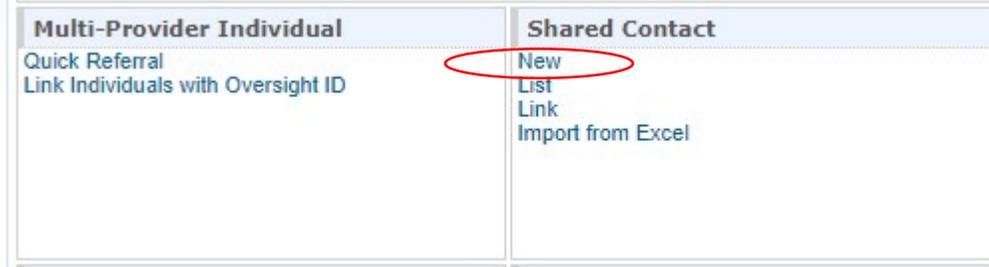


Adding a Shared Contact to Therap (DDPM Only):

These individuals are people who can be shared across various clients. For example, a private therapist who often attends meetings or submits information. These individuals are NOT specific to a client.

1. On your home page, select “New” from the Shared Contact module.



2. Enter the individual’s information, which must include an address and phone number, and select the type of Shared Contact.

Shared Contact [New](#) ⓘ

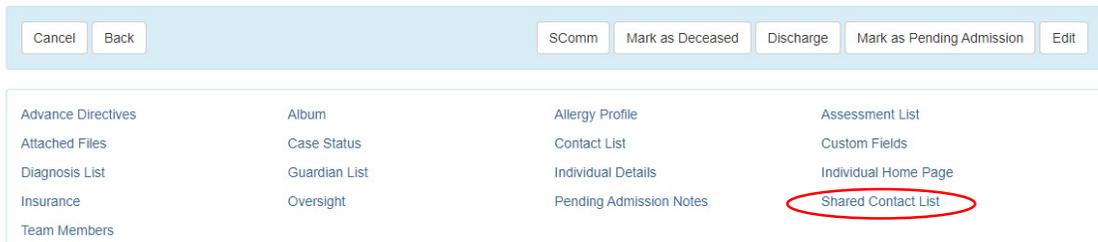
A form for entering individual information. It has two columns of input fields. The left column contains: Title, Middle Name, Organization Name, * Type (dropdown menu with "- Please Select -"), and Specialty (dropdown menu with "- Please Select -"). The right column contains: First Name, Last Name, and NPI Number. All fields are empty.

3. Select “Save” at the bottom of the page. This will save the Shared Contact to the Shared Contact List.

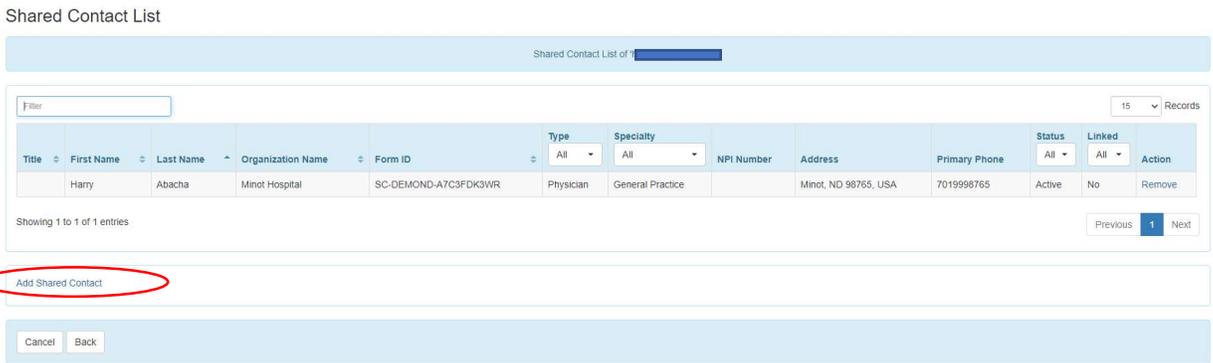
A form titled "Mailing Address". It contains several input fields: "Attention or in care of", "Address" (split into "Street 1" and "Street 2"), "City", "State" (dropdown), "Zip Code", "Country" (dropdown), "Primary Phone", "Secondary Phone", "Additional Phone", and "Fax". There is a checkbox labeled "Same as Primary Address". At the bottom of the form, there are three buttons: "Cancel", "Back", and "Save". The "Save" button is circled in red.

