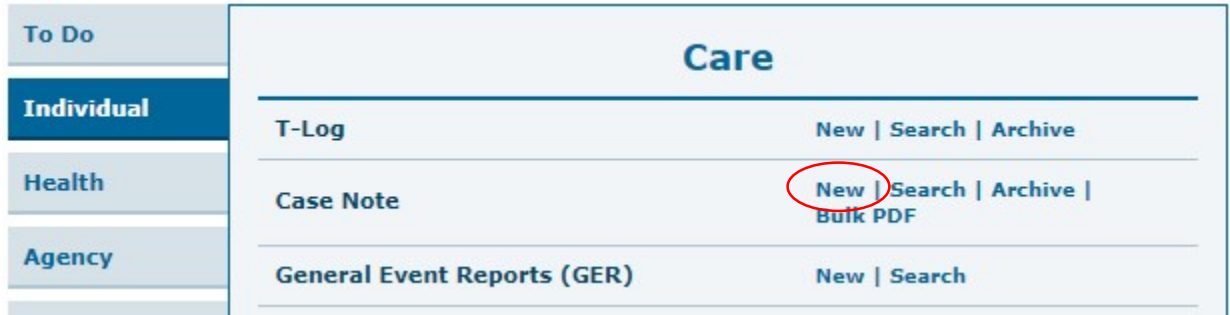


Case Note Types for IFSP

Creating a new Case Note

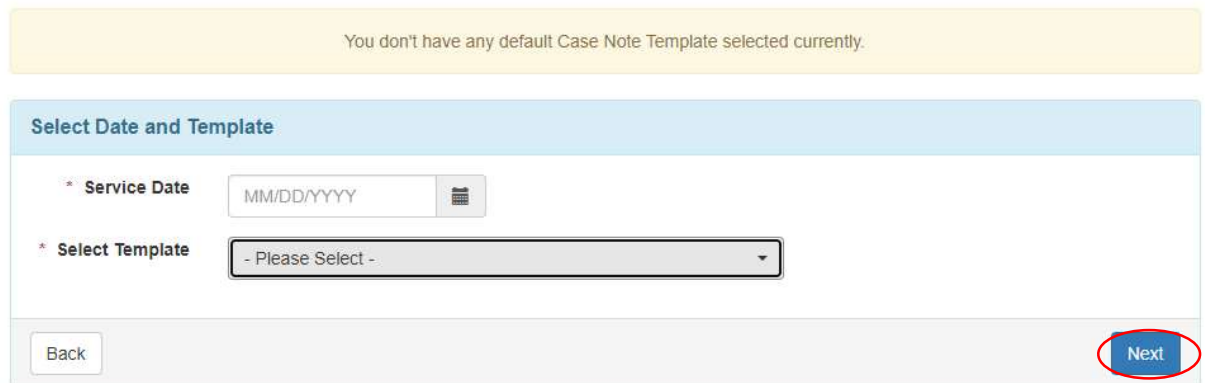
1. On the Individual Tab, under the Case Note section, select “New”.



To Do	Care
Individual	T-Log New Search Archive
Health	Case Note New Search Archive Bulk PDF
Agency	General Event Reports (GER) New Search


2. Select the individual you'd like to create a case note for. You'll then see this screen:

New Case Note



You don't have any default Case Note Template selected currently.

Select Date and Template

* Service Date 

* Select Template

Back Next

Enter the date the activity took place and select the type of case note you'd like to create. The drop-down will list the following case notes:

- General- Updated 7.2022
- Home Visit- Updated 7.2022
- Consultation- Updated 7.2022
- Evaluation/Assessment- Updated 7.2022
- IFSP/IFSP Review- Updated 7.2022
- Transition- Updated 7.2022
- Child Outcomes- Updated 7.2022

Note: The Initial Risk Assessment (RMAP), Signed ISP, Signed ID Authorization, and IFSP Signature Page (not PWN/Consent) must be attached to the end of the IFSP, not a case note.

Optional Case Notes

General EI:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Activity Type: You may choose from Family Contact Notes, Scheduling, Service Delivery, No-Show, or Other.
 - c. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - d. Person Contacted: You may list the person contacted here, if appropriate.

