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When entering an application into ChildPlus, start by clicking the **Services** Tab. Click **Add Family**, located to the right of the Search field.

There are 5 sections that must be completed for the Application to be considered complete. For clarity, some field definitions are included throughout the manual. Most of the following sections contain **PIR** fields that **must** be completed. In addition to these 5 sections, the application must be signed by the parent and staff member, and uploaded into ChildPlus along with any required documents.

1.) **Family Members:** This is general family information such as name, education, employment, etc.
2.) **Family Information:** This section includes family contact information and many **PIR** fields.
3.) **Family Income:** This section contains Public Assistance, Income and Income Verification information.
4.) **Family Emergency Contacts:** This section is for listing emergency contact information.
5.) **Enrollment:** This section determines all Enrollment information including:
   - Program Term
   - Location Preference
   - Application Information (status, date, eligibility income, etc.)
   - Eligibility Criteria

**NOTE:** This is a one-time opportunity. Once you have saved, you will NOT be able to return to the express Application screen.
Family Members

Select a type of Family Member to add:
- Primary Adult: This is the primary guardian in the family
- Secondary Adult: This is the secondary guardian in the family
- Other Adult: This is any non-guardian adult in the household or family
- Child

Select Applicant or Non-Applicant
Applicant status will only apply to an age eligible child or pregnant woman

If you see this pop-up screen...

All fields marked PIR throughout the entire application must be completed without exception!!
You must take special steps!!
**Possible Duplicate Entry**

- Entering a Name, SSN or Birthday that matches one already in the system will prompt ChildPlus to show the Possible Duplicate window

  - You MUST determine if the information shown in the two windows is the same person.
  - Look closely for misspelled names and transposed letters and/or numbers.
  - Press the triangle UP or DOWN button to cycle through possible matches.
  - **If you are unsure**, you MUST act as though they are the same person.

### Possible Duplicate
This person may already be in ChildPlus.

<table>
<thead>
<tr>
<th>Person already in ChildPlus</th>
<th>Person you are adding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Jimmy Garcia</td>
<td>Name: Johnny Garcia</td>
</tr>
<tr>
<td>Birthday: 12/20/2010</td>
<td>Birthday: 12/20/2010</td>
</tr>
<tr>
<td>SSN: XXX-XX-1196</td>
<td>SSN: - - -</td>
</tr>
<tr>
<td>ChildPlus ID: 111369</td>
<td>ChildPlus ID:</td>
</tr>
<tr>
<td>Family Name: Garcia/Mendoza</td>
<td>Family Name:</td>
</tr>
<tr>
<td>Primary Adult Name: Jessica Mendoza</td>
<td>Primary Adult Name:</td>
</tr>
<tr>
<td></td>
<td>Family Address:</td>
</tr>
<tr>
<td></td>
<td>ChildPlus Family ID:</td>
</tr>
</tbody>
</table>

Is the person you are adding the same as the person already in ChildPlus?

- **Yes, same person**
  - cancel adding
  - go to existing family
  - **If it is the same person:**
    - Click “Yes, same person”. This will take you to the record to begin editing or notify site staff of a transfer request.
    - Verify information such as name, DOB, address and family members between the application and the ChildPlus record to ensure that you are editing the appropriate record.
    - You must proceed to Completing an Application for an Existing Family on page 26.

- **No, not the same person**
  - continue adding new application
  - **If it is not the same person:**
    - Click “No, not the same person”. You may then begin entering the information as usual.
    - You may continue with Entering Applications for a New Family on the next page.

  If you click “No” and the record is a match, you will be required to transfer all information to the original record.

  Please make sure the record is NOT a duplicate!
Family Members Field Exceptions (Fields that might not have to be filled)

- SSN
- Alternate ID
- Other Language
- Other Language Proficiency

Once all fields are completed, select “Add Member” to move to the next person on the application.
Family Information

PIR Fields

1.) Parental Status: One or Two-Parent Family
2.) Primary Language at Home: Actual language spoken in the home
3.) Homeless Family
4.) Active Military
5.) Referred by Child Welfare Agency
6.) Receiving SNAP
7.) WIC (WIC ID not required)

All fields in this section should be completed. If information is unavailable, make certain to document this in the Living Address Notes field. PIR fields must be completed.