Adding a Shared Contact to an individual from the Shared Contact List (DDPM and PEIP):

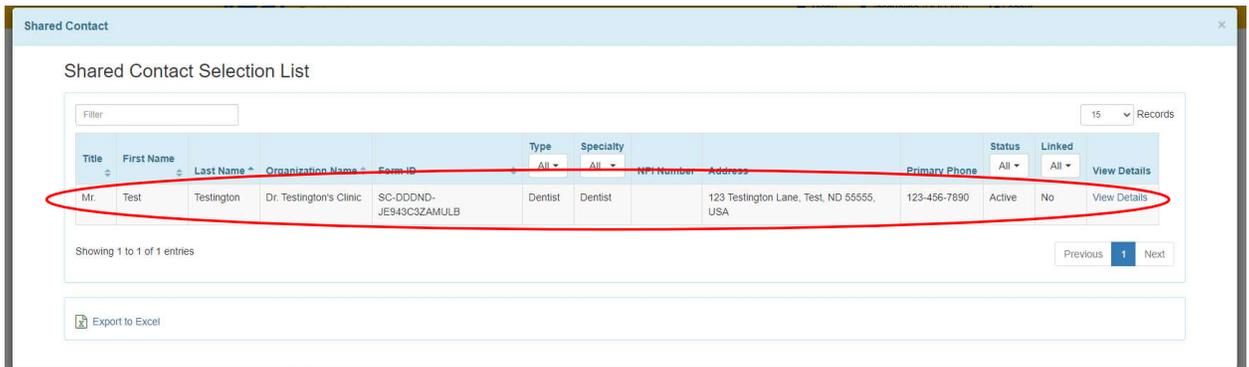
1. In the client's IDF, at the bottom of the page, select "Shared Contact List".



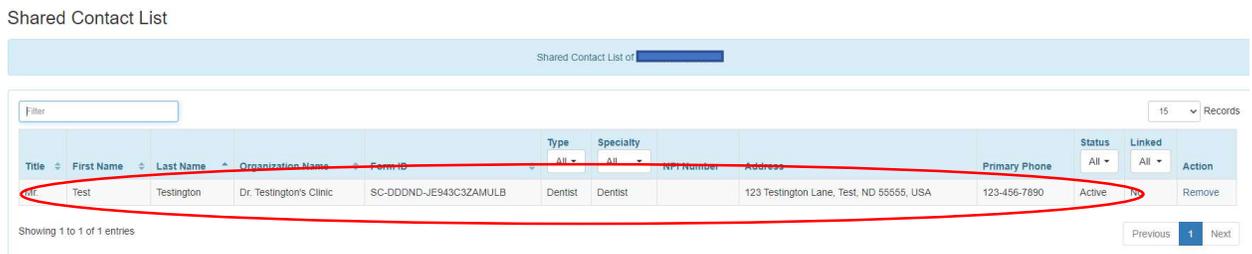
2. In the Shared Contact List, you can add a shared contact by selecting "Add Shared Contact."



3. A list of available Shared Contacts will appear. Select the contact you would like to add by clicking on the line.



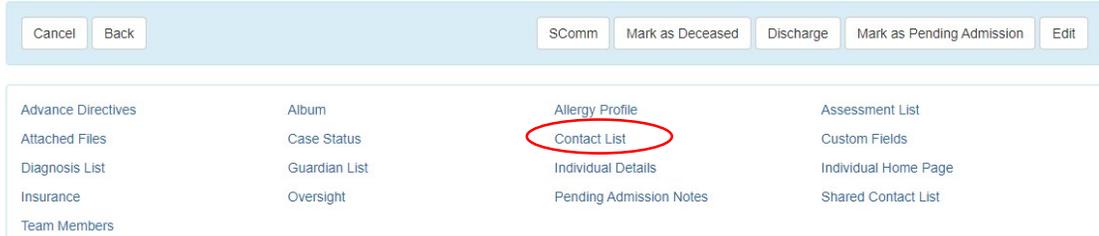
4. The Shared Contact will now appear under the client's Shared Contacts List.