Template: General EI- Updated 7.2022

Case Note Details

Individual

* Service
Provider

Adusumilli, Jacqueline / Central Office Staff, DI ▼

Service Date

04/18/2022

* Activity
Type

- Please Select - ▼

Face to Face

☐ Yes ☐ No

Person
Contacted

- Please Select / Add New - ▼



Questionnaire

General

No Question Answered

Open

Attachment(s)

2. In the Questionnaire, you will be able to complete the following information:
 - a. Question 1: You may select the type of attempt to communicate from the drop down. Your choices are Email, Text, Phone Call, Letter.
 - b. Question 2: You may select the outcome of the attempt to communicate from the drop down. Your choices are No Response, Cancellation, Successful.
 - c. Question 3: You may enter the attempt number (just a numeral) in this box.

Answer Questionnaire

General

Filter Reset

1. Type of attempt
[Not Answered]

2. Outcome of attempt
[Not Answered]

3. Attempt Number
[Not Answered]

1. Type of attempt
Select

Save & Next Next
Save

Close Popup

Be sure to select “Save and Next” after each question you answer, and “Close Popup” once you’ve completed the questionnaire.

3. You are able to add an additional attachment or add notes on the main case note screen, if you would like.

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File Scan File

Note

B / U [List Icons] 11pt [Font Size Icon] [Link Icon] [Unlink Icon]

Cancel Back Save Submit

4. Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Home Visit:

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Location: You may choose from Home, Child Care, Community , School or Other.
 - c. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - d. Person Contacted: You may list the person contacted here, if appropriate.

Template: Home Visit- Updated 7.2022

Case Note Details

Individual

* Service
Provider

Adusumilli, Jacqueline / Central Office Staff, DC

Service Date

04/18/2022

* Location

- Please Select -

Face to Face

☐ Yes ☐ No

Person
Contacted

- Please Select / Add New -



Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File

Scan File

Note

B	<i>I</i>	<u>U</u>			11pt				

2. You are able to add an attachment or additional notes on the main case note screen.

The screenshot displays a web interface for adding attachments and notes. At the top, the 'Attachment(s)' section includes a yellow warning box stating 'The total size of all attachments cannot exceed 10 MB' and two buttons: 'Add File' and 'Scan File'. Below this is the 'Note' section, which features a rich text editor with a toolbar containing bold, italic, underline, bulleted list, numbered list, indent, outdent, link, unlink, and undo/redo icons. The editor has a font size dropdown set to '11pt' and a large text area for input. At the bottom of the interface is a light blue bar with 'Cancel' and 'Back' buttons on the left, and 'Save' and 'Submit' buttons on the right. The 'Submit' button is highlighted with a red circle.

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Required Case Notes

Consultation:

Required attachments: Consultation notes

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the consultation.
 - c. Activity Type: You may choose from Initial OT, OT, Initial PT, PT, Initial ECSE, ECSE, Initial SLP, SLP, Initial Nursing, Nursing, Initial Social Work, Social Work, Initial Vision, Vision, Initial Hearing, or Hearing consultation.
 - d. Location: You may choose from Home, Child Care, Community or Other.
 - e. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - f. Person Contacted: You may list the person contacted here, if appropriate.

Template: Consultation- Updated 7.2022

Case Note Details

Individual

* Service Provider

Adusumilli, Jacqueline / Central Office Staff, Df

Service Date

04/18/2022

* Activity Type

- Please Select -

* Location

- Please Select -

Face to Face

☐ Yes ☐ No

Person Contacted

- Please Select / Add New -

* Attachment(s)

The total size of all attachments cannot exceed 10 MB

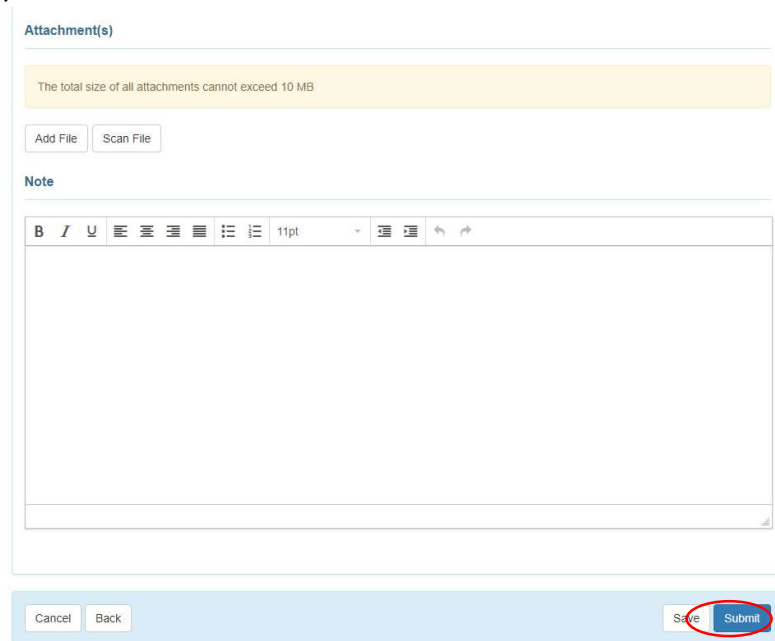
Add File

Scan File

Note

B *I* U 11pt

2. You are required to add an attachment to the case note. You may add notes on the main case note screen, if you would like.