**Ensure that you scroll down through all of the fields. DO NOT click Save until you are entirely finished with the application**
Family Income

**Entering Income Information for a New Family**

Each of these fields must be completed, and the Verification Date should match the Eligibility Date within the Enrollment section.

**If you need assistance with Income Calculations, please contact the Central Intake Manager**

Income information should be calculated then entered here. **HOWEVER...** If Homeless, Foster, TANF or SSI, please use $0.00 as the Amount.

**MAKE SURE** this information is correct— it will be used to determine eligibility in the next step!

**Example of Income Documentation in Family Application**

If using Form 5020, the Income Notes must be copied to that module after clicking “Save” at the end of the Application.

Make sure to include a timeframe in your note!

**If you need assistance with Income Calculations, please contact the Central Intake Manager**
The 5020 Module for Income Verification may be needed for certain situations listed below.

1.) Lack of Documentation
2.) Written Statement from Employer
3.) Third Party Providers
4.) No Income
5.) Current Situation
6.) Homelessness

For more instructions see Module Form 5020

Family Emergency Contacts

Click on the Name field.

This will allow access to the remaining fields for data entry.

At least one Emergency Contact is required with a complete name, telephone and address.

Click to enter another Emergency Contact.
Enrollment

**If an application is completed for multiple children, the Enrollment section should be completed for each child.**

Select the Appropriate Program Term.

Select the Funding that Matches the Site.

Complete the fields in these sections according to the Enrollment Field Guide listed below.

This child is eligible to participate in the program

Type of eligibility interview conducted
In-person

Income Status PI
Income below 100%

Documentation used to determine eligibility

Documentation of no income

In-person Telephone

Foster Child
Homeless
Income below 100%
Over Income
Public Assistance
**Enrollment Field Guide**

- **Program Term**: Select the Program Term as defined by the Program (EHS, EHS Exp., EHS State, or HS) and year
  
  + If a program has multiple EHS Program Terms, always use the EHS Program Term

- **Initial Status**: Select New for new applications

- **Status Date**: Input the date the status was made i.e. the date of the application

- **Releases Signed**: Select Yes or No; This includes all Health releases

- **Date Signed**: Date Releases were signed

- **Child will transition to**: Select the School District the child will attend for kindergarten

- **Priority**: List priority of the 1st location. Add others as necessary (See below for instruction)

- **Site**: Select the Site the participant will be attending (if known)
  
  + All Lee’s Summit applications should be placed in the Meadow Lane site

- **Classroom**: Select the Classroom the participant will be attending (if known)

- **Funding**: Select the appropriate Funding (match to the Tier name; MARC is for Tiers 1 & 2)

- **Application Date**: Enter the date the application was signed by the parent

- **Application Status**: Select Incomplete

- **Application Number**: This will be left blank

- **Participation Year**: Enter 1 for new applications; enter 2 if the child was previously enrolled for greater than 60 days; 3 is only used for children completing their 3rd year.

- **Eligibility Date**: Enter the date eligibility was determined. It might be a different date then the actual date the application was taken

- **Number in Family**: Enter the number in the family not household

- **Eligibility Income**: Enter the income listed in the Family Application section if not automatically filled

- **CACFP**: Leave all CACFP information blank

- **Eligible to Participate in Program**: Select Yes or No based on your determination of age eligibility

- **Type of Interview Conducted**: Choose In-Person or Telephone

- **Income Status**: Enter the status associated with the calculated income if not automatically filled. Use the Poverty Level percentage next to the Eligibility Income field as a guide

- **Documentation Used**: Select the type of documentation used to determine income from the dropdown. If Other, type in the documentation used-typically Form 5020

- **Documentation of No Income**: If family had no income, type Form 5020 here
### Adding Multiple Locations

**Click Add Location Preference button**

If known, select the desired Site, Classroom, and Funding. Ensure the funding matches the chosen Site. If Classroom is not known, choose `<No Classroom>`.

Make certain to select the funding that matches the location!
Entering Selection Criteria

Select the appropriate drop down gathered from the parent/guardian during application interview. If at any time you are unsure which selection to make, please refer to the back page of the Selection Criteria Guidelines Worksheet for guidance or contact your Central Intake Manager.

