# Web IFSP Quick Reference Guide
Web IFSP Train-the-Trainer
January 2010

# Table of Contents

**Security**

The Iowa IDEA applications, Web IFSP and IEP, run on a secure server.  This is noted by the VeriSign SSL certificate link and padlock icon on the Iowa IDEA login screen.  The SSL certificate enables and enforces encrypted communication between the browser (consumer application) and the server application (Web IDEA apps).  Generally speaking, any URL, such as https://iep.aeaims.org/IDEA_Apps/ (our site) which begins with https:, as opposed to http:, would indicate a secure site.

If you wish to learn more about VeriSign SSL technology, use the following link:
http://www.verisign.com/ssl/ssl-information-center/how-ssl-security-works/index.html

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**Children to Pre-populate (add) into the Web IFSP System**

When deciding which children to pre-populate into the system, so they can be accessed by staff, the pilot experience has been helpful.

We have found that putting children into the system, far in advance of their first meeting, can be counterproductive.  We ended up deleting many of the children, manually from the database, because the team decided to exit them prior to the meeting.

We recommend that only one or two people have permission to 'Add Child' and that service coordinators send an email request to add a child a week or so prior to beginning work on the meeting.

Do not add children who will be turning 3 and transitioning out of Early ACCESS.

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**First Initial or Annual for a Child**

Step 1:  Add a child to a Service Coordinator Caseload and a Service Provider Child List.

1.  An Intake/Referral needs to be added to the system for every Initial IFSP (each signatory partner will determine who enters intakes/referrals into the system).  Refer to Appendix A and document "Guidelines for Intake/Referral Personnel for Web IFSP".
2.  For an Annual or Periodic IFSP, the Add a Child feature can be used.   If the first plan entered is a Periodic, Timeline tracking must be done manually and the following must be added:
    a.   The ECO from the Initial or last Annual must be added.
    b.   Current services must be added.
    c.   Outcomes must be added.
    d.   One Evaluation & Assessment record must be added.
3.  Service Coordination needs to be assigned in order for the child to show up on a Service Coordinator's Caseload

4. Difference between Caseload & Child List:
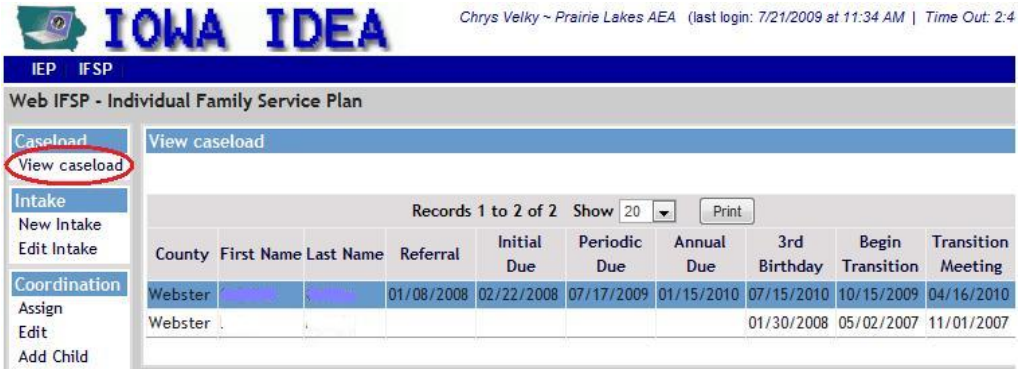


a. The Caseload list is for Service Coordinators only. It displays all of the children which have been assigned to them for Service Coordination.
b. The Child List is for Service Providers and lists all of the children for which there is an Early Intervention service defined and they are the selected Service Provider.
c. Service Coordinators who also provide Early Intervention Services will also have access the Child List in addition to their Caseload list.

Step 2: Obtain Family Information, Consent to Evaluate and any other needed information (Health Release, Exchange of Information, etc.) and enter in the system. Some forms are only available via the print menu because they require no data input (Consent for services, Medicaid parent authorization, & Consent for Evaluation).