Adding a Contact to an Individual (DDPM and PEIP):

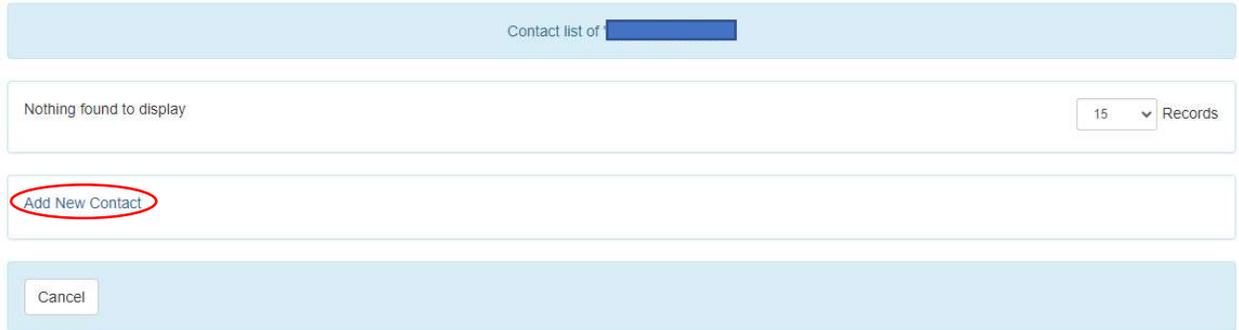
These are individuals who are unique to the client, such as the client’s parent or neighbor. These are not individuals who would be shared among other clients.

1. On the IDF page, select “Contact List”.



2. Select “Add New Contact” at the bottom of the page.

Contact List



3. Complete the individual’s information, indicate the relationship to the client, and whether the individual is the emergency and/or mailing contact.

Individual Contact New

A screenshot of the 'Individual Contact' form. At the top, it shows 'Individual [redacted]'. The form contains several input fields: '* First Name', 'Middle Name', '* Last Name', and 'Agency'. There is a dropdown menu for '* Relationship To Individual' with the text '- Please Select -'. Below these are two radio button options: 'Emergency Contact' (Yes/No) and 'Mailing Contact' (Yes/No). At the bottom, there is a large text area for 'Comments' with a character count 'About 3000 characters left' and a green circular icon in the bottom right corner.

In the next section, indicate if the individual is the client’s guardian. Note that this is not needed for a parent of a minor child as long as the “parent” relationship is selected above.

Guardian

Is Guardian

Guardian Type

Guardian Authority

Established County State

Established County

Established Date

Established End Date

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add the individual's address and phone number in the last section(s).

Address

Attention or in care of	<input type="text"/>	<input type="checkbox"/> Same as Residence Address		
Address	<input type="text"/>	<input type="text"/>		
Street 1		Street 2		
<input type="text"/>	State <input type="text" value="State"/>	<input type="text"/>	Country <input type="text" value="Country"/>	
City	State	Zip Code	Country	
Primary Phone	<input type="text"/>	Extension	<input type="text"/>	<input type="checkbox"/> Same as Primary Residence Phone
Secondary Phone	<input type="text"/>	Extension	<input type="text"/>	<input type="checkbox"/> Same as Primary Residence Phone
Additional Phone	<input type="text"/>	Fax Number	<input type="text"/>	
E-mail	<input type="text"/>	Web Address	<input type="text"/>	

4. Select "Save" at the bottom of the page to add to the individual's Contact List.

Secondary Phone	<input type="text"/>	Extension	<input type="text"/>
Additional Phone	<input type="text"/>	Fax Number	<input type="text"/>