The Eligibility Criteria field will populate based on the Program Term you select. If it does not, you may select the appropriate Eligibility Criteria set from the drop-down menu.

Use this key for choosing the correct Eligibility Criteria.

Federal Early Head Start: Early Head Start Program Year ex. 2018-2019
Early Head Start Expansion: Early Head Start Program Year
State Early Head Start: State EHS Program Year
Head Start: Head Start Program Year

Once an Eligibility Criteria set is selected, points are automatically awarded by ChildPlus based on Income and Class Age.
When entering points, all selections must be noted in the Eligibility Notes field

**Special Needs Eligibility:** If **Multiple Selections** are needed, select the appropriate dropdown.

**Example**

Ensure that the total Special Needs points are placed into the **Adjustment Field**, and all reasons for supporting the points are placed into the **Eligibility Notes** field.

**Parental Eligibility:** Select only one option.
**High Social Service Need Eligibility:** If multiple criteria are required, select the appropriate dropdown i.e. “2 of the Above Choices” for family meeting 2 criteria; “3 of the Above Choices” for 3, etc. ChildPlus will calculate the points based on your selection.

**Example**

If choosing multiples, please place in the Eligibility Notes which criteria were identified.
**Circumstances Affecting Families Eligibility:** If multiple criteria are required, select the appropriate dropdown i.e. “2 of the Above Choices” for family meeting 2 criteria; “3 of the Above Choices” for 3, etc. ChildPlus will calculate the points based on your selection. Please place in the Eligibility Notes which criteria were identified.

**Employment/Training Eligibility:** If multiple criteria are required, select the appropriate dropdown i.e. “2 of the Above Choices” for family meeting 2 criteria;

ChildPlus will calculate the points based on your selection.

**Continuity of Care Eligibility:** Select only one option.
**Transfer Eligibility:** Only to be used during transfer applications. Select only one option.

**Completed Eligibility Criteria Example**
Here is an example of correctly completed Eligibility Criteria. Note the information in the Adjustment Field, and the Eligibility Notes matches the drop down selections.

*Remember:* to make multiple choices where applicable, select the appropriate dropdown, and document the selection in the Eligibility Notes.

If multiple selections are required in **Special Needs Eligibility**, select the **Multiple Selection** dropdown. Calculate the correct number of points awarded for the Special Needs Category*[^1], and place them into the adjustment field. Then place supporting reasons for the adjusted points in the Eligibility Notes field.

*In the example above no Adjustment points were necessary since multiple Special Needs Eligibility were NOT selected.*

Additionally, 1000 points may be added by the grantee only during the transfer process. These points will be removed once the transfer has been completed by the grantee. Please do not make any changes to those points without contacting your supervisor first.

[^1]: Special Needs Category
Immunizations
Do no complete any Immunization Information in this step. All Immunization information will be uploaded according to the Attachment Categories

Saving the Application

Click: “Save and Close”
then proceed to:
Uploading Attachments, Using Flags, and Completing Modules
Completing an Application on an Existing Family in ChildPlus

Family is in ChildPlus, but Applicant is not

When a family is already in ChildPlus, but the applicant is not, you must first add the applicant to the family.

Enter the information, and click OK.

The applicant is now a part of the family.
Family and Applicant are both in ChildPlus

When taking an application on a family already present in ChildPlus, start by clicking the Services Tab. Search for the participant, select the participant and click on Application.

If the child has a previous year’s participation record continue to Adding a Participation Record

If the child does not have a participation record, continue to Making the Applicant a Participant

Making the Applicant a Participant

A family member has a participation record if the icon is green. If it isn’t green a participation record must be added.

NOTE: Anyone who has been enrolled within the current program year should have a current program year Participation Record. If there is already a current program year Participation Record, and they are currently enrolled, do not complete an application, and refer to the program where the child is currently enrolled.

If dropped from program, complete the application, and notify the Central Intake Manager.
Click the More button. Then click Make Participant.

Select the appropriate Program Term. This will allow selection of a location.
Continue to **Fields to be updated for applicants already present in ChildPlus**

If known, select the appropriate Site, Classroom and Funding then click OK. If not known, leave as No Site, No Classroom.

The participation record has been added!

Adding a Participation Record results in a Status of **New**.
Adding a Participation Record

Before you may take an application, there must be a current program year Participation Record.