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**How is information transferred from the Intake/Referral to Family Information?**

After an Intake/Referral is received and entered into the system. Service Coordination is then assigned, which places the child on the Caseload of the Service Coordinator. At the time the Service Coordinator access's the child from the Caseload list, the information is copied from the Intake/Referral into the Family Information. Any edits to the Intake/Referral after the Family Information is opened will not be reflected in Family Information. In addition, the 'Adult Notes' sections do not print on any outputs.
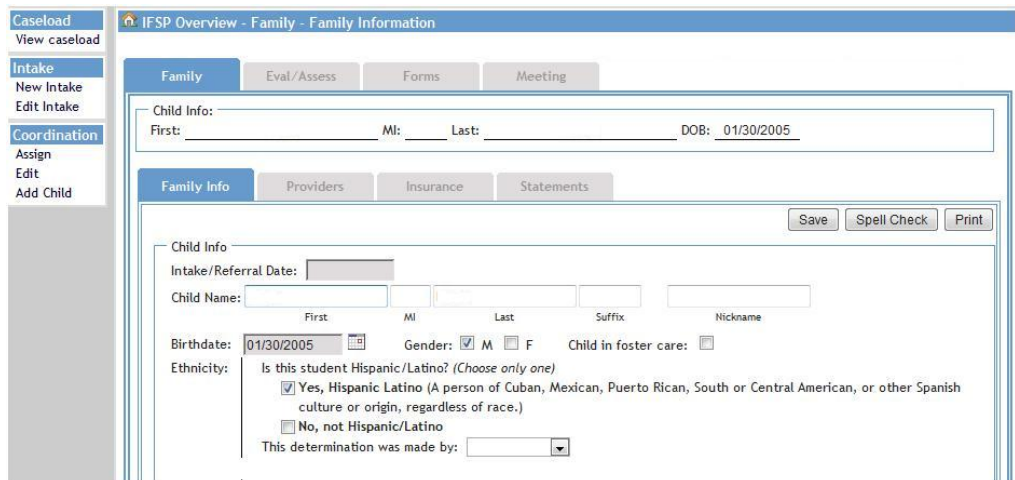
Step 3:  Service Coordinator starts a meeting and adds a service for the child and selects service provider (if service provider is not available contact IMS).  This adds the child to the service provider child list.



Step 4:  Service Coordinator and Early Access Team evaluate the child to determine eligibility and enter evaluations and assessments in the system.

Step 5:  Hold the meeting and complete the following required information:
1. Meeting Details
2. Outcomes
3. Services
4. Forms

Step 6:   Submit and Implement the Plan

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**Printing**

1. Any information that needs to be printed can be printed from the screen it is entered on.
2. Click on the Print button at the top or bottom of any of those screens
3. Any printable page/form can be printed from this menu separately or with other forms
4. The Print Menu is divided into three sections:
   - IFSP Main Forms
   - IFSP Additional Forms - Consent for services, Medicaid parent authorization, & Consent for Evaluation (only available from print menu)
   - Options
5. For each page/form, you can select:
   a. A completed page/form, indicated below as "Form" OR
   b. A blank page/form, indicated below as  "Blank" OR
   c. Both a blank and completed page/form, indicated below as  "Both"
   d. If a page/form is empty or not required, the only choice will be "Blank"
6. Also available is:
   a.  Print Preview
   b.  Incomplete Data Report
   c.  IMS Summary

7. Once the Print Preview is generated, any single page can be deleted from the Preview by clicking on the red X at the top of any page. This only cancels the sending of that page to the printer. It does not delete the form and data from the electronic record.



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**Pre-Plan**  Available once a plan has been implemented. To be used in preparation for the next meeting. (Family information can be updated, forms created, etc.) Services, outcomes, & family information is carried over to the new plan.

