    - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

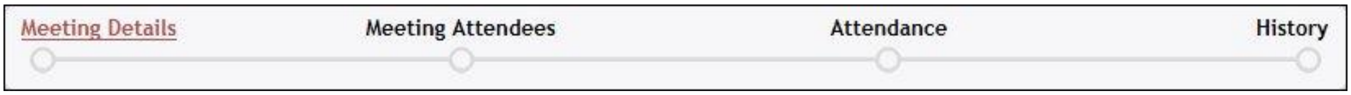
EI Team Meeting History

This page allows you to view a list of historical records for an EI Team meeting.

To access this page, complete the following steps:

On the EI Team Meeting page:

- Click the **History** link on the selection bar.



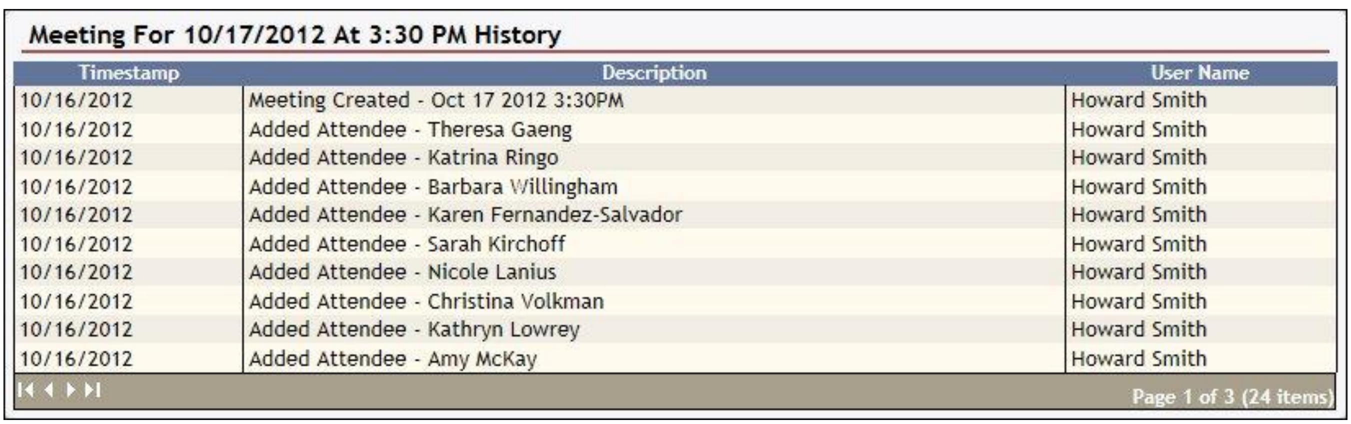
EI Team Meeting page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Meeting Details** link to display the EI Team Meeting page.
- Click the **Meeting Attendees** link to display the EI Team Meeting Attendees page.
- Click the **Attendance** link to display the EI Team Meeting Attendance page.
- Click the **History** link to display the EI Team Meeting History page.

Complete the following steps to work with this page:

1. The **EI Team Meeting History** section displays a list of historical records for the EI Team meeting.



Meeting For 10/17/2012 At 3:30 PM History

Timestamp	Description	User Name
10/16/2012	Meeting Created - Oct 17 2012 3:30PM	Howard Smith
10/16/2012	Added Attendee - Theresa Gaeng	Howard Smith
10/16/2012	Added Attendee - Katrina Ringo	Howard Smith
10/16/2012	Added Attendee - Barbara Willingham	Howard Smith
10/16/2012	Added Attendee - Karen Fernandez-Salvador	Howard Smith
10/16/2012	Added Attendee - Sarah Kirchoff	Howard Smith
10/16/2012	Added Attendee - Nicole Lanius	Howard Smith
10/16/2012	Added Attendee - Christina Volkman	Howard Smith
10/16/2012	Added Attendee - Kathryn Lowrey	Howard Smith
10/16/2012	Added Attendee - Amy McKay	Howard Smith

Page 1 of 3 (24 items)

EI Team Meeting History page (default view)

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Timestamp** displays the date and time at which the historical record was created.
   - **Description** displays additional descriptive information.
   - **User Name** displays the name of the user who created the historical record.

Meeting Calendar

EI Team Meeting Calendar

This page allows you to view the EI Team meetings scheduled.

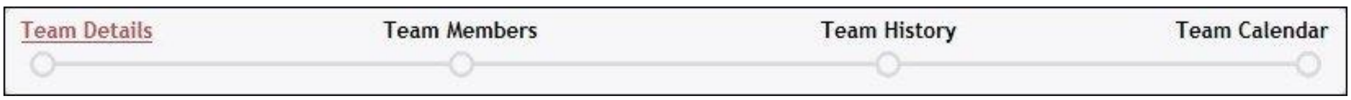
To access this page, complete the following steps:

On the main menu bar:

- On the **EI Team** menu, select the **Meeting Calendar** menu option.

On the EI Teams page:

- Double-click on a record in the table. The EI Teams selection bar displays.
- Click the **Team Calendar** link on the selection bar.



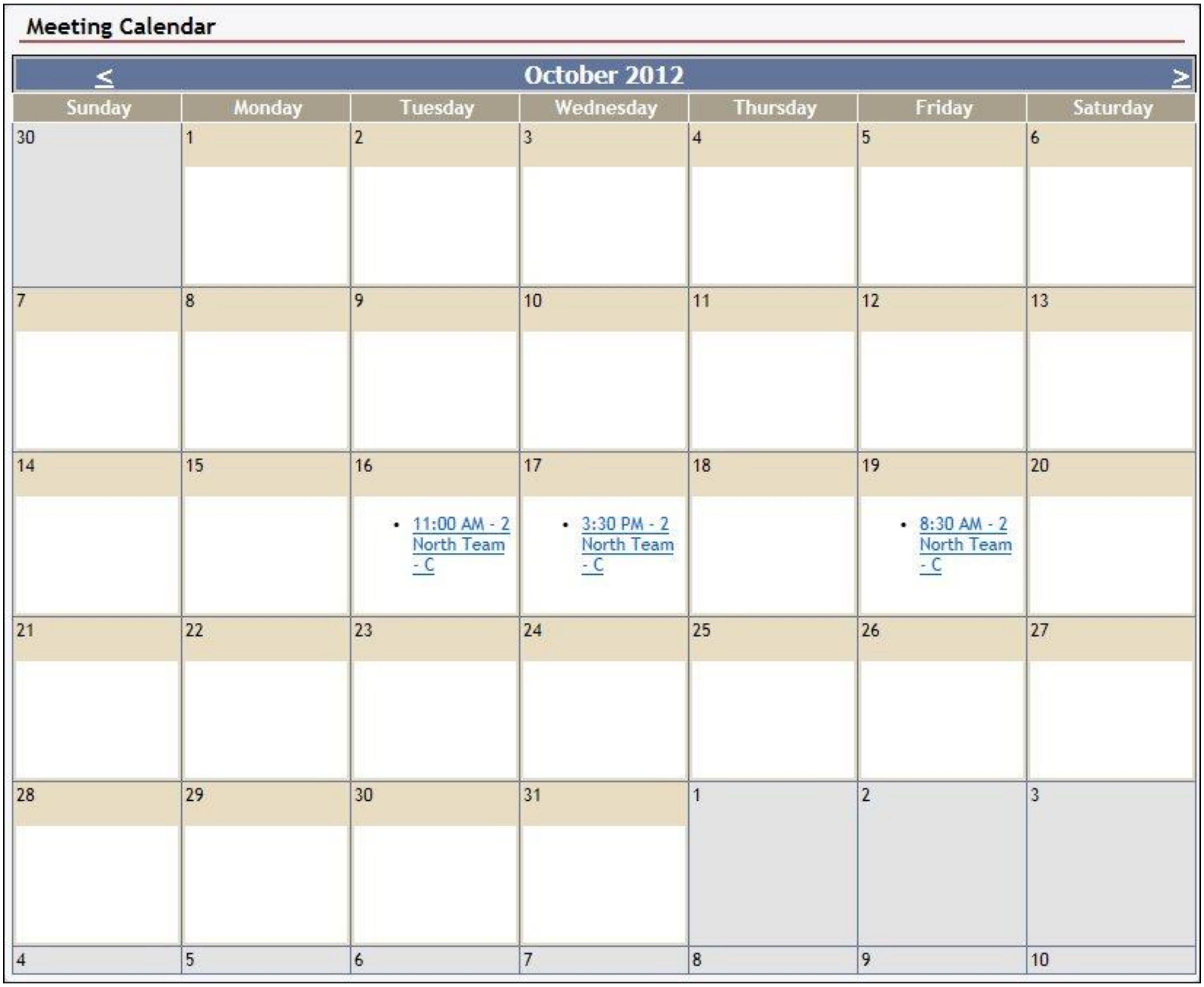
EI Teams page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Team Details** link to display the EI Teams page.
- Click the **Team Members** link to display the EI Team Members page.
- Click the **Team History** link to display the EI Team History page.
- Click the **Team Calendar** link to display the EI Team Meeting Calendar page.

Complete the following steps to work with this page:

1. The **Meeting Calendar** section displays meetings currently scheduled for EI teams and defaults to the current month.



EI Team Meeting Calendar page (default view)

2. Click an EI Team link on the calendar to display the EI Team Meeting page for the EI Team selected.

Provider Account Management

Billing Entity Detail

Use this page to view detailed information about a billing entity.

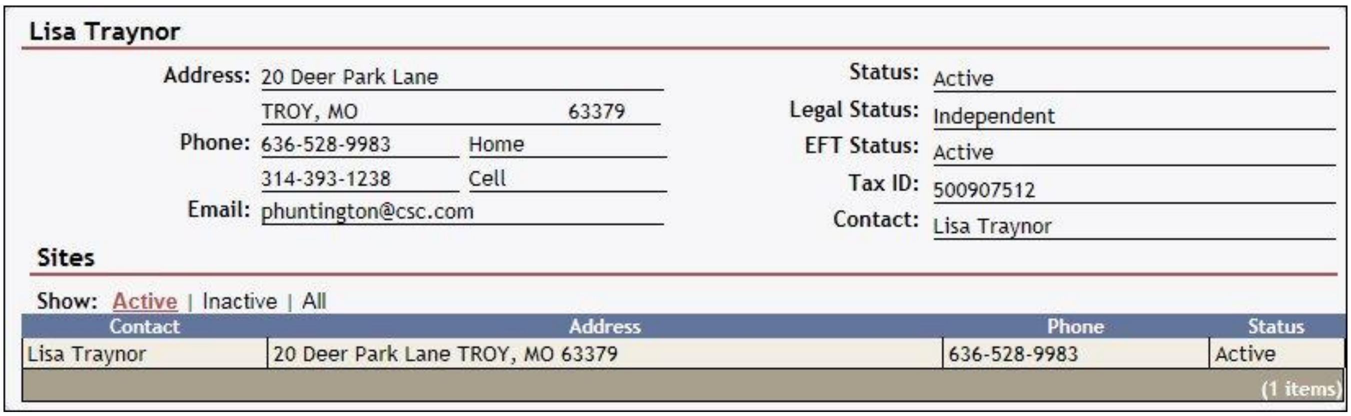
To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Billing Detail** menu option.