Click the Add Participation Record button.

Select the appropriate Program Term. This will allow selection of a location.
If known, select the appropriate Site, Classroom and Funding then click OK. If not known, leave as No Site, No Classroom. Select “No” and click “OK”.

The participation record has been added!
Fields to be updated for applicants already present in ChildPlus

Below is a list of fields that should be reviewed and updated for any new applicant who is already in the ChildPlus database. These applicants cannot be added through the “Add New Family” process.

**Application Module**

- **Family Information**
  - Parental Status
  - Number in Household
  - Number in Family
  - Phone Numbers
  - Current Living Address
  - Current Mailing Address
  - Income Verified By
  - Verification Date
  - TANF Status
  - SSI
  - Family Income: see [Adding Another Income Verification](#) for instruction
  - Emergency Contacts and Release Authorizations

- **Individual Information for all family members**
  - Name
  - Birthday
  - Gender
  - Race
  - Hispanic/Latino
  - Release Information
  - Child’s Relationship Status
  - Address
  - Phone Numbers
  - Emergency Contacts and Release Authorizations
  - Agency Specific Fields (Only for applicant)
Adding Another Income Verification

A new income may be needed for many reasons. Some of these include: EHS to HS transition, applications taken after sibling is already enrolled, and re-enrollment within the same program year after being terminated.

This list is not all inclusive, but represents some situations that may occur. Contact the Central Intake Manager if you are unsure about whether to add new income verification.

On the Family Application module, click Family Information.

Then scroll down to section 2, and click “Add another income verification”

Complete all new income information and click Save Changes.

If income information is already present, you must click “Add another income verification” on an existing family, make sure to do it before adding the new Participation Record!

This will copy all of the current income information into the Income Notes. Remember to note which child the copied income information refers to.

A warning will pop-up. Make sure to check the box, then click OK.

NOTE: leaving the box unchecked will still copy the income information to the Income Notes field. However, each field will need to be cleared individually. This increases the risk of data entry errors!
Family Services Module

- Needs Identified
- Services Received

For detailed instructions on how to complete these fields refer to PIR

Enrollment Module

- Program Term
- Application Date
- Application Status
- Participation Year
- Eligibility Date
- Number in Family
- Eligibility Income
- Number in Household
- Child Eligible to participate
- Type of Interview Conducted
- Income Status
- Documentation used to determine eligibility (including Explain field if “Other” is used)
- Eligibility Criteria – All Fields

For detailed instructions on how to complete these fields refer to Enrollment

Finish completing the application process by going to

Uploading Attachments, Using Flags, and Completing Modules
Signing and Uploading the Application

If you clicked “Save, Review and Sign” then ChildPlus will automatically open the report. If this is the case, move to (INSERT LINK)

If you clicked “Save and Close” or completed an application on a family that was already in ChildPlus please follow these steps to access the report.

Accessing the Application Report

On the Application tab, click the Print Application button.

In the Services tab, type the child’s name and press enter. Select the child by clicking on it.

Remember to verify that you have the correct child by using the birthdate or ChildPlus ID.
Opening the Application Report

Fill out these fields as shown.

Select the participant and enrollment record you wish to print.

Multiple participants and enrollment records may be selected at the same time.

Click Preview in the upper right-hand corner.

DO NOT click the Print button.
Signing the Application

Electronic Parent Signature

Once the Preview button is clicked, the report will appear as below.

Click the Parent Signature button.

The signature capture screen will appear.

Have the parent sign their name using a touch screen, touch pad, mouse or signature pad.

Click Accept once the signature is completed, or click Reset to clear the screen. Cancel will stop the process.

Once you click Accept, this screen will appear. Click OK. You will view the attachment in a later step.
Electronic Staff Signature-Eligibility Verification

Click the Staff Signature button.

The signature capture screen will appear.

Sign using a touch screen, touch pad, mouse or signature pad.

Click Accept once the signature is completed, or click Reset to clear the screen. Cancel will stop the process.

Once you click Accept, this screen will appear. Click View Attachment.

Electronic Staff Signature-Application

Clicking “View Attachment” as directed above will bring you to the following screen.
Double click on the Signed Application for the date that you added. Using your external software (Adobe, Nitro, etc.) to digitally sign the PDF file. Save this signed file to a location on your computer where you can easily locate it.