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**Case Closure**  A case can be closed via four of these options as long as a meeting hasn't been started. If a meeting has been started, the meeting would need deleted. The 'Case Closure' options are on the bottom of the Intake/Referral screen. The four options are:

- Parent(s) declines consent for evaluation for eligibility determination / informational only.
- Parent(s) withdrew consent for evaluation and/or IFSP completion. No further action in Early ACCESS
- Family moved / Unable to locate family
- Death of child

One new checkbox has been added to the 'Case Closure' options at the bottom of the Intake/Referral screen. The example below shows the new choice in red for illustration purposes only. This option is automatically checked when marking 'Eligibility: No' on the Meeting Tab.

Also, displayed in blue is the second choice, which will automatically be completed on the Meeting tab of a new plan by marking 'Eligibility: Yes' AND 'Eligible: Parent Declined:'. Marking the eligibility choices this way will remove all other 'Incomplete Data Report' items and the plan may be electronically implemented.  This process will:

- Archive all documents related to the plan.
- Complete the 'Case Closure' section of the Intake/Referral
- End Service Coordination
- End all services
- Remove the child from the Caseload and Child List.



Intake/Referral Case Closure options

**FOR CASE CLOSURE PRIOR TO COMPLETION OF ELIGIBILITY DETERMINATION OR INITIAL IFSP**

☐ Parent(s) declines consent for evaluation for eligibility determination / informational only.
☐ Parent(s) withdrew consent for evaluation and/or IFSP completion.  No further action in Early ACCESS.
☐ Parent(s) signed consent for evaluation and the evaluation determined this child 'Not Eligible' for EA services.
☐ Family moved / Unable to locate family
☐ Death of child

Notes:

Date:        /        /

**Transition Planning**

The system provides a transition time line by supplying dates of 9 months, 6 months and 90 days prior to the child's third birth date. However, the Transition Plan is available anytime after the first plan is started.

All parts of the Transition screen are required unless they do not apply to the child. The plan is required for all children who are two years and three months old when exiting.



**System Features**



- Calendar – Must be used to complete all dates. Note: also available selecting today's date or a blank date.
- Tabs – Tabs are used to access different IFSP pages and forms. Each tab will display a number of incomplete required fields and will count down as they are completed. If you want to know which items are incomplete you can use incomplete data report on the print menu.

- Buttons (located at the top & bottom of each screen)
  - Save
  - Spell Check
  - Print
- Bank "B": Can be used to store information that is commonly used on IFSPs. This information is linked to the person entering the bank.
- Lookup field "L": A non-editable field that contains signatory partner information.
- Agency Lookup "L": Found on Intake/Referral, Provider & Exchange of Information. If an agency is not listed that you need contact your Web IFSP Administrator.
- In some fields there is a "blank" option in the drop down menu, if you need to empty a field.

**Exiting a Child**



1. A plan must be implemented prior to exiting a child on the Web IFSP.
2. Click on "exit" on IFSP overview screen.
3. Enter the date of exit. This then determines (based on the age of the child and the date of exit) whether a transition plan is required.
4. Complete incomplete components by clicking on the "go" to complete the documents. Click on "save & back to exit".
5. Enter exit code.
6. Print plan.
7. Do NOT click on "final exit the child" until you have printed the plan.

**If a child is determined "Not Eligible" by evaluation after parent signed consent**

The following must occur to remove the child from the SC Caseload list:

1. Electronic meeting record must be started and the following completed:
   a. Meeting date
   b. Eligible?: must be checked 'No'
   c. Save Meeting
2. Submit and Implement record. This process will:
   a. Archive all documents related to the plan.
   b. Complete the 'Case Closure' section of the Intake/Referral
   c. End Service Coordination
   d. End all services
   e. Remove the child from the Caseload and Child List.

(In addition to the Intake/Referral, some or all of the following may exist in the system prior to eligibility determination; Family information, Evaluation & Assessments, Forms, Meeting, etc.)

