

Education General Information - ChildPlus Instructions

Education Information Tab

Enter yourself as Responsible Staff under Education Information tab. Your name will auto-fill on the event data entry screens. **Make sure the current participation record is highlighted.**

Application Enrollment Family Services Health Immunizations Disability Mental Health **Education** Attendance PIR

Events Requirements **Education Information** Attachments (6) PICCOLO (Home Visitors Only)

Responsible Staff

Participation Records

Current Year	ECEAP 2020 - 2021	Enrolled 9/28/20	East Port Orchard ECEAP • EPO ECEAP

Requirements Tab

This tab provides information related to 30, 45 and 90 day program requirements.

Requirements Refresh

Due In	Due Date	Education Event	Event Date	Days Since Entry	Days Until Due	Requirement Status	Expiration Date	Days Until Expiration	Event Status
30	10/27/20	CB 1st Education Home ...	9/17/20	0	0				Completed (at site or oth...
45	11/11/20	Developmental Screening	10/30/20	33	0				No Concerns
45	11/11/20	Social Emotional Screeni...	1/01/21	96	0	Comp. Late			DECA Strategies Needed

Events Tab

The basic process for entering Events in ChildPlus is:

- Click Add Event. Select the Event. Enter Event Date. Enter Status. Enter Agency Worker (will auto-fill when you enter yourself as Responsible Staff under Education Information tab).
- If status = No Concerns, save event and done.
- If the event status requires follow up of any kind specific to the event, this is entered in Actions.
(Never document follow up under event notes.)

Options Add Event

Add Education Event

- Developmental Screening
- Education Home Visit
- Education Parent Conference
- EHS Transition Plan
- Incident and Illness Report
- Individual Learning Plan (ILP)
- Positive Behavior Support Plan
- Social Emotional Screening

Cancel

Developmental Screening (ASQ-3)

Click Add Event. Select Developmental Screening.

Data Entry Requirements:

- Event Date: Date screening was completed.
- Status: Select Entered with IEP/IFSP (when obtained and not speech or communication only), Failed Needs Referral, Failed Needs Rescreen or No Concerns.
- Event Notes: Enter a brief summary of who you met with, the results of the screening, conversation with family about any follow up needed. Document strategies provided to work on specific skills. Document next steps agreed upon during this meeting. See example below.
- Add Action: Document all on-going conversations and rescreen/referral follow up in Add Action. See examples below.
- Closed Date: When the event needs follow up for a rescreen or referral, enter closed date after all follow up is completed. (To Do lists will not track pending follow up if event is closed prior to follow up completed.)

Developmental Screening

The screenshot shows the 'Developmental Screening' form with the following fields and callouts:

- Scheduled Date:** A date picker showing 1/22/21.
- Event Date ^{PIR}:** A date picker showing 1/22/21.
- Status:** A dropdown menu with options: No Concerns, Entered with IEP/IFSP, Failed, Needs Referral, Failed, Needs Rescreen, and No Concerns. A callout points to 'Entered with IEP/IFSP' with the text: 'Status of Entered with IEP/IFSP can only be selected when the current IEP/IFSP is obtained within 30 days. If not obtained, Developmental Screening is required within 45 days. When the obtained IEP/IFSP is for speech or communication only, Developmental Screening is required within 45 days.'
- Description:** A text area containing the same options as the Status dropdown.
- Agency Worker:** A text field containing 'Sandeno, Karen'.
- Needs:** A list of checkboxes: Referral, Follow-Up Assessment - C.27a ^{PIR}, Formal Evaluation - C.27a ^{PIR}, and Treatment. Callouts point to 'Follow-Up Assessment' and 'Formal Evaluation' with the text: 'Click Follow-Up Assessment when Status is Failed, Needs Rescreen' and 'Click Formal Evaluation when Status is Failed, Needs Referral'.
- Closed Date:** A date picker showing 3/22/21. A callout points to it with the text: 'When the event needs rescreen or referral, enter closed date after all the follow up is completed.'
- Event Notes:** A text area containing the example note: '1/22/2021 4:42 PM Karen Sandeno Met with mom and dad via zoom. Child scored low in fine motor. Talked about rescreen in 8 weeks. Reviewed Fine Motor Learning Activities and parents chose to work on stacking blocks and drawing. Parents had no questions. Additional learning activities will be provided throughout the month.'
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

Communication	Cut-off Category
0	
Gross Motor	Cut-off Category
0	
Fine Motor	Cut-off Category
0	
Problem Solving	Cut-off Category
0	
Personal-Social	Cut-off Category
0	

Data enter ASQ score and select Cut-off Category.

Attach ASQ Summary and Questionnaire report under Education tab for each completed ASQ Screening.

Add Action for ongoing conversations and follow up steps/actions/activities.

Actions

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

Add Action

Save

Cancel

Note: Make sure ASQ follow up action aligns with ChildPlus event status.