Upload the application that has been signed by both the parent and the intake specialist using the instructions below (Adding Attachments).

Once the application signed by both the parent and intake specialist has been uploaded, delete the application that is signed only by the parent using the instructions below (ADD LINK).

Only the application signed by both should remain at the end of this process.

Managing Attachments
Within most modules, click on the Attachment tab to begin managing attachments. Attachments may include income documents, immunizations, physicals, and many other documents. Please see below for where each type of attachment is categorized.

Adding Attachments

Click the Add Attachment button
A window will open for you to select the file you want to upload.

Be sure to save your documents in a location that you can find them.

Select the file, and click open.
Select the appropriate Service Area.
See the Attachment Categories section to determine where each type of document should be uploaded.

Select the appropriate Attachment Type.
See the Attachment Categories section to determine where each type of document should be uploaded.
Enter the Description

See the Attachment Categories section to determine what description should be used with each type of document.

Notes are not required for attachments.

Click this button for tips on attachments.
**Viewing Attachments**

Select a file using the mouse, and click view. Alternately you may double click the file.

**Editing Details**

Select a file using the mouse, and click Edit Details. The box below will appear, and follows the same guidelines as Adding an Attachment.
Deleting Attachments

Select a file using the mouse, and click Delete. The system will ask you to verify that you want to delete the attachment.

**This action cannot be undone.**

Attachment Categories

<table>
<thead>
<tr>
<th>Application</th>
<th>Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Signed by Staff &amp; Parent Signed ChildPlus Eligibility Verification Proof of Birth/Proof of Pregnancy Proof of Residence Custody Documents</td>
<td>ALL Income Documentation Forms 5020 (if sibling) Forms 5170 (if paper copy needed)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance Card Physical Exam Dental Exam Health Information Exchange Release of Information Health History &amp; Nutrition Assessment (if paper copy needed) Lead &amp; Hemoglobin Screening Results Immunizations Individual Health Care Plan (IHCP) Asthma Action Plan (AAP)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individualized Education Plan (IEP) Individualized Family Service Plan (IFSP)</td>
</tr>
</tbody>
</table>
Using the Flag System

Use a purple flag when a member of the **intake team** uploads a health document in ChildPlus

From the health module, select the Flags icon

Select the appropriate flag and enter notes
During the application process

If a family indicates that a child might have a chronic health condition, but a written plan from the physician and/or medication has not been received, the intake team will use a red flag.

Select the appropriate flag and enter notes

If the participant is a pregnant woman, select the pink flag
If a family indicates that the child has a suspected disability, use the yellow flag.

If a family provides a copy of the IFSP or IEP, upload to the Disability Module in ChildPlus and use the green flag.
Module Form 5020
If using Form 5020 Income Verification, the following module must be completed. The reasons for using Form 5020 Income Verification are:

1.) Lack of Documentation
2.) Written Statement from Employer
3.) Third Party Providers
4.) No Income
5.) Current Situation
6.) Homelessness

Once the application has been saved complete the module using the following instructions.

If Application is saved by clicking Save and Close, you may complete Form 5020 prior to having the parent sign electronically.

If the Application is save by clicking Save, Review and Sign, have the parent electronically sign the application prior to completing Form 5020.

To complete the Form 5020 Income Verification Module, click:

- Enrollment
- Form 5020 – Income Verification
- Add Form 5020 – Income Verification
Complete this module according to the instructions included in the module itself. If you have questions regarding how to complete a certain field, please contact the Central Intake Manager.

Once complete, and signed by the parent and staff, click Save. The module may also be printed, or saved as an attachment and emailed to a parent.
Fill out the fields that apply to the situation including income, timeframe, support, etc. Enter the reference information into the module as well. If a reference is refused, document that within the module.

If income is zero, you must enter zero to save the form.

Income notes entered into the Application section must be copied into this section.
Once the parent has signed the document, the staff member must verify the information, and complete the verification section of the module.

Reopen the module by double clicking on record you need to change.

Complete this section.

Click Save at the top of the module to complete this process.
Health and Nutrition Assessment Module

At the time of application:

- The Health History and Nutrition Assessment module will be completed by the intake team.