# Appendix A

# Approved Browsers

- Mac OS 10.4
  - Firefox Version 3 *

- Windows 2000, XP, Vista
  - Internet Explorer Version 7 and 8
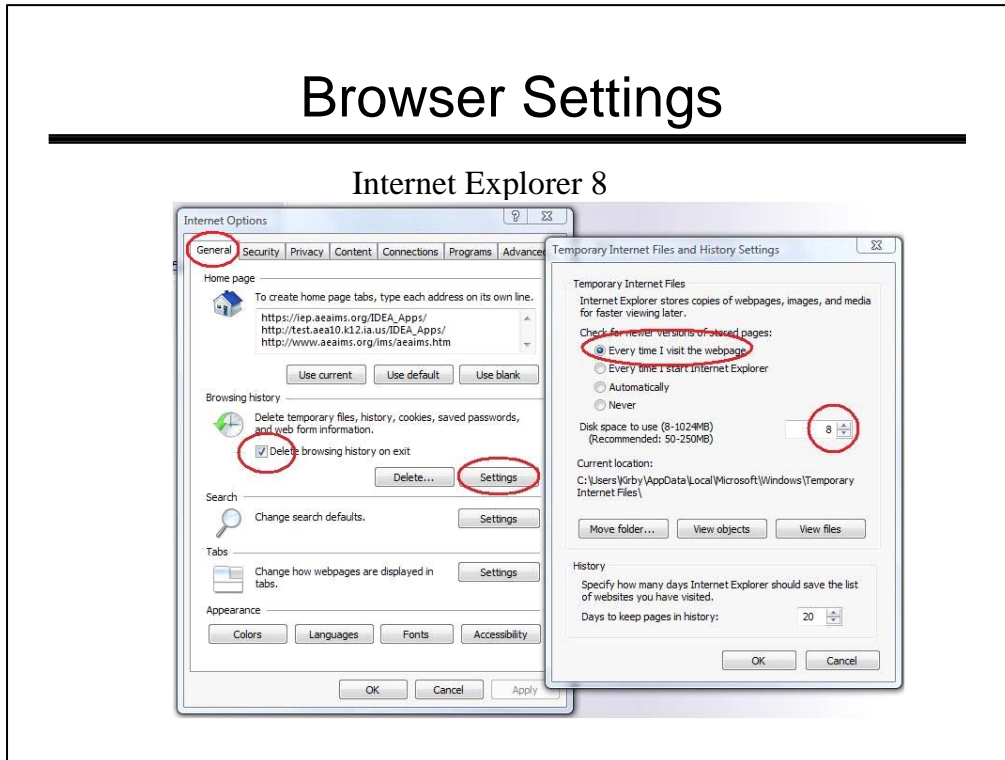  - Firefox Version 3 *

Mac OS 9 is no longer supported.

Safari will no longer be tested and supported.

Other browsers are not supported.

**\*State level testing has shown that Firefox 3.0 on both Macintosh & Windows platforms provides the most consistent performance.**

# Browser Settings

Internet Explorer 8



The browser's cache stores copies of frequently visited web pages on your hard disk, which may interfere with the Web IEP. Change your browser's cache settings before you log in to the Web IEP the first time.
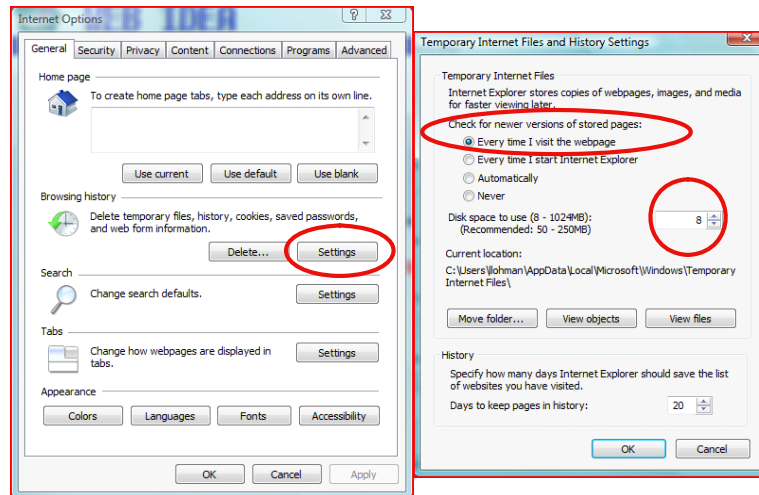
•Browser settings should be set to: "Check for newer versions of stored pages: Every visit to the page"

•Cache disk space should be set to "8" for Internet Explorer 8.0. Other browsers may not have these options.