The screenshot shows a web form for adding a case note. At the top, there is a section titled "Attachment(s)" with a yellow warning box stating "The total size of all attachments cannot exceed 10 MB". Below this are two buttons: "Add File" and "Scan File". The main section is titled "Note" and contains a rich text editor with a toolbar featuring bold, italic, underline, bulleted list, numbered list, indent, outdent, link, and unlink icons. The text area is empty. At the bottom of the form, there is a blue bar containing "Cancel" and "Back" buttons on the left, and "Save" and "Submit" buttons on the right. The "Submit" button is highlighted with a red circle.

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Evaluation/Assessment:

Required attachments: Signed Prior Written Notices and Consent for Evaluation/Assessment

Note: The Evaluation Report should not be attached to the Case Note. It must be attached in the Functional Skills section of the IFSP for an eligible child, or the documents section of the Child Not Eligible Documentation form for a child who is not eligible.

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Activity Type: You may choose from Initial Evaluation and Assessment or Annual Assessment
 - c. Location: You may choose from Home, Child Care, Community or Other.
 - d. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - e. Person Contacted: You may list the person contacted here, if appropriate.

Template: Evaluation/Assessment- Updated 7.2022

Case Note Details

Individual

* Service Provider Adusumilli, Jacqueline / Central Office Staff, DI ▾

Service Date 04/18/2022

* Activity Type - Please Select - ▾

* Location - Please Select - ▾

Face to Face ☐ Yes ☐ No

Person Contacted - Please Select / Add New - ▾ ⓘ

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File

Scan File

Note

B	<i>I</i>	<u>U</u>			11pt			

2. You are able to add an attachment or additional notes on the main case note screen.

The screenshot displays a web interface for adding attachments and notes. At the top, the 'Attachment(s)' section includes a yellow warning box stating 'The total size of all attachments cannot exceed 10 MB' and two buttons: 'Add File' and 'Scan File'. Below this is the 'Note' section, which features a rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, decrease indent, increase indent, link, unlink, and font color. The font size is set to 11pt. The main area of the note editor is a large, empty text box. At the bottom of the interface, there is a light blue bar with four buttons: 'Cancel', 'Back', 'Save', and 'Submit'. The 'Submit' button is highlighted with a red circle.

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

IFSP/IFSP Review:

Required attachments: Signed Prior Written Notices, Signed IFSP Consent Page

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Activity Type: Select the type of IFSP Meeting completed. You may choose from Transition, Review, Annual or Initial.
 - c. Location: Select the location of the IFSP/IFSP Review Meeting. You may choose from Family Home, Community, Childcare, School or Other.
 - d. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - e. Person Contacted: You may list the person contacted here, if appropriate.

Template: IFSP/IFSP Review- Updated 7.2022

Case Note Details

Individual

* Service Provider

Adusumilli, Jacqueline / Central Office Staff, DC

Service Date 04/18/2022

* Activity Type

- Please Select -

* Location

- Please Select -

Face to Face ☐ Yes ☐ No

Person Contacted

- Please Select / Add New -

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File

Scan File

Note

B	<i>I</i>	<u>U</u>						11pt				
----------	----------	----------	--	--	--	--	--	------	--	--	--	--

2. You are able to add an attachment or additional notes on the main case note screen.

The screenshot displays a web interface for adding attachments and notes. At the top, the 'Attachment(s)' section features a yellow warning box stating 'The total size of all attachments cannot exceed 10 MB'. Below this are 'Add File' and 'Scan File' buttons. The 'Note' section includes a rich text editor with a toolbar containing bold, italic, underline, bulleted list, numbered list, link, and unlink icons, along with a font size dropdown set to '11pt'. The editor area is a large, empty text box. At the bottom of the form, there is a light blue bar with 'Cancel' and 'Back' buttons on the left, and 'Save' and 'Submit' buttons on the right. The 'Submit' button is highlighted with a red circle.


Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Transition:

Required attachments: Signed Opt-Out or LEA Notification, Signed Prior Written Notices, Signed IFSP Consent Page

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Activity Type: You may choose from 2.7 Transition or 2.9 Transition or 2.5 Opt-Out/LEA Notification
 - c. Service Date: The service date for the Opt-Out form is the date it was signed. The service date for the LEA Notification is the date it was sent to the LEA.
 - d. Location: You may choose from Home, Child Care, Community, School, or Other.
 - e. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - f. Person Contacted: You may list the person contacted here, if appropriate.

Template: Transition- Updated 7.2022**Case Note Details**

Individual	
* Service Provider	Adusumilli, Jacqueline / Central Office Staff, DI ▼
Service Date	04/18/2022
* Activity Type	- Please Select - ▼
* Location	- Please Select - ▼
Face to Face	<input type="radio"/> Yes <input type="radio"/> No
Person Contacted	- Please Select / Add New - ▼ 

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File

Scan File

Note

B	<i>I</i>	<u>U</u>							11pt	▼				
----------	----------	----------	---	---	---	---	---	---	------	---	---	---	---	---

2. On the main case note screen, you **must** attach the LEA or Opt-Out Notification form by using the Attachment(s) option. You are also able to add additional notes on this screen.

The screenshot displays a web interface for creating a case note. It is divided into two main sections: "Attachment(s)" and "Note".

The "Attachment(s)" section at the top includes a yellow warning box stating, "The total size of all attachments cannot exceed 10 MB". Below this, there are two buttons: "Add File" and "Scan File".

The "Note" section below features a rich text editor. The toolbar at the top of the editor contains icons for bold (B), italic (I), underline (U), bulleted list, numbered list, decrease indent, increase indent, link, and unlink, followed by a font size dropdown set to "11pt". The editor area is a large, empty text box.

At the bottom of the screen, there is a light blue bar containing four buttons: "Cancel", "Back", "Save", and "Submit". The "Submit" button is highlighted with a red circle.

Once you have completed the case note, select “Save” to save your work and continue adding information, or “Submit” to finalize the case note.

Child Outcomes:

Required attachments: AEPSi Child Progress Record

1. Complete the following:
 - a. Service Provider: This is typically going to be your name.
 - b. Time: List in minutes the length of the child outcomes assessment if you would like.
 - c. Activity Type: Select the type of AEPS completed. You may choose from Entrance, Annual or Exit.
 - d. Face-to-Face: You may choose to indicate if the activity was provided face-to-face.
 - e. Person Contacted: You may list the person contacted here, if appropriate.

Template: Child Outcomes- Updated 7.2022

Case Note Details

Individual

* Service Provider

Adusumilli, Jacqueline / Central Office Staff, DE ▼

Service Date

04/18/2022

* Activity Type

- Please Select - ▼

Face to Face

☐ Yes ☐ No

Person Contacted

- Please Select / Add New - ▼ ⓘ

* Questionnaire

Child Outcome

No Question Answered

Open

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File

Scan File

2. In the Questionnaire, you **must** indicate if the AEPS Progress Record was reviewed with the family by selecting Yes or No. This will replace the required statement in the IFSP.

The screenshot shows a window titled "Answer Questionnaire" with a close button in the top right corner. Below the title bar is a section labeled "Child Outcome". On the left side of this section, there is a search bar with "Filter" and "Reset" buttons. Below the search bar, a question is listed: "1. Was the AEPS Progress Record reviewed with the family?" with a "[Answer Required]" tag. On the right side, the same question is displayed with two radio button options: "Yes" and "No". At the bottom right of the window, there is a "Save" button and a "Close Popup" button, which is circled in red.

Be sure to select "Save and Next" after each question you answer, and "Close Popup" once you've completed the questionnaire.

3. You **must** attach the AEPS Child Progress Record to the Case Note. You may also add additional notes on the main page if you wish.

The screenshot shows the "Attachment(s)" section of a form. At the top, it says "Attachment(s)" with a red asterisk. Below this is a yellow warning box that reads "The total size of all attachments cannot exceed 10 MB". Underneath the warning box are two buttons: "Add File" and "Scan File". Below these buttons is a section titled "Note". This section contains a rich text editor with a toolbar featuring icons for bold, italic, underline, bulleted list, numbered list, link, and unlink, along with a font size dropdown set to "11pt". The text area below the toolbar is empty. At the bottom of the form, there are three buttons: "Cancel", "Back", and "Submit". The "Submit" button is circled in red.

Once you have completed the case note, select "Save" to save your work and continue adding information, or "Submit" to finalize the case note.