This is available in the Health Module for each child and then select the age appropriate assessment.

Complete all cells as you would the paper form of the Health and Nutrition Assessment making sure to enter notes and explanations for any identified concerns.

- Once complete, Parent/Guardian and staff completing the assessment signs to acknowledge the Year 1 information.

Once you have selected the age appropriate assessment, you will select the green ‘Add Health and Nutrition Assessment’ button to begin entering data.
At time of intake and during the review and update process for returning children, when determining the health needs of each participating child, the Portrait of a Healthy Child (PoHC) will be used to provide education and guidance for meeting the health requirements.
Needs identified and goals developed must be documented in ChildPlus in the Portrait of a Healthy Child (PoHC) module within the Family Services section.

Each child should have their own ChildPlus PoHC module within Family Services.

Go to Family Services and select the Portrait of a Healthy Child module.

Select Add Portrait of a Healthy Child
Complete information:

- Person Completing the PoHC at intake-select the name of the person
- Program Contact Person-if known, select the name of the person.
- Phone Number of Contact Person-if known, enter phone number
- Child’s Name as entered in ChildPlus
- Goal 1-select from the dropdown menu. If options do not reflect the goal, select Other
- If Other is selected from the dropdown menu, enter a brief description. A more detailed description will be entered in Notes.
- Complete By-Select the date the family indicates they will meet the goal
- Date Started-the date Intake Specialist met with family and developed goals
- Status of Goal 1-select the status Goal 1 Started
- Notes-date stamp and enter notes that clearly reflect specific information about the goals developed to meet health requirements and follow up contact. Develop notes using SOAP style documentation.
  - S-Subjective O-Objective A-Assessment P-Plan
- Signature-parent/guardian signs to acknowledge agreement

Dropdown choices for goals
Print and attach to the PoHC document for the family to take with them.
PIR and Family Services

PIR Information

Access the PIR by clicking Family Services>Family Services Information, and scrolling down the screen.

The Intake Team should not complete the fields in these sections.
It is important that **ALL** PIR information have matching documentation within the Family Service Event area!!

Select “Yes” in the appropriate fields of this section.

<table>
<thead>
<tr>
<th>Need PIR Services Identified</th>
<th>PIR Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency PIR</td>
<td></td>
</tr>
<tr>
<td>Crisis Assistance PIR</td>
<td></td>
</tr>
<tr>
<td>Food PIR</td>
<td></td>
</tr>
<tr>
<td>Clothing PIR</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
</tr>
<tr>
<td>Housing Assistance PIR</td>
<td></td>
</tr>
<tr>
<td>Mental Health Services PIR</td>
<td></td>
</tr>
<tr>
<td>Literacy or Education</td>
<td></td>
</tr>
<tr>
<td>English as a Second Language PIR</td>
<td></td>
</tr>
<tr>
<td>Adult Education PIR</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Need PIR Services Identified</th>
<th>PIR Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Training PIR</td>
<td></td>
</tr>
<tr>
<td>Substance Abuse Prevention PIR</td>
<td></td>
</tr>
<tr>
<td>Substance Abuse Treatment PIR</td>
<td></td>
</tr>
<tr>
<td>Child Abuse and Neglect Services PIR</td>
<td></td>
</tr>
<tr>
<td>Domestic Violence Services PIR</td>
<td></td>
</tr>
<tr>
<td>Child Support Assistance PIR</td>
<td></td>
</tr>
<tr>
<td>Health Education (including Prenatal) PIR</td>
<td></td>
</tr>
<tr>
<td>Assistance to Families of Incarcerated PIR</td>
<td></td>
</tr>
<tr>
<td>Parenting Education PIR</td>
<td></td>
</tr>
<tr>
<td>Marriage Education PIR</td>
<td></td>
</tr>
<tr>
<td>Asset Building Services PIR</td>
<td></td>
</tr>
</tbody>
</table>
Entering Event Details

Click the “Add Event” button and select the Liaison event. For information on Home Visit entry, visit page 34.

Every field must be completed for each event. Proceed through the manual for instructions for each field.

Each event will remain open for an entire program year. For example, there will be a single event for attendance for the entire program year. This event will not close until the end of the year, and all progress will be tracked under actions.
Determining Event Type

Liaison:
This event type is used once per program year for each content area. Intake specialists will only complete events for the Family Engagement and PIR content areas.