The example above shows Internet Explorer 8.0 for Windows. Your browser settings may look slightly different. This information is available in the IEP section of the Iowa IDEA website at www.iowaidea.org.

**See your Technology Coordinator for help!**
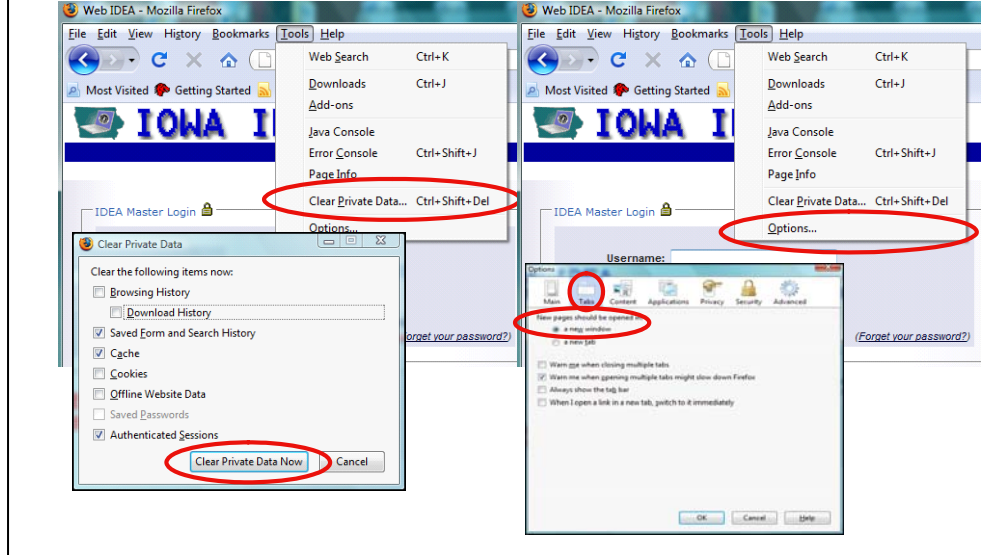
# Browser Settings

Internet Explorer 7.0



The browser's cache stores copies of frequently visited web pages on your hard disk, which may interfere with the Web IEP.  Change your browser's cache settings before you log in to the Web IEP the first time.
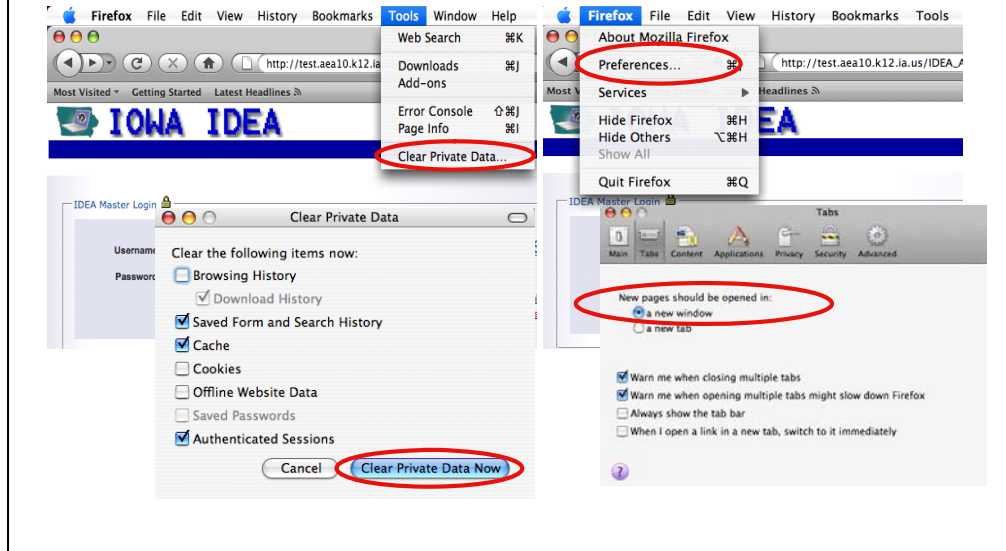
•Browser settings should be set to:  "Check for newer versions of stored pages: Every time I visit webpage"