Complete the following steps to work with this page:

1. The **Billing Entity** section displays detailed information about the billing entity.



Billing Entity Detail page (default view)

View the following information in this section as necessary:

- The name of the billing entity displays in the heading of this section.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Email** displays the individual's electronic mail address.
- **Status** indicates whether the billing entity is currently active or inactive.
- **Legal Status** indicates whether the billing entity is currently enrolled as an Independent or an Agency.
- **EFT Status** indicates whether the billing entity's EFT status is currently Active or Inactive.
- **Tax ID** displays the tax identification number for the billing entity.
- **Contact** displays the first and last name of the contact person.

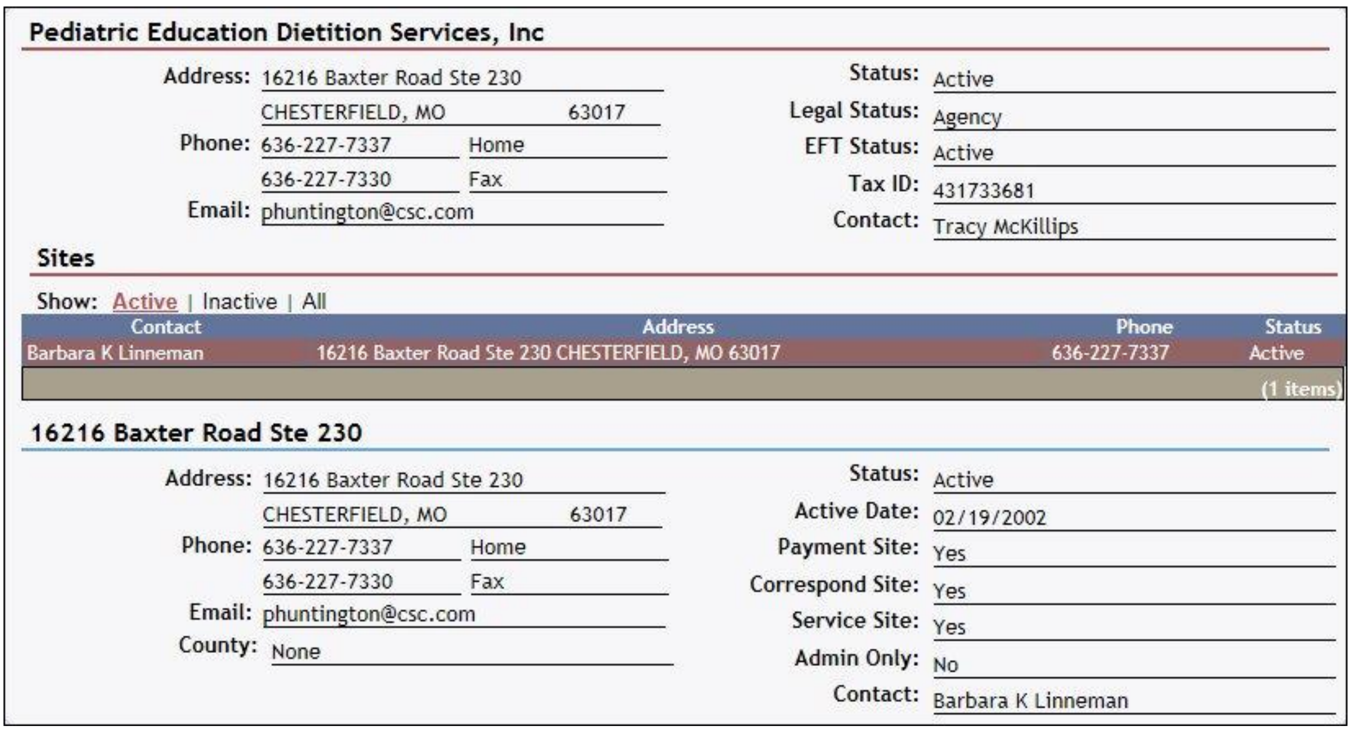
2. The **Sites** section displays a list of sites associated with the billing entity. The table contains a record for each site at which the billing entity operates (or operated).

Click the following links below the section heading to filter the list of records displayed in the table:

- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Contact** displays the first and last name of the contact person.
   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Status** indicates whether the individual is currently active or inactive.
4. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Billing Entity Detail page (site details view)

5. The **Site** section displays detailed information about the site.

   View the following information in this section as necessary:
   - The street address of the site displays in the heading of this section.
   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
   - **Email** displays the individual's electronic mail address.
   - **County** displays the name of the county in which the person resides (or practices).
   - **Status** indicates whether the individual is currently active or inactive.
   - **Active** displays the date range for which the person was associated with the child record.
   - **Payment Site** indicates whether this site is currently designated as a payment site for a provider.
   - **Correspond Site** indicates whether this site is currently designated as a correspondence site for a provider.
   - **Service Site** indicates whether this site is currently designated as a service site for a provider.

- **Admin Only** indicates whether this site is currently designated as an administrative-only site for a provider.
- **Contact** displays the first and last name of the contact person.

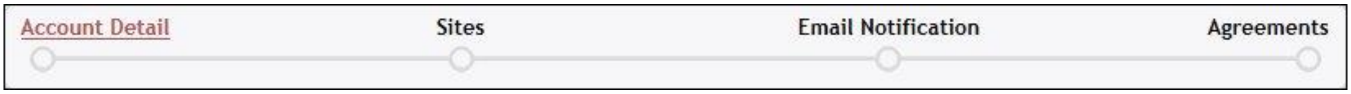
Provider Account Detail

Use this page to view and/or update specific and detailed information about a provider account.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Account Detail** menu option.



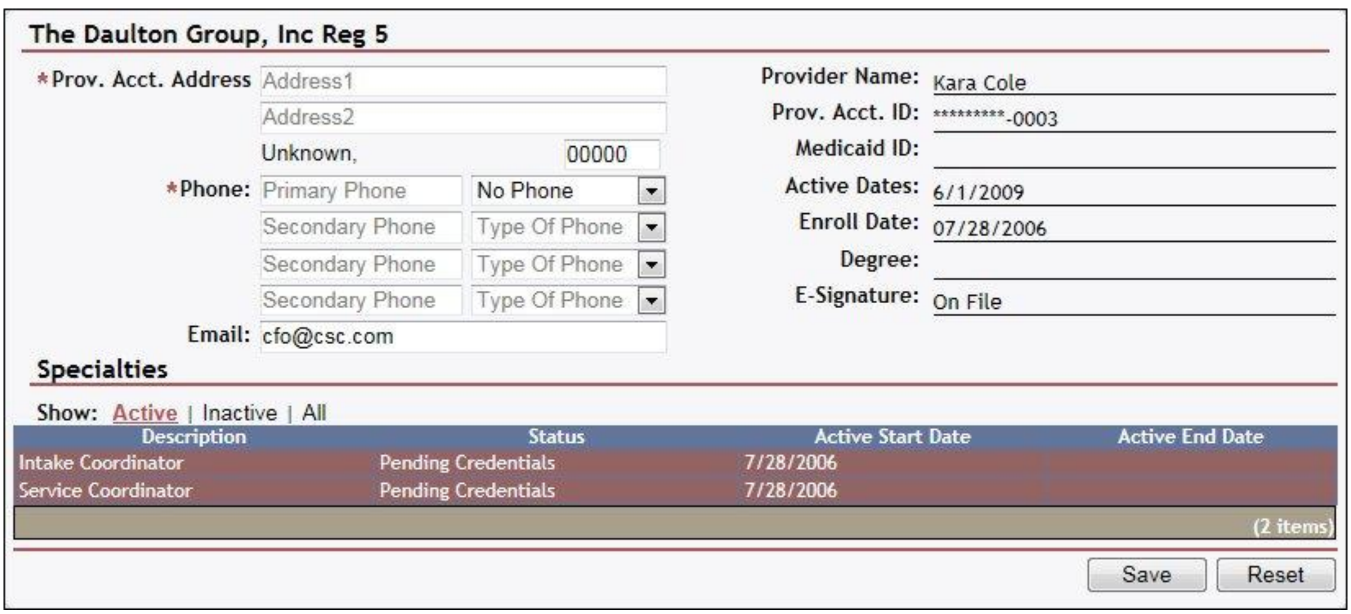
Provider Account Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Account Detail** link to display the Provider Account Detail page.
- Click the **Sites** link to display the Sites page.
- Click the **Email Notification** link to display the Email Notification page.
- Click the **Agreements** link to display the Agreements page.

Complete the following steps to work with this page:

1. The **Provider Account** section displays detailed information about the provider account.



Provider Account Detail page (default view)

View or update the following information in this section as necessary:

- The name of the provider account is displayed in the heading of this section.
- In **Prov. Acct. Address**, view or update the current address information for the provider.

- In **ZIP**, enter the complete five-digit ZIP code in which the residence (or office) is located. Once entered, the name of the city and the two-character state abbreviation associated with the ZIP code are displayed.
- In **Phone**, enter one or more telephone numbers at which the person can be contacted. For more information about entering telephone numbers, see the Telephone Numbers topic.
- In **Email**, enter the electronic mail address for the person. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
- **Provider Name** displays the name of the service provider.
- **Provider Account ID** displays the provider's identification number.
- **Medicaid ID** displays the provider's individual Medicaid identification number (if the provider is enrolled with Medicaid).
- **Active Dates** displays the date(s) on which the provider became (or becomes) active.
- **Enroll Date** displays the date on which the provider enrolled with the CFO.
- **Degree** displays the provider's degree.
- **E-Signature** indicates whether the provider's electronic signature is currently on file with the CFO.

2. The **Specialties** section displays a list of the provider's specialties.

   Click the following links below the section heading to filter the list of records displayed in the table:

   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Description** displays additional descriptive information.
   - **Status** indicates whether the individual is currently active or inactive.
   - **Active Start Date** displays the date on which the item becomes (or became) effective for the provider.
   - **Active End Date** displays the date through which the item remains effective for the provider.
4. Click the following command button(s) as necessary.
   - Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
   - Click the **Reset** button to discard any changes, reset all of the date to its last saved date, and continue working on this page.

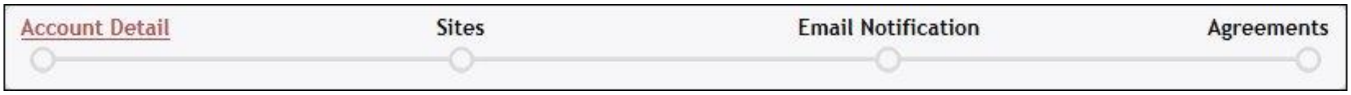
Sites

Use this page to view specific and detailed information about a provider account's site.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Account Detail** menu option. The Provider Account Detail page displays.
- Click the **Sites** link on the selection bar.



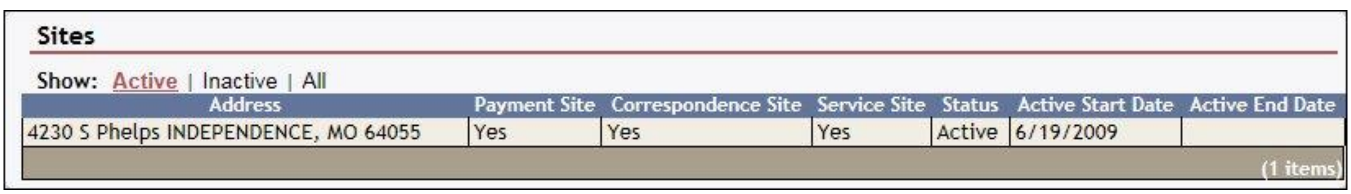
Provider Account Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Account Detail** link to display the Provider Account Detail page.
- Click the **Sites** link to display the Sites page.
- Click the **Email Notification** link to display the Email Notification page.
- Click the **Agreements** link to display the Agreements page.