5. The individual you just added will now appear in the individual's Contact List.

Contact List

Contact list of [REDACTED]

Filter 15 Records

Contact Name	Contact Type	Agency	Residential Phone	Address	Mailing Address	Comments	Deleted
Testington, Jane	Emergency Contact (24 hr), Mailing Contact, Parent		1234567890	123 Testington Lane, Test, ND 55555, USA			No

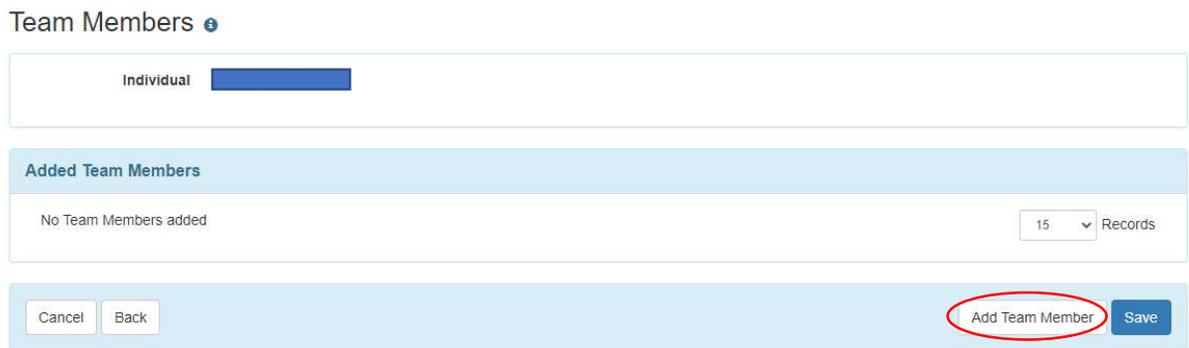
Showing 1 to 1 of 1 entries Previous 1 Next

Adding Shared Contacts, Contacts and User's to a Client's Team (DDPM and PEIP):

1. On the IDF page select "Team Members". Note that Team Members MUST be added for the IFSP to function properly.

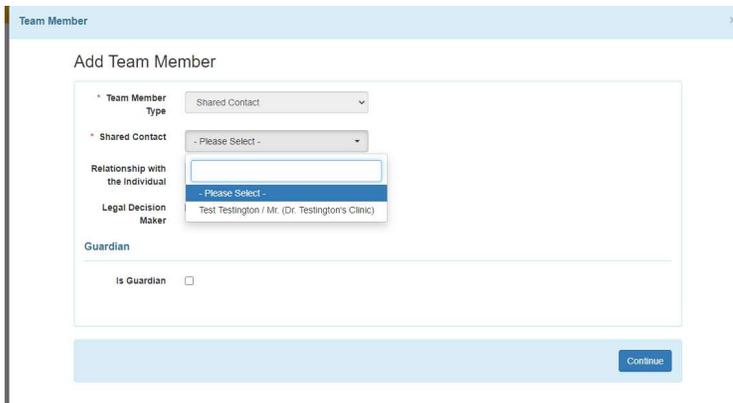


2. Select "Add Team Member" at the bottom of the page.



3. Select the type of contact you'd like to add.

If you select **Shared Contact**, you'll see the Shared Contact you added earlier. Click on the individual, complete the relationship and indicate if s/he is the legal decision maker. Select "Continue" at the bottom of the page.



If you select **Contact**, you'll see the contact you added earlier. Click on the individual and if s/he is the legal decision maker. The relationship with individual field will be automatically filled in. Select "Continue" at the bottom of the page.

Team Member

Add Team Member

Team Member Type: Contact

Contact: - Please Select -

Relationship with the Individual: - Please Select -

Legal Decision Maker: Jane Testington

Guardian: Is Guardian

Continue

If you select **User**, you'll see a list of people who have accounts in Therap. Here you'll see the PEIP or other people working with the client. Click on the individual, complete the relationship and indicate if s/he is the legal decision maker. Select "Continue" at the bottom of the page.