•Cache disk space should be set "8" for Internet Explorer 7.0. Other browsers may not have these options.

The example above shows Internet Explorer 7.0 for Windows. This information is available in the IEP section of the Iowa IDEA website at www.iowaidea.org.

# Browser Settings

## Firefox 3.0 for Windows



The browser's cache stores copies of frequently visited web pages on your hard disk, which may interfere with the Web IEP. Change your browser's cache settings before you log in to the Web IEP the first time.

•Browser settings should be set to clear private data.
•Browser settings should be set to "New pages should be opened in: a new window"

The example above shows Firefox 3.0 for Windows. This information is available in the IEP section of the Iowa IDEA website at www.iowaidea.org.

**See your Technology Coordinator for help!**

# Browser Settings

Firefox 3.0 for Macintosh



The browser's cache stores copies of frequently visited web pages on your hard disk, which may interfere with the Web IEP.  Change your browser's cache settings before you log in to the Web IEP the first time.

•Browser settings should be set to clear private data.
•Browser settings should be set to "New pages should be opened in: a new window"

The example above shows Firefox 3.0 for Macintosh.  This information is available in the IEP section of the Iowa IDEA website at www.iowaidea.org.

**See your Technology Coordinator for help!**

# Browser Settings

- Allow pop-ups for the Web IEP site

- Allow Java Script (The default setting is to allow)

- Bypass Proxy Servers

**See your Technology Coordinator for help!**

The Web IEP uses pop-up windows in many places (i.e., banked data, printing, and code selection) so pop-ups must be allowed for this site.
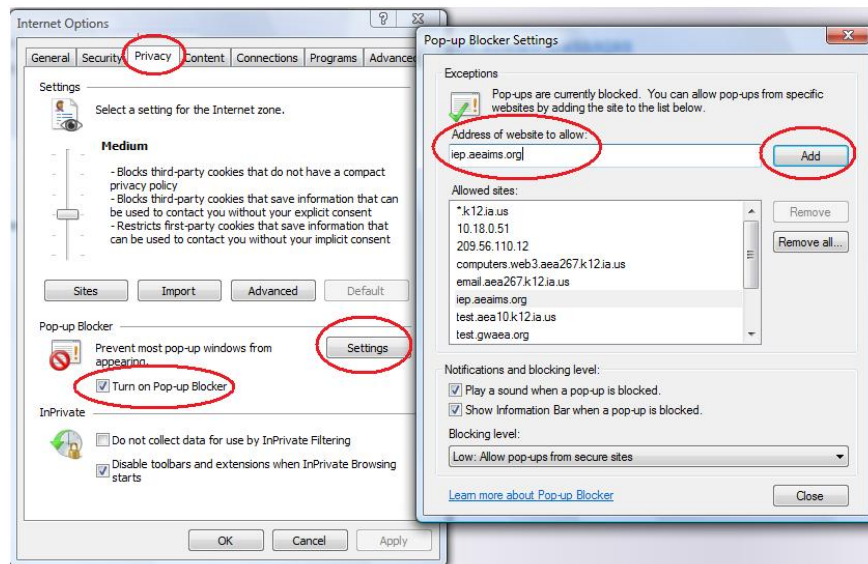


Note: Third-party toolbars (i.e., Google, Yahoo, WeatherBug, etc.) may also block pop-ups in addition to the browser pop-up settings.

Proxy servers store web pages. Bypass proxy servers for the Web IEP site.