Complete the following steps to work with this page:

1. The **Sites** section displays a list of sites associated with the provider. The table contains a record for each site at which the provider operates (or operated).



Sites

Show: Active | Inactive | All

Address	Payment Site	Correspondence Site	Service Site	Status	Active Start Date	Active End Date
4230 S Phelps INDEPENDENCE, MO 64055	Yes	Yes	Yes	Active	6/19/2009	

(1 items)

Sites page (default view)

Click the following links below the section heading to filter the list of records displayed in the table:

- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.
- Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Payment Site** indicates whether this site is currently designated as a payment site for a provider.
- **Correspond Site** indicates whether this site is currently designated as a correspondence site for a provider.

- **Service Site** indicates whether this site is currently designated as a service site for a provider.
- **Status** indicates whether the individual is currently active or inactive.
- **Active Start Date** displays the date on which the item becomes (or became) effective for the provider.
- **Active End Date** displays the date through which the item remains effective for the provider.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.

Sites page (details view)

3. The **Site** section displays detailed information about the site.

View the following information in this section as necessary:

- The street address of the site displays in the heading of this section.
- **Description** displays additional descriptive information.
- **Address** displays the street address, city, two-letter state abbreviation, and zip code.
- **Phone** displays the telephone number(s) at which the person (or primary contact) can be contacted.
- **Email** displays the individual's electronic mail address.
- **County** displays the name of the county in which the person resides (or practices).
- **Status** indicates whether the individual is currently active or inactive.
- **Active** displays the date range for which the person was associated with the child record.
- **Payment Site** indicates whether this site is currently designated as a payment site for a provider.
- **Correspond Site** indicates whether this site is currently designated as a correspondence site for a provider.
- **Service Site** indicates whether this site is currently designated as a service site for a provider.
- **Admin Only** indicates whether this site is currently designated as an administrative-only site for a provider.
- **Contact** displays the first and last name of the contact person.

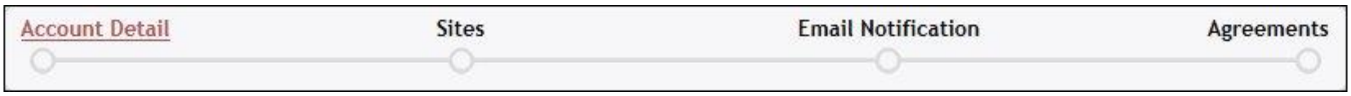
Email Notification

Use this page to view and/or update a provider's email notification triggers.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Account Detail** menu option. The Provider Account Detail page displays.
- Click the **Email Notification** link on the selection bar.



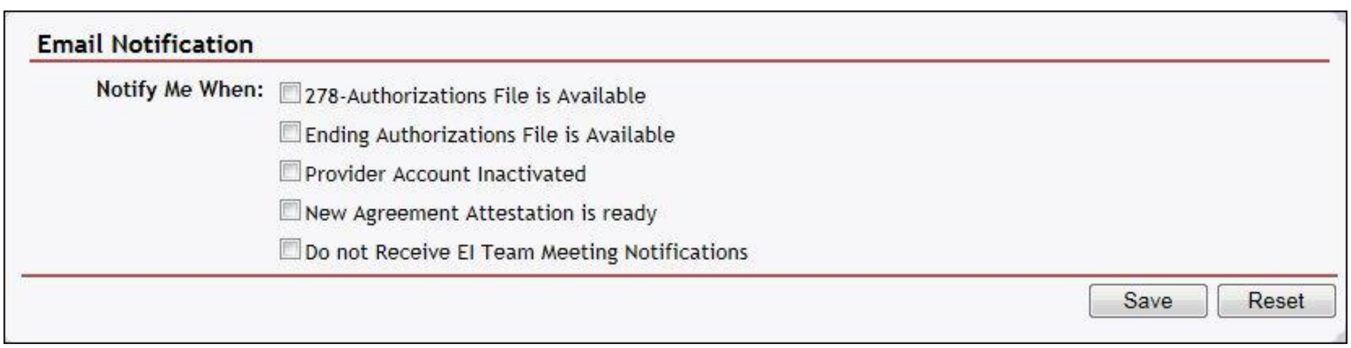
Provider Account Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Account Detail** link to display the Provider Account Detail page.
- Click the **Sites** link to display the Sites page.
- Click the **Email Notification** link to display the Email Notification page.
- Click the **Agreements** link to display the Agreements page.

Complete the following steps to work with this page:

1. The **Email Notifications** section displays email notification settings for the provider.



Email Notification page (default view)

2. View or update the following check box selections for the provider as necessary:
   - Select the **278-Authorization File is Available** check box to send email notifications when the authorization file is available. This email notification is only available if the provider has signed up for electronic billing.
   - Select the **Ending Authorizations File is Available** check box to send email notifications when the authorization file is available.
   - Select the **Provider Account Inactivated** check box to send email notifications when the provider account is inactivated.
   - Select the **New Agreement Attestation is ready** check box to send email notifications when the new agreement attestation is available.

- Select the **Do not Receive EI Team Meeting Notifications** check box if email notifications should not be sent for EI Team Meetings.

> **NOTE:** Email notifications are sent to the email address listed on the Provider Account Detail page. If an email notification is selected and a corresponding email address does not exist, an email notification is not sent.

3. Click the following command button(s) as necessary.
   - Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
   - Click the **Reset** button to discard any changes, reset all of the date to its last saved date, and continue working on this page.

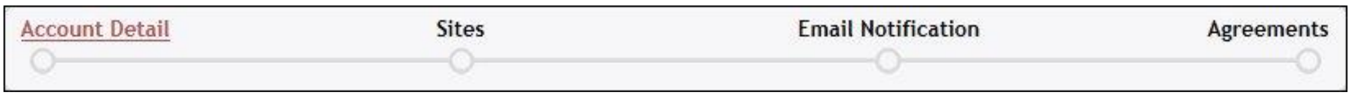
Agreements

Use this page to view and/or update the agreements required between the provider and the CFO for the enrollment of the provider account.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Account Detail** menu option. The Provider Account Detail page displays.
- Click the **Agreements** link on the selection bar.



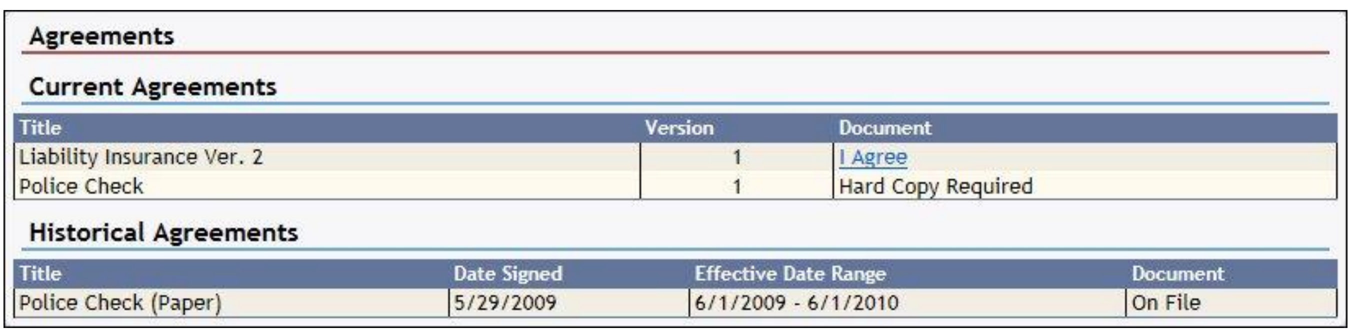
Provider Account Detail page (selection bar)

NOTE: A selection bar (pictured above) is available at the top of the page. Click the following links on the selection bar to view additional information as necessary:

- Click the **Account Detail** link to display the Provider Account Detail page.
- Click the **Sites** link to display the Sites page.
- Click the **Email Notification** link to display the Email Notification page.
- Click the **Agreements** link to display the Agreements page.

Complete the following steps to work with this page:

1. The **Current Agreements** section displays the current agreements with the provider.



Agreements

Current Agreements

Title	Version	Document
Liability Insurance Ver. 2	1	I Agree
Police Check	1	Hard Copy Required

Historical Agreements

Title	Date Signed	Effective Date Range	Document
Police Check (Paper)	5/29/2009	6/1/2009 - 6/1/2010	On File

Agreements page (default view)

2. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Title** displays the title of the document.
   - **Version** displays the version number of the document.
   - **Document** displays the actions needed to complete the agreement. When the **I Agree** link is available, click the link to complete the agreement. When clicked, the agreement document is downloaded to your local workstation as a PDF file and the I Agree page displays.
3. Click the **I Agree** link for each available document to complete the agreement(s). The I Agree page displays when clicked.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.
>
> When the **I Agree** link is clicked, a PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to the help system for your browser and/or operating system.
>
> Once a document has been "agreed to", the document is moved to the **Historical Agreements** table.

4. The **Historical Agreements** section displays past agreements with the provider.
5. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Title** displays the title of the document.
   - **Version** displays the version number of the document.
   - **Date Signed** displays the date on which the agreement occurred.
   - **Effective Date Range** displays the date range during which the agreement is (or was) active.
   - **Document** displays the agreements that occurred historically for the document. When the **View Document** link is available, you can click the link to download to your local workstation as a PDF file for review purposes.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