Team Member

Add Team Member

Team Member Type: User

User: - Please Select -

Relationship with the Individual: - Please Select -

Legal Decision Maker: [List of names and titles]

Guardian: Is Guardian

Continue

4. You'll see all the people you've added to the client's team when you click on "Team Members" now. Select "Save" when you've finished adding Team Members.

Team Members

Individual: [Redacted]

Added Team Members

Filter: [] 15 Records

Type	Name	Relationship with the Individual	Legal Decision Maker	Deleted
User	Alison Peterson, Program Manager, DDD	Service Coordinator	No	No
Contact	Jane Testington	Parent	Yes	No
Shared Contact	Test Testington / Mr. (Dr. Testington's Clinic)		No	No

Showing 1 to 3 of 3 entries

Previous 1 Next

Cancel Back Add Team Member **Save**

- To delete a team member, click on the individual's line.

Team Members ⓘ

Individual [Redacted]

Added Team Members

Filter 15 ▼ Records

Type	Name	Relationship with the Individual	Legal Decision Maker	Deleted
User	Alison Peterson, Program Manager, DDD	Service Coordinator	No	No
Contact	Jane Testington	Parent	Yes	No
Shared Contact	Test Testington / Mr. (Dr. Testington's Clinic)		No	No

Showing 1 to 3 of 3 entries Previous 1 Next

Cancel BackAdd Team Member Save

- At the bottom of the page, select "Delete" to remove this individual from the client's team. This does not delete the individual from Contacts, Shared Contacts, or Users.

Team Member x

Update Team Member

Team Member Type Shared Contact

Shared Contact Test Testington / Mr. (Dr. Testington's Clinic)

Relationship with the Individual

Legal Decision Maker

Guardian

Is Guardian

Delete Continue

7. This individual is now no longer part of the client’s team. Click “Update” at the bottom of the page to save the client’s team.

Team Members 

Individual 

Added Team Members

Filter 15 Records

Type	Name	Relationship with the Individual	Legal Decision Maker	Deleted
User	Alison Peterson, Program Manager, DDD	Service Coordinator	No	No
Contact	Jane Testington	Parent	Yes	No

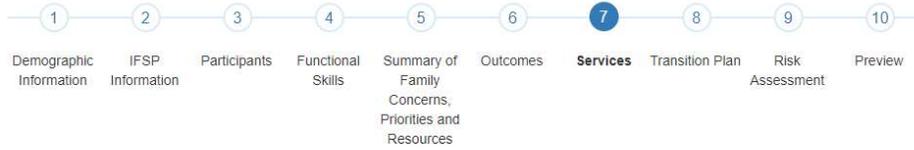
Showing 1 to 2 of 2 entries (filtered from 3 total entries) Previous 1 Next

Cancel Back Add Team Member **Update**

Adding Services to the IFSP (DDPM Only):

1. In the child’s IFSP, select the “Services” section.
2. On the Services page, select “Add New”

Individual Family Service Plan **Draft** 



Services

Add New

Cancel Back Previous **Save** **Save & Next** Preview

3. On the page that comes up, you will need to enter all of the starred information as well as disposition and funding. If the service is a consultation, you must also select an outcome.

Individual Service 

* Start Date 

* End Date 

Termination Date 

* Service

* Service Provider

Professional

Disposition

Funding

* Required or funded by Part C? Yes No

Outcomes

* Length of Session

* Frequency * Sessions

* Intensity

* Location

Method

If you select “No” under the question about natural environment, you will need to enter a justification statement in the box that appears. Once you have entered all the required information, select “Add” at the bottom of the page.

*** Is the Service provided in the natural environment for that child or service to the maximum extent appropriate?** Yes No

*** If the Service is not provided in the natural environment, the justification for that determination, made by IFSP team, based on the child's outcomes**

About 3000 characters left

Transition Service

Add

Note: At the IFSP meeting, the team should be discussing which outcomes require a consultation as well as if the service is being provided in the natural environment. If you are unsure of these items, please discuss it with the PEIP to get the correct information entered into this section.