# Internet Explorer 8.0 Print Background Images

To properly print all lines and graphics on the IEP pages, Internet Explorer 8.x must have the box checked for "Print background colors and images"
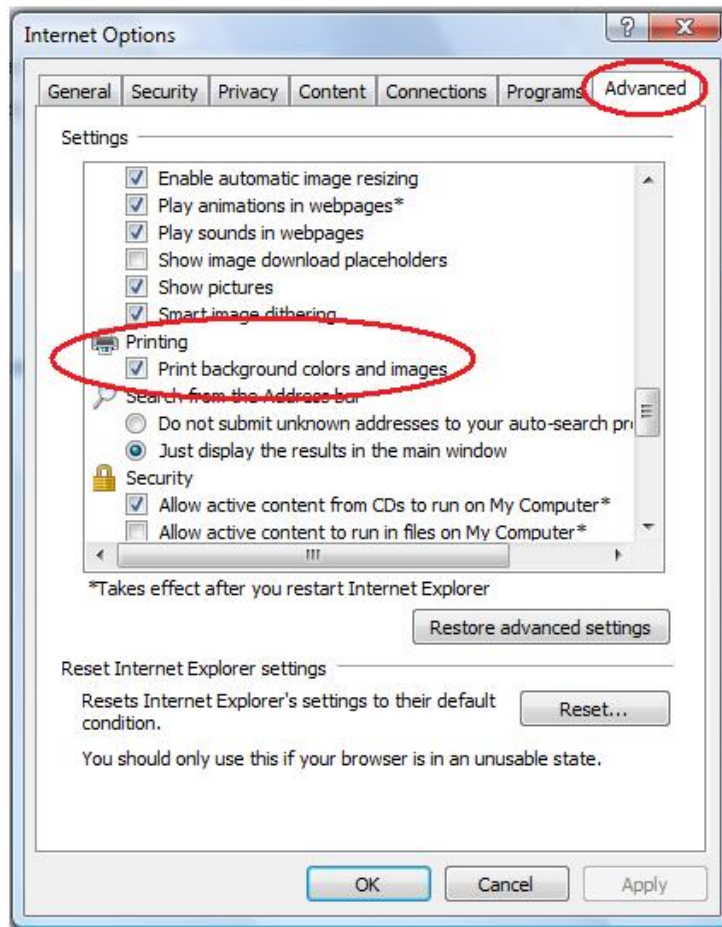
# Autocomplete

Internet Explorer will try to complete forms based upon the last response you placed in a field the last time you referenced any page, such as a Meeting Notice. You do not want this to occur and need to turn off Autocomplete.

# Time Out

# Bug Reports

# My Preferences

# Appendix B
# IFSP Utilities for Web IFSP Administrators

**Merge**        Enter a portion of incorrect name and DOB on incorrect name

- Change child ID
- Change name
- Change DOB
- Delete child from Web IFSP system

**IFSP Utilities - Merge**

Child Search

*Name does NOT have to be exact but DoB does

Name: [    ] [    ]   DoB: [    ] 🗓

First          Last

OR

Child ID: [    ]

[ Search ]  [ Reset ]

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**Change Provider**    Choose the child's district, choose the service that needs changed, and choose the old provider. Click on "search". Click "edit" next to the child that need changed, then choose the new provider and put in effective date.

**IFSP Utilities - Change Service Coord**

Change Provider

Pick Agency: [ AEA 10 ▼ ]

Pick service to update:

District:               Service:               Provider:

[    ] 𝐋 [ Choose a service code ▼ ] [    ] 𝐋

[ Search ]  [ Reset ]

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**Agency Lookup**     Agencies are "Looked up" by typing in a minimum of three characters of the Agency Name.  If a new agency needs added, use the 'New' link at the bottom.  This is the only location in the program where Agencies may be added or edited.  Contacts for agencies may also be added and edited here as well.  Users may add and edit, without restriction, contacts for any agency, once the agency is setup in the system.  They may add these contacts on the forms where they are needed.