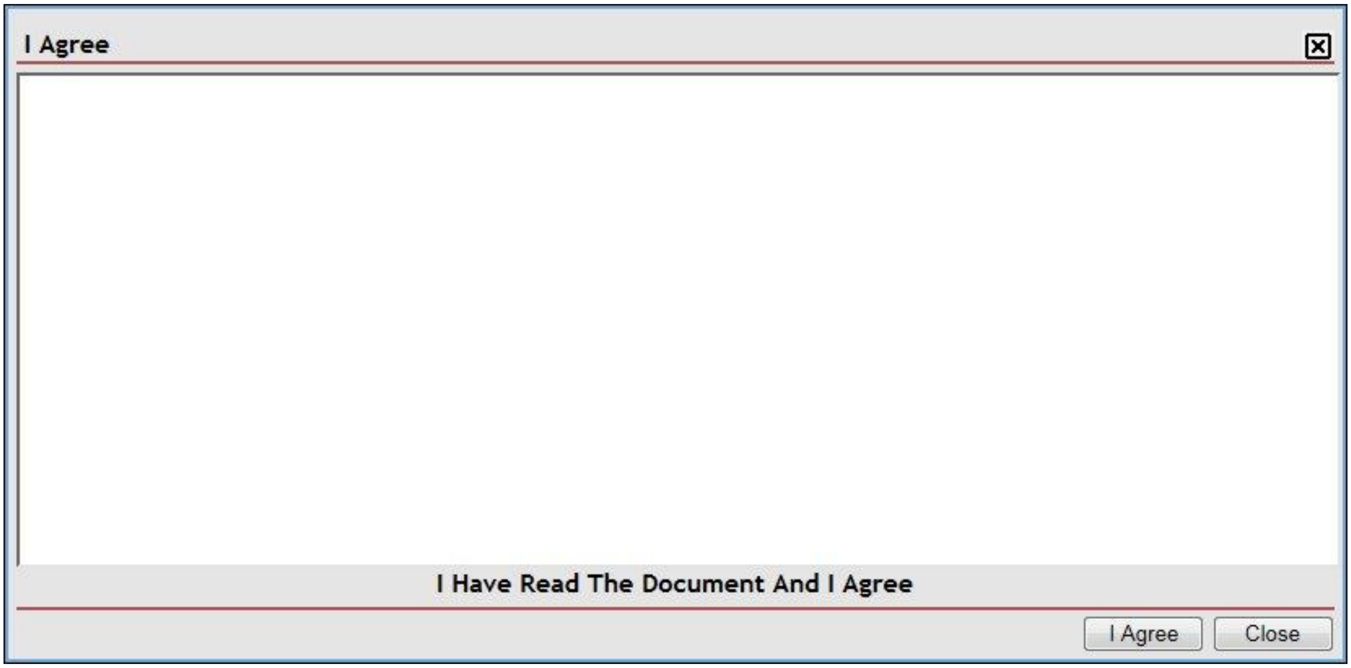
I Agree

Use this page to acknowledge agreement to state-required agreement documents online.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Account Detail** menu option. The Provider Account Detail page displays.
- Click the **Agreements** link on the selection bar. The Agreements page displays.
- Click the the **I Agree** link in the **Current Agreements** table.



I Agree page (default view)

Complete the following steps to work with this page:

1. When the **I Agree** link is clicked on the Agreements page, a PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to the help system for your browser and/or operating system.
2. Once you have read the document, click the **I Agree** button to acknowledge that you have read the document and acknowledge agreement.

   OR

   Click the **Close** button to return to the Agreements page without acknowledging agreement.

NOTE: The PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to the help system for your browser and/or operating system.

Claim Detail

Use this page to view and/or print specific and detailed information about a claim, or to view historical information about a claim.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Claim Search** menu option. The Claim Search page displays.
- Search for a claim.
- Double-click on a record in the table.

Complete the following steps to work with this page:

1. The **Claim History** section displays a historical list of records for the claim.

Claim History

Claim Number	Child Name	Child ID	Date Of Birth	Amount Billed	Updated Date	Paid Date
120322-304-2	Deep-carrot-orange value	390015328	3/10/2009	71.91	3/27/2012	4/5/2012
						(1 items)

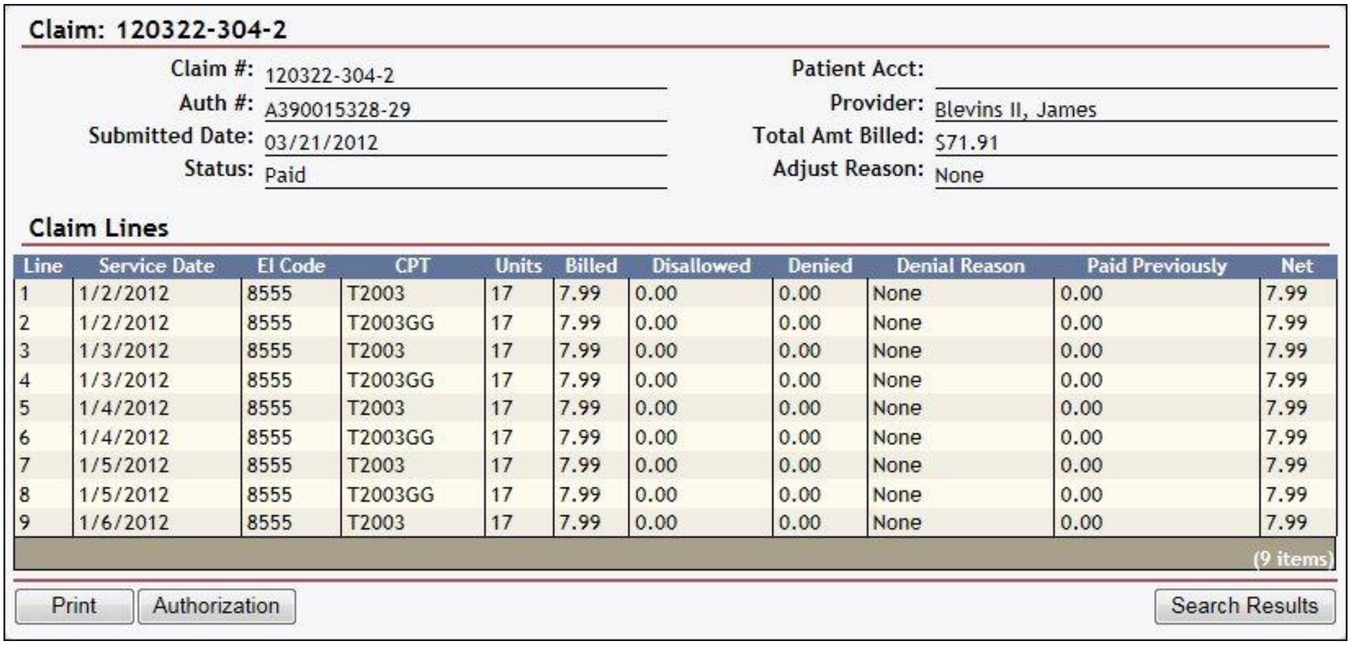
Claim History page (default view)

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Claim Number/Claim #** displays the identification number for reference.
- **Child Name** displays the child's first and last name.
- **Child ID** displays the child's unique identification number.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Amount Billed** displays the total amount billed for the claim.
- **Paid Date** displays the date on which the claim was paid. This column is blank for claims that have no statement date and have not yet been paid.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. The **Claim** section displays detailed information about the claim.



Claim: 120322-304-2

Claim #:	120322-304-2	Patient Acct:	
Auth #:	A390015328-29	Provider:	Blevins II, James
Submitted Date:	03/21/2012	Total Amt Billed:	$71.91
Status:	Paid	Adjust Reason:	None

Claim Lines

Line	Service Date	EI Code	CPT	Units	Billed	Disallowed	Denied	Denial Reason	Paid Previously	Net
1	1/2/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
2	1/2/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
3	1/3/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
4	1/3/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
5	1/4/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
6	1/4/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
7	1/5/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
8	1/5/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
9	1/6/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99

(9 items)

Print | Authorization | Search Results

Claim Detail page (default view)

View the following information in this section as necessary:

- **Claim Number/Claim #** displays the identification number for reference.
- **Authorization #/Auth #** displays the identification number for the authorization.
- **Submitted Date** displays the date on which the claim was entered into the database (or the date on which the claim was received in EIX).
- **Status** displays the current status of the activity.
- **Patient Acct #** displays the providers patient account number.
- **Provider** displays the name of the service provider.
- **Total Amt Billed** displays the total amount billed for the claim.
- **Adjust Reason** displays the reason for which the claim was adjusted, if applicable.
- **Resubmitted Reason** displays the reason for which the claim was resubmitted, if applicable.

3. The **Claim Lines** section displays detailed information about the lines on the claim.

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Line #** displays the item number for the line item.
- **Service Date** displays the date the service is or was provided.
- **EI Code** displays the EI identification number.
- **CPT** displays the CPT code for the line item.
- **Units** displays the number of units for which the provider is billing. 1 unit equals 15 minutes of service time.
- **Billed** displays the dollar amount charged for the claim line item.
- **Disallowed** displays the dollar amount disallowed for the claim line item.
- **Denied** displays the dollar amount denied for the claim line item.
- **Denial Reason** displays the reason why the claim line item was denied.
- **Paid Previously** displays the dollar amount that was previously paid on the claim line item.
- **Net** displays the net amount paid for the claim line item.

4. Click the following command button(s) as necessary.

- Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
- Click the **Authorization** button to display the Authorization Detail page.
- Click the **Search Results** button to return and view the results of the most recent claim search on the Claim Search page.

Provider Communication Messages

Use this page to view a list of messages or notifications communicated to providers.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Provider Communication Messages** menu option.

Complete the following steps to perform this tutorial:

1. The **Messages** section displays a list of messages or notifications that were communicated to providers.

Messages

Subject	Effective Date	End Date
Proposed Changes to State Plan for Part C and Notice of Public Hearing - REMINDER	10/15/2012	
Timelines for Entering Progress Notes	10/15/2012	
Proposed Changes to State Plan for Part C and Notice of Public Hearings - REMINDER	10/9/2012	
ECSE/First Steps/Early Childhood Outcomes (ECO) Materials Available Online	10/9/2012	
Important: WebSPOE System Update on October 30, 2012	9/28/2012	
Important: Recommended Browsers in WebSPOE	9/25/2012	
Important: Upcoming WebSPOE Changes in October/November 2012	9/13/2012	
Proposed Changes to State Plan for Part C and Notice of Public Hearings	8/30/2012	
Updates to the WebSPOE	7/26/2012	
Autism Spectrum Disorders: Guide to Evidence-based Interventions	7/20/2012	

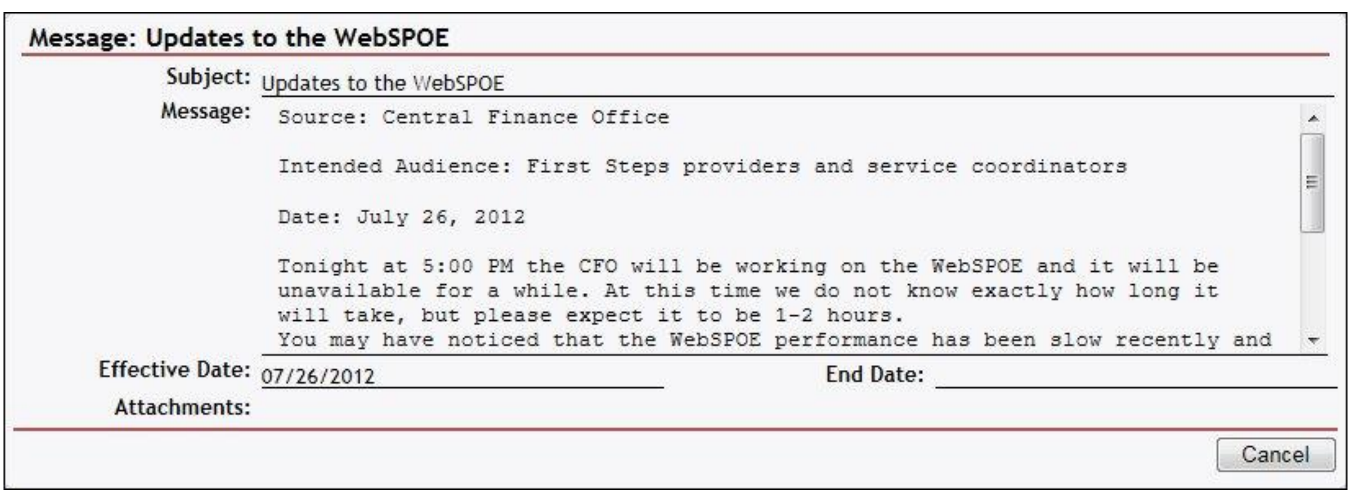
Page 1 of 12 (120 items)

Provider Communication Messages page (default view)

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Subject** displays the subject of (or reason for) the message or notification.
- **Effective Date** displays the date on which the item becomes (or became) active or assigned.
- **End Date** displays the date on which the activity is (or was) completed.