Initial Date

Description

Descriptions for each event should be filled using the following list. Descriptions should be followed exactly.

- PIR (Year)
  - Ex. PIR 2018-2019
- Family Engagement (Year)
  - Ex. Family Engagement 2018-2019

Service Area
**Determining Service Area**

Each Service area corresponds to a different content area. Select the Service Area that most closely matches the item you are entering.

When documenting in Family Services:

- **Always** look to document in the Liaison: PIR event first.
- If it does not fit in that category, then move to Liaison: Family Engagement.

**Liaison: PIR:**

Use this Service Area when documenting work related to the PIR content area. For example, documenting a PIR Services Received such as Crisis Assistance or Asset Building Services. Remember, Services Received should only be marked yes if the family has received the service.

**Liaison: Family Engagement:**

Use this Service Area when documenting referrals which are in addition to the documentation needed to support a “Yes” in a PIR field.

**Home Based Home Visit:**

Will never be used by the intake team.

**Liaison: Disabilities:**

Will never be used by the intake team.

**Liaison: Education:**

Will never be used by the intake team.

**Liaison: ERSEA:**

Will never be used by the intake team.

**Liaison: Health:**

Will never be used by the intake team.

**Liaison: Mental Health:**

Will never be used by the intake team.

**Issue**

Select the appropriate Issue
**Determining Issue**

Each Service Area has a specific set of Issues that are only available when the correct Service Area has been selected. If the Issue for the event being entered is not found, **reassess the Service Area selected.**

**Examples of Service Areas and matching Issues**

**PIR**
- Event: Liaison
- Service Area: PIR
- Issue: PIR

**Family Engagement**
- Event: Liaison
- Service Area: Family Engagement
- Issue: Referrals

Remember: Case noting occurs in the action for each event. It is important to include detailed information in each action. See [Adding an Action](#) for more detailed instruction.

**Source of Information**

Select the appropriate individual from the drop-down menu. This will be the person who shared the information.
**Associated With**
Select whether this event is associated with an individual participant, or the entire family. The Liaison event default to associated with the entire family.

**Case Worker**
Select the appropriate Agency Worker from the drop-down menu. This will be your name and will auto populate if the case worker field is completed in the Family Information section.

**Family Members:**
Type in the family members involved in the event. This is a limited text field. If there are many names, abbreviations may be necessary, and all names may not fit.
Progress

Select the appropriate level of completion from the drop-down menu. Events should remain open for the entire year. When the program term has ended, or when the event is truly completed then the progress may be changed to “Completed”. For example, a Transition event might be “Completed” in April, because the child transitioned from EHS to HS that month. However, the Attendance event would remain open until the program term is over, and records are being cleaned up.

Date Closed

Type or choose from the drop down the date that the event was completed. If the event has not yet been completed, leave this field blank.

Please enter at least one Action before the event is saved.
Adding an Action

Every field must be completed for each action. Proceed through the manual for instructions for each field.

**REMEMBER:** Every event **MUST** have at least 1 associated Action!

Click the “Add Action” button.
Action Type

Select the appropriate Action Type

If Referral is chosen, additional fields will be available, and must be completed. If the action is not a referral, proceed to Scheduled Date on the next page for instructions.

Referred To

Select the Referral agency from the drop down list
Referral Type

Scheduled
Enter the date that the action is scheduled to occur

Action Date
If the action is completed, enter the date that the action occurred
Type of Contact

Select the appropriate Type of Contact

Description

Type in a description of the action
**Status**

![Image of Add Action form](image)

**Determining Status**

Any Status preceded by “Home Based:” is **ONLY** to be used by home-based staff for documentation of home visit attendance.

Any other status should be chosen based on the action taking place. The options are:

- Action Completed
- Awaiting Feedback

**Agency Worker**

Select the Agency Worker who is responsible for the action. This defaults to the Case Worker listed in the Family Information section.
**Action Notes**

Enter the S.O.A.P. note for each action in the Action Notes field. S.O.A.P. notes should include the Who, What, Why, and When. For assistance with S.O.A.P. notes, contact your Family Engagement content lead.

Click either “Save” button