2. Double-click on a record in the table to view detailed information for the record selected. The page refreshes and detailed information displays below the table.



Message: Updates to the WebSPOE

Subject: Updates to the WebSPOE

Message:

Source: Central Finance Office

Intended Audience: First Steps providers and service coordinators

Date: July 26, 2012

Tonight at 5:00 PM the CFO will be working on the WebSPOE and it will be unavailable for a while. At this time we do not know exactly how long it will take, but please expect it to be 1-2 hours.
You may have noticed that the WebSPOE performance has been slow recently and

Effective Date: 07/26/2012 End Date:

Attachments:

Cancel

Provider Communication Messages page (default view)

3. The **Message** section displays the message details. View the following information in this section as necessary:
   - **Subject** displays the subject of (or reason for) the message or notification.
   - **Message** displays the descriptive text of the message or notification.
   - **Effective Date** displays the date on which the item becomes (or became) active or assigned.
   - **End Date** displays the date on which the activity is (or was) completed.
   - **Attachments** displays the file names and the three- or four-character file extensions for any files attached to the message or notification when it was sent.
4. Click the following command button(s) as necessary.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

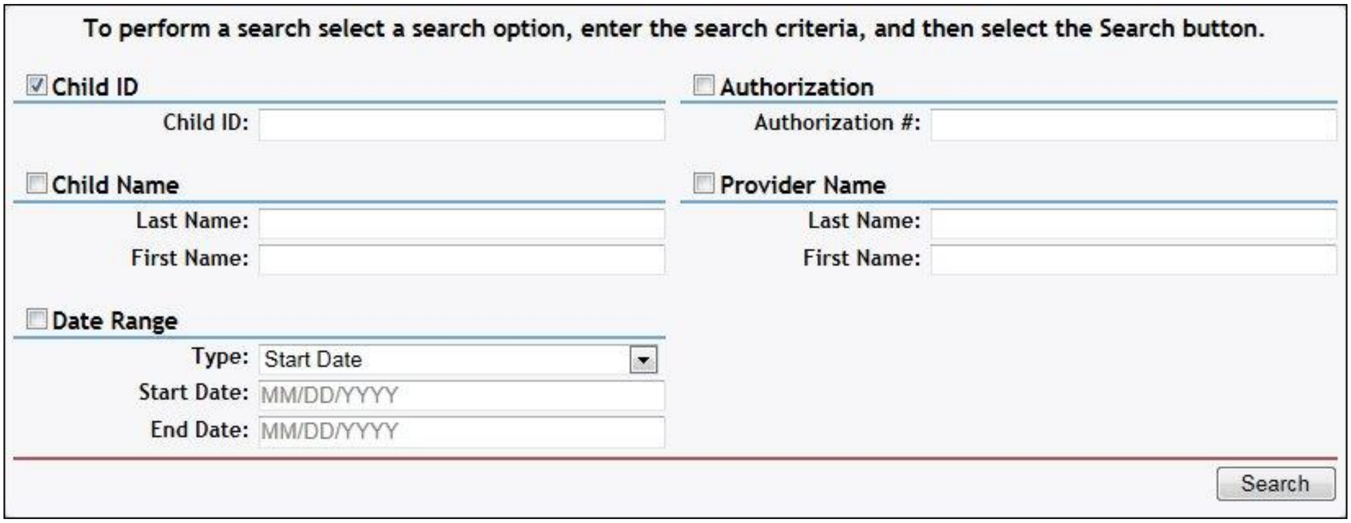
Authorization Search

Use this page to perform a search and filter the list of authorizations.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Authorization Search** menu option.



Authorization Search page (default view)

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

Complete the following steps to work with this page:

1. Select the appropriate check boxes and enter filter criteria in the following fields as necessary to perform a search:

   Child ID:

   - In **Child ID**, enter the unique identification number of the child on which to search. The complete nine-digit child identification number is required to perform a search on child ID.

   Child Name:

   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.

   Date Range:

   - In **Type**, select the type of date on which you want to search.
   - In **Start Date**, enter the starting date of the date range on which to search.
   - In **End Date**, enter the ending date of the date range on which to search.

Authorization:

- In **Authorization #**, enter the specific authorization identification number on which to search.

Provider Name:

- In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
- In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.

2. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.

Search Results

Show: Active | Inactive | All — Print

Auth Number	Service Type	Method / Location	Start Date	End Date	Child Name	Child ID	Date Of Birth	Status	Provider Name
A380015873 -3	Translation Services	Direct Child Service / Home	5/11/2012	10/19/2012	Medium-electric-blue weight	380015873	10/20/2009	Active	Greater St Louis Region, Spoe Provider

(1 items)

Authorization Search page (results found)

3. Filter the list of results displayed in the table as necessary by clicking the following links below the section heading:
   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Authorization #/Auth #** displays the identification number for the authorization.
   - **Service Type** displays the type of service provided.
   - **Method/Location** displays the selected method and location of the service or meeting.
   - **Start Date** displays the start date of the authorization.
   - **End Date** displays the end date of the authorization.
   - **Child Name** displays the child's first and last name.
   - **Child ID** displays the child's unique identification number.
   - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
   - **Status** displays the current status of the authorization.
   - **Provider Name** displays the name of the service provider.
5. Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
6. Double-click on a claim record in the table to display the Authorization Detail page.

Authorization Detail

Use this page to view and/or print specific and detailed information about an authorization.

To access this page, complete the following steps:

On the main menu bar:

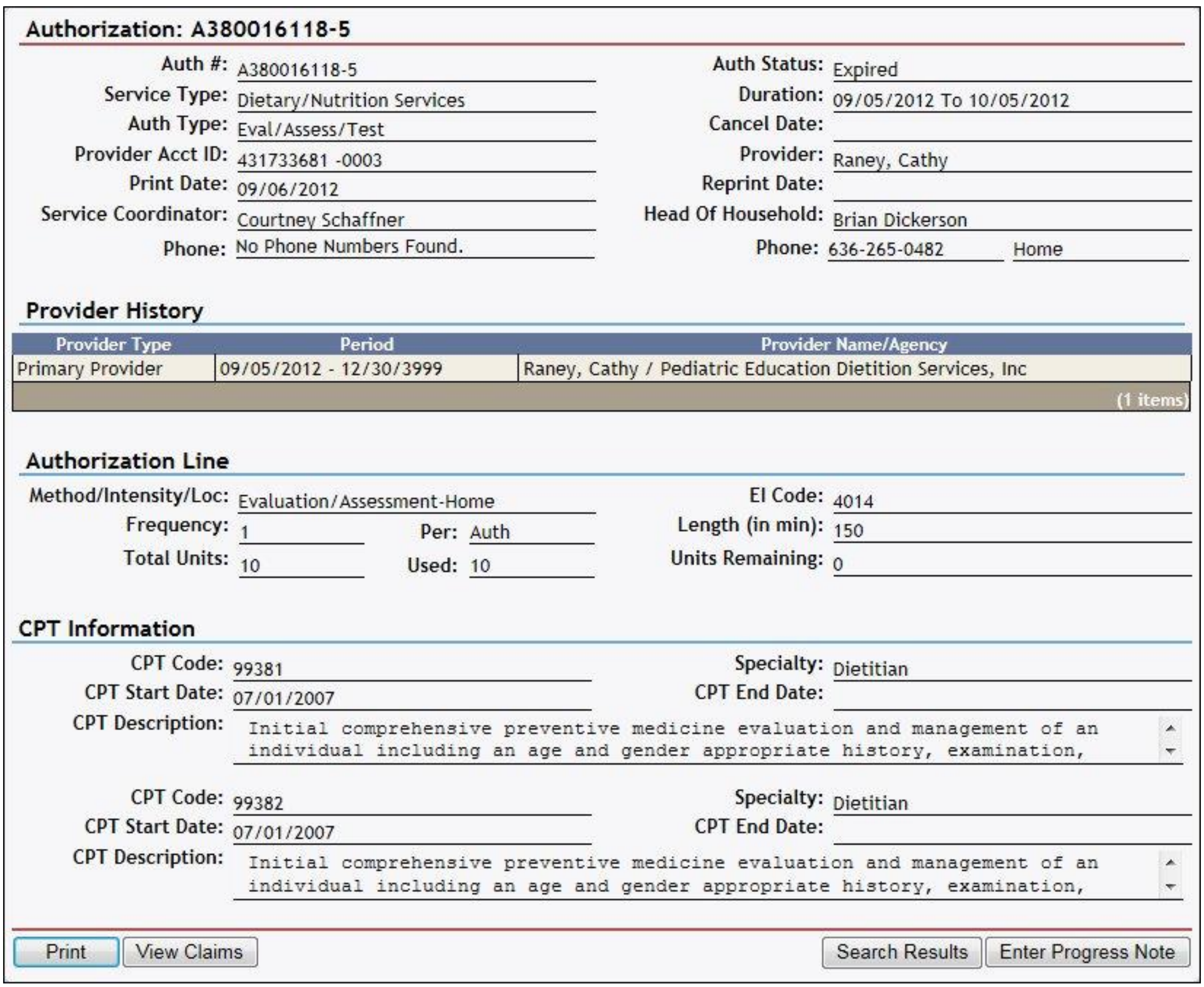
- On the **Provider Account Management** menu, select the **Authorization Search** menu option. The Authorization Search page displays.
- Search for an authorization.
- Double-click on a record in the table.

On the Claim Detail page:

- Click the **Authorization** button.

Complete the following steps to work with this page:

1. The **Authorization** section displays detailed information about the authorization.



Authorization Detail page (default view)

2. The **Provider History** section displays a historical list of records for the authorization's providers.

   View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

   - **Provider Type** displays the type of service provider.
   - **Period** displays the applicable date range.
   - **Provider Name/Agency** displays the name of the provider/agency associated with the authorization.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. The **Authorization Line** section displays detailed information about the lines on the claim.

   View the following information in this section as necessary:

   - **Method/Intensity/Loc** displays the selected method and location of the service or meeting.
   - **EI Code** displays the EI identification number.
   - **Frequency** displays the frequency of the activity.
   - **Per** defines the frequency of the activity.
   - **Length (in min)** defines the duration of the activity in minutes.
   - **Total Units** displays the total number of units for which the provider is billing. 1 unit equals 15 minutes of service time.
   - **Used** displays the units that have been claimed by the provider and paid.
   - **Units Remaining** displays the calculated difference between the units authorized and the units used.

4. The **CPT Information** section displays detailed CPT information for the authorization.

   View the following information in this section as necessary:

   - **CPT Code** displays the CPT code for the line item.
   - **CPT Description** displays a description of the CPT code for the line item.
   - **Specialty** displays the individual's specialty.
   - **CPT Start Date** displays the start date of the CPT code for the line item.
   - **CPT End Date** displays the end date of the CPT code for the line item.

5. Click the following command button(s) as necessary.

   - Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
   - Click the **View Claims** button to search for all claims associated with this authorization and display the results of the search on the Claim Search page.
   - Click the **Search Results** button to return and view the results of the most recent authorization search on the Authorization Search page.

     The **Search Results** button is only available when this page is accessed from the Authorization Search page.

Claim Search

Use this page to perform a search and filter the list of claims.

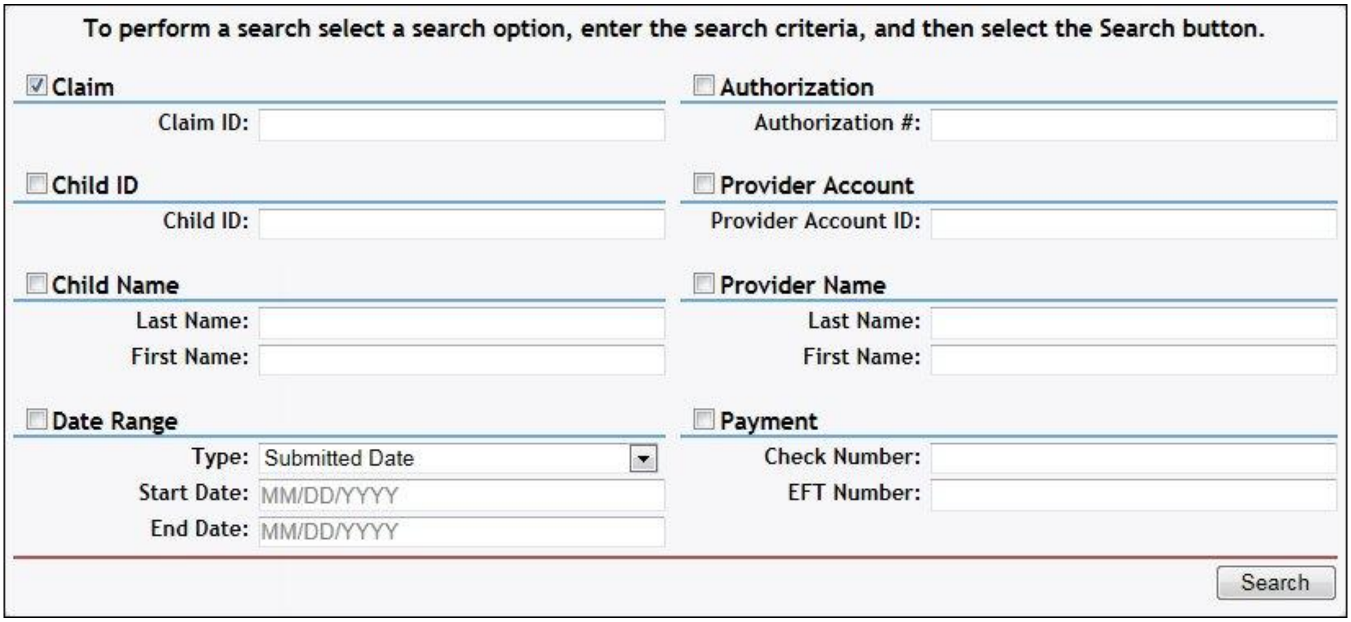
To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Claim Search** menu option.

On the Authorization Detail page:

- Click the **View Claims** button.



Claim Search page (default view)

NOTE: One or more of the fields on this page will allow the entry of partial information to help you narrow your search.

1. Select the appropriate check boxes and enter filter criteria in the following fields as necessary to perform a search:

   Claim ID:

   - In **Claim ID**, enter the specific claim identification number on which to search.

   Child ID:

   - In **Child ID**, enter the unique identification number of the child on which to search. The complete nine-digit child identification number is required to perform a search on child ID.

   Child Name:

   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.

Date Range:

- In **Type**, select the type of date on which you want to search.
- In **Start Date**, enter the starting date of the date range on which to search.
- In **End Date**, enter the ending date of the date range on which to search.

Authorization:

- In **Authorization #**, enter the specific authorization identification number on which to search.

Provider Account:

- In **Provider Account ID**, enter the specific provider account identification on which to search.

Provider Name:

- In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
- In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.

Payment:

- In **Check Number**, enter the specific payment reference number on which to search.
- In **EFT Number**, enter the specific payment reference number on which to search.

2. Click the **Search** button. The page refreshes and results found to match the search criteria display in the results table.

Search Results

Print

Claim Number	Child Name	Child Id	Date Of Birth	Amount Billed	Date Submitted	Provider Name
120322-304-2	Deep-carrot-orange value	390015328	3/10/2009	71.91	3/21/2012	Blevins II, James
120322-304-3	Deep-carrot-orange value	390015328	3/10/2009	71.91	3/21/2012	Blevins II, James

Page 1 of 2 (11 items)

Claim Search page (default view)

3. View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:
   - **Claim Number/Claim #** displays the identification number for reference.
   - **Child Name** displays the child's first and last name.
   - **Child ID** displays the child's unique identification number.
   - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
   - **Amount Billed** displays the total amount billed for the claim.
   - **Submitted Date** displays the date on which the claim was entered into the database (or the date on which the claim was received in EIX).
   - **Provider Name** displays the name of the service provider.

> **NOTE:** If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
5. Double-click on a claim record in the table to display the Claim Detail page.

Claim Detail

Use this page to view and/or print specific and detailed information about a claim, or to view historical information about a claim.

To access this page, complete the following steps:

On the main menu bar:

- On the **Provider Account Management** menu, select the **Claim Search** menu option. The Claim Search page displays.
- Search for a claim.
- Double-click on a record in the table.

Complete the following steps to work with this page:

1. The **Claim History** section displays a historical list of records for the claim.

Claim History

Claim Number	Child Name	Child ID	Date Of Birth	Amount Billed	Updated Date	Paid Date
120322-304-2	Deep-carrot-orange value	390015328	3/10/2009	71.91	3/27/2012	4/5/2012
						(1 items)

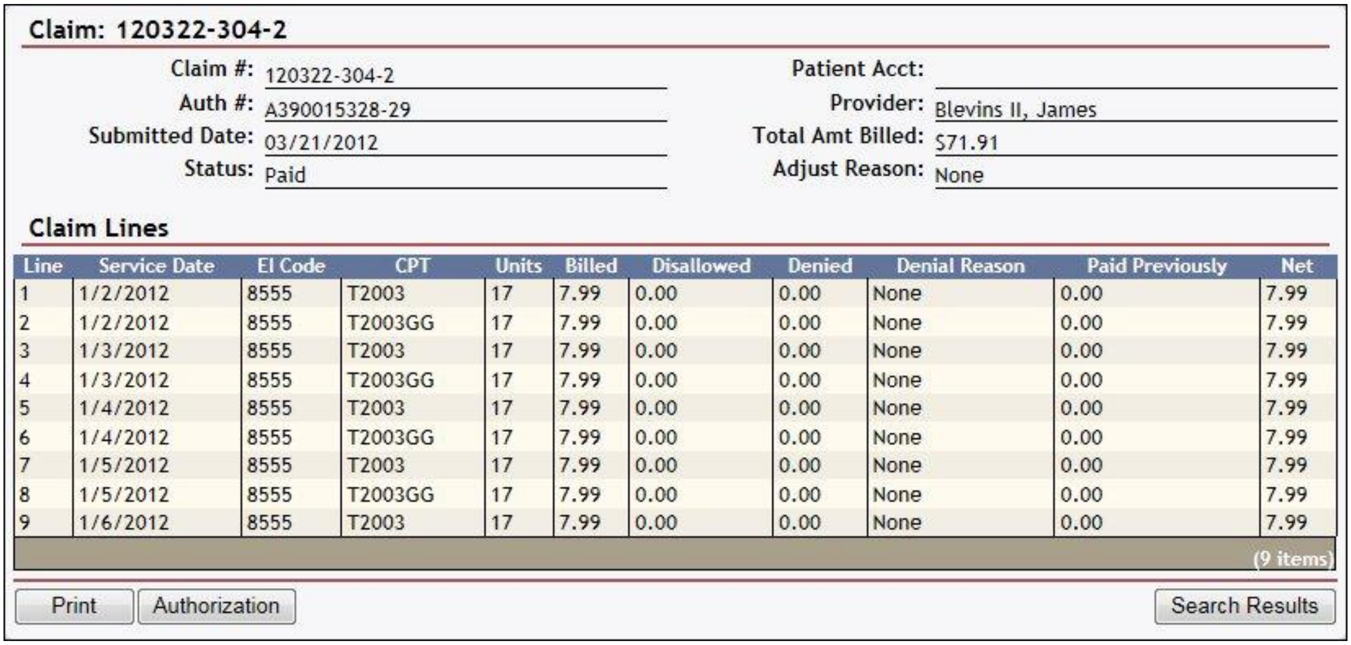
Claim History page (default view)

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Claim Number/Claim #** displays the identification number for reference.
- **Child Name** displays the child's first and last name.
- **Child ID** displays the child's unique identification number.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Amount Billed** displays the total amount billed for the claim.
- **Paid Date** displays the date on which the claim was paid. This column is blank for claims that have no statement date and have not yet been paid.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. The **Claim** section displays detailed information about the claim.



Claim: 120322-304-2

Claim #:	120322-304-2	Patient Acct:	
Auth #:	A390015328-29	Provider:	Blevins II, James
Submitted Date:	03/21/2012	Total Amt Billed:	$71.91
Status:	Paid	Adjust Reason:	None

Claim Lines

Line	Service Date	EI Code	CPT	Units	Billed	Disallowed	Denied	Denial Reason	Paid Previously	Net
1	1/2/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
2	1/2/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
3	1/3/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
4	1/3/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
5	1/4/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
6	1/4/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
7	1/5/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99
8	1/5/2012	8555	T2003GG	17	7.99	0.00	0.00	None	0.00	7.99
9	1/6/2012	8555	T2003	17	7.99	0.00	0.00	None	0.00	7.99

(9 items)

Print | Authorization | Search Results

Claim Detail page (default view)

View the following information in this section as necessary:

- **Claim Number/Claim #** displays the identification number for reference.
- **Authorization #/Auth #** displays the identification number for the authorization.
- **Submitted Date** displays the date on which the claim was entered into the database (or the date on which the claim was received in EIX).
- **Status** displays the current status of the activity.
- **Patient Acct #** displays the providers patient account number.
- **Provider** displays the name of the service provider.
- **Total Amt Billed** displays the total amount billed for the claim.
- **Adjust Reason** displays the reason for which the claim was adjusted, if applicable.
- **Resubmitted Reason** displays the reason for which the claim was resubmitted, if applicable.

3. The **Claim Lines** section displays detailed information about the lines on the claim.

View the list of records displayed in the table. Detailed information for each record available displays in the following column(s) of the table:

- **Line #** displays the item number for the line item.
- **Service Date** displays the date the service is or was provided.
- **EI Code** displays the EI identification number.
- **CPT** displays the CPT code for the line item.
- **Units** displays the number of units for which the provider is billing. 1 unit equals 15 minutes of service time.
- **Billed** displays the dollar amount charged for the claim line item.
- **Disallowed** displays the dollar amount disallowed for the claim line item.
- **Denied** displays the dollar amount denied for the claim line item.
- **Denial Reason** displays the reason why the claim line item was denied.
- **Paid Previously** displays the dollar amount that was previously paid on the claim line item.
- **Net** displays the net amount paid for the claim line item.

4. Click the following command button(s) as necessary.

- Click the **Print** button to generate a report. The Report Viewer page displays in a new browser window when clicked.
- Click the **Authorization** button to display the Authorization Detail page.
- Click the **Search Results** button to return and view the results of the most recent claim search on the Claim Search page.

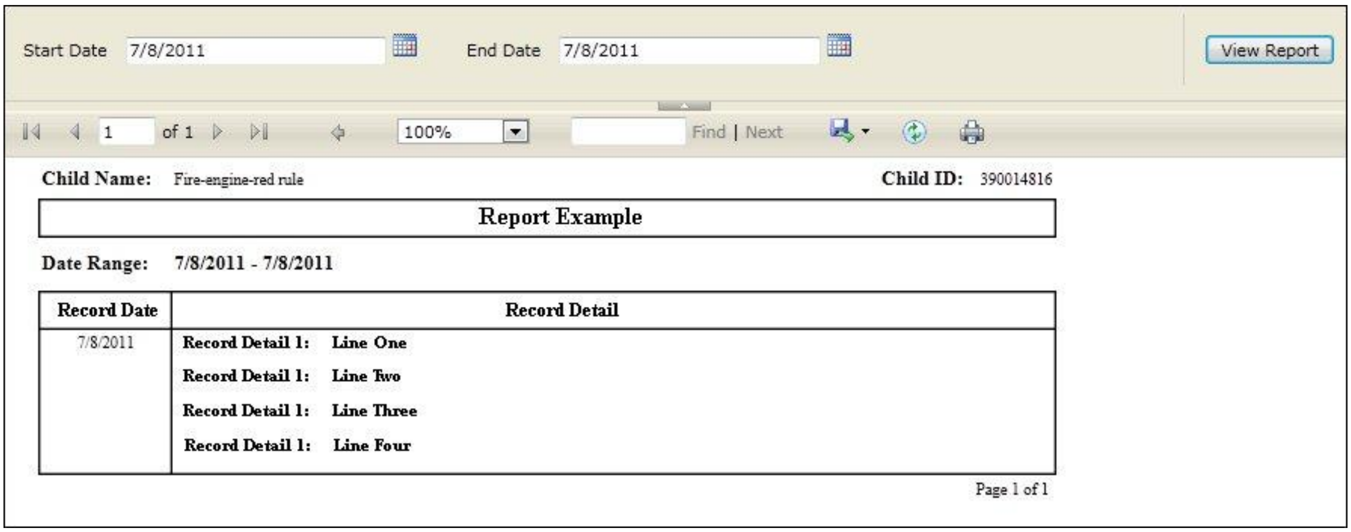
Reports

Report Viewer

Use this page to view and/or print a report.

To access this page, complete the following steps:

- This page displays as the result of invoking the report generation process on various pages throughout the application.



Report Viewer page (generic report view)

NOTE: Depending on the type of report generated, the Report Viewer displays differently and some functionality may be disabled or unavailable.

User Options

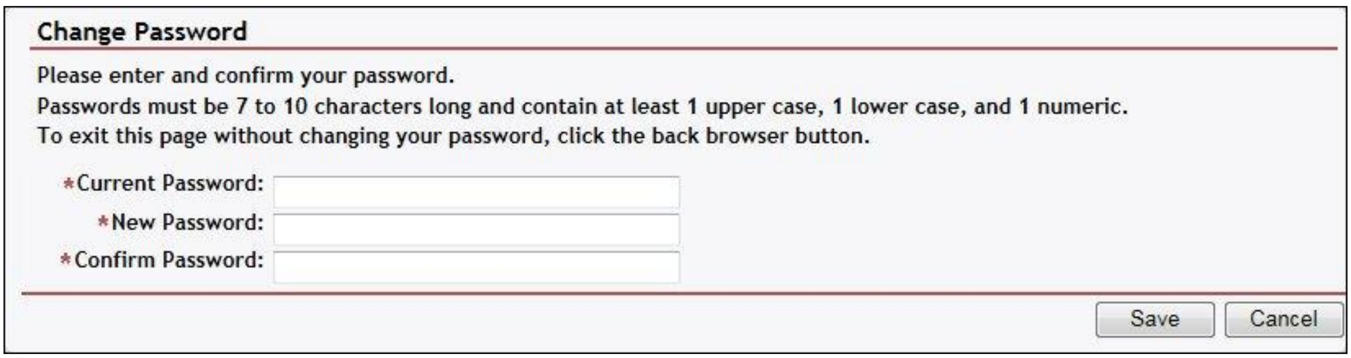
Change Password

Use this page to change your user password information.

To access this page, complete the following steps:

On the main menu bar:

- On the **User Options** menu, select the **Change Password** menu option.



Change Password

Please enter and confirm your password.

Passwords must be 7 to 10 characters long and contain at least 1 upper case, 1 lower case, and 1 numeric.

To exit this page without changing your password, click the back browser button.

*Current Password:

*New Password:

*Confirm Password:

Save Cancel

Change Password page (default view)

NOTE: Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page when attempting to save the data.

Complete the following steps to work with this page:

1. Enter the current and new password information in the following controls:
   - In **Current Password**, enter the password you currently use to sign on to the application.
   - In **New Password**, enter your new password. Passwords must be 7 to 10 characters long and must contain at least 1 upper case character, 1 lower case character, and 1 numeric character.
   - In **Confirm New Password**, enter your new password again for confirmation purposes.
2. Click the following command button(s) as necessary.
   - Click the **Save** button to save the information. The page refreshes when the button is clicked. If changes were saved, a confirmation message displays at the top of the page indicating that the data saved successfully.
   - Click the **Cancel** button to discard any changes without saving or to hide the details section on the page. The page refreshes when the button is clicked. If changes were discarded, a confirmation message displays at the top of the page indicating that the data was reset.

Appendix

Calendar Controls

In the Missouri First Steps application, calendar controls allow you to enter or select dates from a drop-down calendar. Click on a date field to display the drop-down calendar, and then click on a date to select it. You can navigate through the months using the arrow buttons at the top of the calendar.

The calendar control appears as a masked edit box. However, a one-month calendar displays when your cursor is placed in the masked edit box. The month that the calendar displays is determined by the contents of the masked edit box. If the box is empty, the current month displays. If the box contains a date, the specified month displays.

Calendar control (day view)

The left arrow **<** at the top-left corner of the calendar displays the previous month when clicked. The right arrow **>** at the top-right corner of the calendar displays the next month when clicked. Any day of the displayed calendar month can be selected by clicking it. Alternately, the current date can be selected by clicking the Today link at the bottom of the calendar.

Click the Month, Year link at the top of the calendar to display all months in the year. The left arrow **<** at the top-left corner of the calendar displays the previous year when clicked. The right arrow **>** at the top-right corner of the calendar displays the next year when clicked. Any month of the displayed calendar year can be selected by clicking it. Once selected, the day view will be displayed.

Calendar control (month view)

Click the Year link at the top of the calendar to display all years in the decade. The left arrow **<** at the top-left corner of the calendar displays the previous decade when clicked. The right arrow **>** at the top-right corner of the calendar displays the next decade when clicked. Any year of the displayed decade can be selected by clicking it. Once selected, the month view will be displayed.

Calendar control (year view)

If you prefer not to use the mouse, a date can be typed directly in the box. The date entered can be in one of several different formats, but it must be valid. For example, you could type any of the following:

- "08 10 08"
- "08/10/08"
- "8/10/2008"

Any of the dates above would be recognized by the calendar control and displayed as "8/10/2008". The values typed can be separated by forward slashes (/).

Tables

Throughout the Missouri First Steps application, tables containing search results and record lists display on various pages. When a table of data is available, you can click a column heading to sort the data in the table in ascending order by the selected column. Once selected, you can click the column heading again to sort the data in descending order.

At the bottom right of the table, you can view the total number of records contained within the table. When more than one page of records is available, you can click the following buttons at the bottom left of the table to navigate through the various pages:

- Click to display the first page of records.
- Click to display the previous page of records.
- Click to display the next page of records.
- Click to display the last page of records.

Telephone Numbers

The Missouri First Steps application allows you to record primary and alternate telephone numbers for better record keeping.

Phone section

You can enter the 10-digit home, work, mobile, and fax telephone numbers as necessary. Telephone numbers entered cannot begin with the following prefixes: 000, 911, 999, 900, or 555.

NOTE: Depending on the page displayed, some telephone number fields may not be available.

Glossary

6

6-Month Review Meeting Type: A 6-Month Review of the IFSP is required six months after the Initial meeting as well as six months after each Annual meeting. The 6-Month Review meeting must be scheduled and finalized before the next Annual meeting may be scheduled. The 6-Month Review meeting must be held during a current IFSP period. During the 6-Month Review meeting, the IFSP specifications for the current IFSP period cannot be changed, but IFSP data may be updated and service authorizations can be added.

A

Annual Meeting Type: Every 365 days, the IFSP needs to be reviewed by adding an Annual meeting. Annual meetings can only be scheduled after the Initial and 6-Month Review meetings have been finalized. The IFSP specifications for the next IFSP period are established during the Annual meeting and determined by the IFSP type.

B

Billing Entity: Payee-specific information based on the tax ID of the payee.

Billing Entity Agreements: Payee-specific agreements required for enrollment with the CFO.

Billing Entity Provider: A provider accounts that uses the billing entity's tax ID number. All payments for these provider accounts are paid to this billing entity.

Billing Entity Sites: Sites or locations enrolled with the CFO under the billing entity's Tax ID number.

C

Canceled Meeting Status: The meeting status of Canceled is only used for those meetings that are not going to be held and have a current status of Scheduled.

CCM: CCM is an acronym for the Child Care Management application.

CFO: A Central Finance Office.

Check Box: A check box is a control that enables the user to enable or disable one or more features or options. A check box appears as a small box (or square). When an option is enabled, a check mark (or an X) appears in the box. Clearing a check box disables an option. A check box can be selected or cleared by clicking on it with the pointer.

Claim Check: A check performed on a claim for correction before the claim is actually submitted to the CFO database.

Control: In a graphical user interface, a control is an object on the screen that can be manipulated by the user to perform an action. The most common controls are buttons, which allow the user to select options, and scroll bars, which allow the user to move through a document or position text in a window. Controls such as check boxes, drop-down lists, list boxes, radio buttons, tables, and text boxes are also referred to as fields within the content of this help system.

D

Default: A default is the selection, value, or text that the application automatically makes or places in a field when you display a screen. Defaults are used to help you complete a screen more quickly. For instance, many date fields default to today's date so that you do not have to type it on every screen. You can change a field from its default if necessary.

Drop-down List: A drop-down list is a control that enables the user to choose one option from a list of possibilities. A drop-down list appears as a box, displaying the currently selected option, next to a button marked with a down-arrow. When the user clicks on the button, a list appears. The list has a scroll bar if the list contains more options than can be displayed at once. The user can select an option from the list by clicking on it with the pointer.

E

Early Intervention (EI): This is a term which in general means identifying and effecting treatment for a problem as early as possible. Educationally it means that children with disabilities or handicapping conditions of some sort are identified at an early age and actions are taken to help these children as soon as identification occurs. Early intervention can range from prescribing glasses for a two year old (years before the child needs to use the glasses for school work) to developing a daily physical therapy program for a three month old child with cerebral palsy so the child does not begin to lose the potential use of his arms and legs as muscles develop unevenly. In an educational setting, early intervention can mean offering special education to children as soon as the child is diagnosed. These programs offer a high staff ratio with specialists trained in a variety of areas ranging from special education to speech and physical therapy. (See terms for definitions.) They often include components to train parents through parent seminars and self-help groups to build on the work done in the school. In cases where the children have physical handicaps or serious health problems, the programs frequently tie in with hospitals or health centers whose professionals work with the teaching staff to minimize the physical limitations of students while maximizing their growth potential.

EI: See definition for Early Intervention (EI).

Email notifications: Notifications that are sent to a specified email address for a provider account or billing entity. If an email notification is selected and a corresponding email address exists, an email notification is sent to the specified email address.

ERISA: ERISA is the Employee Retirement Income Security Act of 1974, or a Federal law that establishes legal guidelines for private pension plan administration and investment practices. ERISA is a major U.S. law that guarantees certain categories of employees a pension provided by their employer after a certain period of employment.

F

Field: A field is a control that allows a user input, select, or view information. Within the content of this help system, any of the following types of controls may be referred to as a field: a check box, a drop-down list, a list box, a radio button, a table, or a text box.

Filter: A filter is a tool used to control the results displayed when a search is performed. Filtering search results prevents the application from working overtime and speeds the search process. For example, on some web pages, you can enter filter criteria to narrow a search, and display a shortened list of search results -- or maybe the exact result for which you are searching.

H

Help Desk: The help desk is a part of the Covansys team. The individuals who make up the help desk team know a lot about the application and can help solve problems you may encounter when working with the application. When taking an action that may affect other workstations or servers and databases other than your own, you are directed by the application to contact the Help Desk in order to complete the action properly.

Hypertext Link: A hypertext link (or link) is text that can be clicked with a pointer to display a different web page or a passage of related text within the current web page. Hypertext links within the help system display as bright blue, underlined text.

I

Icon: An icon is a graphic representation of an object that a user can click or double-click to open, such as a disk drive, document, folder, program, or shortcut.

IFSP: See definition for Individualized Family Service Plan (IFSP).

Individualized Family Service Plan (IFSP): A written plan describing the infant's current level of development; the family's strengths and needs related to enhancement of the infant's or toddler's development; goals for the infant and the other family members (as applicable), including the criteria, procedures, and time lines used to evaluate progress (the IFSP should be evaluated and adjusted at least once a year and reviewed at least every six months); and the specific early intervention services needed to meet the goals (including the frequency and intensity and method of delivering services, the projected date of initiating services, and the anticipated duration of services). The IFSP is developed and implemented by the child's parents and a multi-disciplinary early intervention team. An assigned person, also known as a service coordinator, generally initiates an IFSP and works with the family to complete it as the child grows to preschool age.

Initial Meeting Type: The Initial meeting is required for each child in the program and is used to plan the IFSP for the child and family. The Initial meeting is a required meeting for each enrollment period. The very first meeting that can be scheduled must be an Initial or Interim meeting. An Annual, Inter-periodic, or 6-Month Review meeting cannot be scheduled if the Initial meeting has not been finalized. IFSP specifications are established during the Initial meeting and determined by the IFSP type.

Inter-periodic Meeting Type: A parent or other team member may call a team meeting at anytime. When this occurs, an Inter-periodic meeting needs to be created. Inter-periodic meetings are held at any time during an IFSP period. During the Inter-periodic meeting, the IFSP specifications for the current IFSP period cannot be changed, but IFSP data may be updated and service authorizations can be added.

Interim Meeting Type: The Interim meeting type is designed only for those children who require immediate Early Intervention services prior to the Initial meeting. The Interim meeting can only be held one time and it must be the very first meeting on a child's enrollment period. The very first meeting that can be scheduled must be an Interim or Initial meeting.

L

Lapsed IFSP: If a meeting cannot be held due to scheduling requirements causing a gap in the services that can be delivered to a child; the Case Administrator may create a Lapsed IFSP to cover these services for a maximum of 45-days until the meeting can be held. A Lapsed IFSP does not require a meeting be scheduled; because the Case Administrator uses the Location Administration menu option on the Child Care Management menu to create a Lapsed IFSP automatically. New service authorizations may not be created for a Lapsed IFSP. Instead, only those authorizations that existed from the previous IFSP period may be "continued" for the duration of the Lapsed IFSP period. A Lapsed IFSP cannot be created if a current IFSP exists on the child's record. Two Lapsed IFSP meetings cannot be created back to back. A Lapsed IFSP cannot be the first meeting created on a child's record.

Link: A link (or hypertext link) is text that can be clicked with a pointer to display a different web page or a passage of related text within the current web page. Hypertext links within the help system display as bright blue, underlined text.

List Box: A list box is a control that allows you to choose one or more options from a list of many possibilities. A list box appears as a box (or rectangle), displaying a list of available options. The list has a scroll bar if the list contains more options than can be displayed at once. Click on an option in the list to select (or clear) it. Multiple options may be selected by pressing and holding down the Shift key and clicking additional options. The information displayed in a list box is read-only and cannot be changed.

M

Menu Bar: A rectangular bar displayed in an application screen, often at the top, from which menus can be selected by the user. Names of available menus are displayed in the menu bar; choosing one with the keyboard or with a pointer causes the list of options in that menu to be displayed.

Menu Option: A choice on a menu, selectable by either the keyboard or a pointer. In some instances, a menu option that is not available is "grayed" (dimmed in comparison to the valid menu choices).

Minimize/Maximize: Minimizing a screen is a quick way to make a screen as small as possible, or to reduce the screen to its representative icon (or button) on the Windows Taskbar. Maximizing a screen is a quick way to enlarge a screen to the maximum allowable size (depending on your current monitor resolution settings). Screens can be maximized to the full size of your monitor's display area.

N

Neonatal Intensive Care Unit (NICU): An intensive care unit designed with special equipment to care for premature, low birth-weight, or seriously ill newborn children.

NICU: See definition for Neonatal Intensive Care Unit (NICU).

O

Ongoing Meeting Status: The meeting status is updated from Scheduled to Ongoing when the meeting date is the same as or prior to the current date. The status remains at Scheduled until the first meeting attendance record is updated and saved to the system. Once a meeting is Ongoing it cannot be Canceled or Rescheduled. A meeting will remain in Ongoing status until it is finalized.

P

PAM: PAM is an acronym for the Provider Account Management application.

Provider Account Agreements: Agreements required between the provider and the CFO for the enrollment of the provider account.

Provider Account Sites: Sites or locations used by the provider account.

Pull-down Menu: A pull-down menu is a menu that is accessed using the menu bar on a screen in the application. Pull-down menus provide additional methods of navigation within the application. Each menu contains a list of menu options that can be selected to perform various actions.

R

Radio Button: A radio button is a control that enables the user to choose from a group of mutually exclusive options. A radio button appears as a small circle and is always grouped with one or more other radio buttons. When a radio button is selected, a smaller, filled circle appears inside it. A radio button can be selected by clicking on it with a pointer. Selecting one radio button in a group clears the previously selected radio button, so that only one option in a group can be selected at a time.

Read-only Information: Read-only information is information that can be retrieved, viewed, or printed, but it cannot be updated, altered, or changed in any way.

Required Information: Required information is information that is required by the application before you can proceed. Required information must be entered (or selected) to continue the current process beyond the current web page.

Rescheduled Meeting Status: The Reschedule option is available if the meeting status is Scheduled and the meeting date or primary meeting type must be changed. If the primary meeting type or meeting date needs to be adjusted, the meeting can be Rescheduled. A Rescheduled meeting is saved as a new meeting with a status of Tentative. The originating meeting may not be updated once it has been Rescheduled.

S

Scheduled Meeting Status: A meeting can be Scheduled if no other meeting has a status of Scheduled or Ongoing and the meeting date is within 30 days in the future of the current date. If the meeting date is more than 30 days in the future, the meeting status will remain at Tentative. A meeting date in the past may be scheduled if it does not exceed 60 days as of the current date and does not supersede any other business rules (like an Annual meeting being held prior to the Initial meeting). Once a meeting is Scheduled, it may not be deleted.

Screen: A screen is the currently active window or dialog box displayed on your workstation or server. Alternately, the word "screen" may be used to refer to the display area of a monitor.

Site Detail: A detailed listing of site-specific information.

Specialty List: A list of specialties for a provider account. To make changes to the specialties associated with a provider account, the provider must contact the CFO.

Sub-tab: A sub-tab is a tabbed page within another tabbed page (see Tab). Sub-tabs usually display on the right-hand side of your screen. A label (the title or name of the sub-tab) is displayed on the sub-tab. You can click on a sub-tab to display the information available on the sub-tab.

System Tray: The System Tray is the area located at the bottom right-hand side of your Windows Taskbar. It contains the system clock and shortcuts to specific Windows tools that automatically start when Windows opens, like the Volume control.

T

Tab: A tab is a tabbed page on a screen that has a label. A tab usually displays on the upper edge of the screen with a cut away section giving the visual effect of multiple tab cards that are stacked against each other. A label (the title or name of the tab) is displayed on the tab. You can click on a tab to display the information available on the tab.

Table: A table is a grid control that displays separate entries of information in a table, index, or spreadsheet format. A table contains a block of text or data that is formatted in aligned rows and columns. Some tables allow you to enter information directly into the cells of the table, while other tables contain read-only information that cannot be changed.

Tentative Meeting Status: Meeting status of Tentative is given to all meetings when first created and saved. To schedule a meeting, the meeting status must be Tentative. Only meetings with a status of Tentative may be deleted on the Team Meeting Planner page. Tentative meeting information can be updated at any time.

Text Box: A text box is a control that enables the user to type (or enter) text. A text box appears as a rectangle. Some text boxes allow you to enter only numeric digits, and most are limited to a maximum number of characters.

Toolbar: A toolbar is a row of toolbar buttons or icons that normally displays at the top of a screen beneath the menu bar. When you click on one of the options in the toolbar, a specific function in the application is activated.

Toolbar Button: A toolbar button is a command button in the toolbar on a screen that performs a specific function.

Tree List: A tree list is a list of information that can be expanded or collapsed by clicking on a plus sign or a minus sign. Information displayed in a tree list is generally read-only information.

Tutorial Topics: Tutorial help topics contain direct, step-by-step instructions that you can use while learning how to perform specific tasks within the application. Tutorial help topics show you the quickest, easiest method for completing a particular application task. They contain the steps required to complete a task.

W

Windows Desktop: The Windows Desktop is the large area you see on your screen when Windows starts. The Start button and the Windows Taskbar are available on the Windows Desktop. You can customize the Windows Desktop by adding shortcuts to your favorite programs.

Windows Taskbar: The Windows Taskbar is the bar at the bottom of the Windows Desktop that contains the Start button, the System Tray, and a shortcut icon (or button) for each program that is currently open. The Windows Taskbar can be used to switch from one application to another. When applications are minimized to the Windows Taskbar, simply click on the representative icon (or button) displayed on the Windows Taskbar to restore the applications to their previously displayed state.