ChildPlus Event Status	ASQ Portal Follow Up Action Taken (check the box)
Failed, Needs Referral	Refer to early intervention/early childhood special education
Failed, Needs Rescreen	Provide activities and rescreen in [2] months.
No Concerns	No further action taken at this time

Data Entry for Actions:

- Enter brief, informative descriptions.
- Add ongoing conversations as Communication Actions.
- Add rescreen(s) and/or referral as Follow Up Actions.
 - When rescreen is still in the grey area, discuss with coach and supervisor to determine if action next step is a 2nd rescreen or a referral. If child is still below cut off after two rescreens, child needs referral.
 - If family does not want to move forward with a referral, discuss with coach and supervisor how best to support family. Status of Internal Referral Action is Parent Refusal. Close event. Document continued support to family under Disability tab. See example below.
 - Remember to check to see that PIR C27a box is checked.
 - Remember to close the event once all follow up is completed.

Actions

Add Action

Action	Action Date	Description	Status	Agency Worker
Follow Up	3/22/21	Internal Referral	Action Completed	Sandeno, Karen
Follow Up	3/15/21	Rescreen Fail	Action Completed	Sandeno, Karen
Communi...	3/01/21	confirm rescreen	Action Completed	Sandeno, Karen
Communi...	2/03/21	learning activities	Action Completed	Sandeno, Karen

These are the examples of Action Notes from the above list of Actions:

Action Notes



2/3/2021 4:08 PM Karen Sandeno Spoke with mom today about how things are going with stacking and drawing. Emailed mom ASQ activity report and discussed other fun strategies that support fine motor skills.

Action Notes



3/1/2021 4:10 PM Karen Sandeno Confirmed with mom through email exchange that zoom rescreen meeting is scheduled for 3/15/21 at 2pm. Sent mom zoom link.

Action Notes



3/15/2021 4:36 PM Karen Sandeno Needs referral. Rescreen scores are: Communication 55. Gross Motor 35. Fine Motor 10. Problem Solving 60. Personal Social 55. Discussed referral process with mom and sent her the consent form for completion.

Action Notes



3/22/2021 4:39 PM Karen Sandeno Parent consent received and is attached. Disability Manager notified. This event closed. See Disability tab for further information and follow up.

This is an example of the 3/22/21 Action if the parent was not interested in moving forward with a referral. The developmental screening event would be closed and all continued support for the family will be documented under Disability tab, IEP or IFSP Add Activity.

Action Type

Follow Up

Scheduled Date



Action Date ^{PIR}

3/22/21



Description

Internal Referral

Status

Parent Refusal

Action Notes



3/22/2021 4:39 PM Karen Sandeno Parent refusal form completed and attached. Disability Manager notified so that disability concerns can be opened. This event closed. See Disability tab for further information.

This is any example of a Disability Add Activity note.

Note

3/22/21

3/22/2021 2:49 PM Karen Sandeno Disability Manager will open concern for developmental delays in communication skills. Parent is not interested in referral at this time. I will support family with various strategies and check in the parent periodically to see if there are any changes.

Social Emotional Screening (DECA)

Click Add Event. Select Social Emotional Screening. Social Emotional Screenings are required each assessment period for all participants.

Data Entry Requirements:

- Event Date: date the screening was completed.
- Status: Select DECA Strategies Needed (when screening results show need), Failed Needs Referral (when needs mental health referral) or No Concerns.
- Description: Type Pre DECA, Mid DECA or Post DECA according to the Fall, Winter or Spring assessment period when screening is completed.
- Event Notes: Enter a brief summary of who you met with, the results of the screening, conversation with family about any follow up needed. Document strategies provided to work on specific skills. Document next steps agreed upon during this meeting. See example on page 6.
- Add Action: Document all on-going conversations and referral follow up in Add Action. See examples on page 6.
- Closed Date: Enter closed date when all follow up is done or when the assessment period ends. For example, the Pre DECA status was DECA Strategies Needed. When the Mid DECA is completed, close the Pre DECA event and continue any Pre DECA follow up under Mid DECA event. For returning children, make sure the Post DECA from the previous year is closed.

Add Social Emotional Screening

Scheduled Date: [Calendar icon]

Event Date ^{PIR}: 2/25/21 [Calendar icon]

Status: [Red circle with slash icon] [Dropdown menu]

Description: [Dropdown menu]
DECA Strategies Needed
Failed, Needs Referral
No Concerns

Agency Worker: Sandeno, Karen

Closed Date: [Calendar icon]

Options:
☐ Referral
☐ Follow-Up Assessment - C.27a ^{PIR}
☐ Formal Evaluation - C.27a ^{PIR}
☐ Treatment

Callout boxes:
- Social Emotional Screening required each assessment period for all participants.
- Do not check when following up on DECA Strategies Needed.
- Check Formal Evaluation C27a when Failed, Needs Referral
- When DECA Strategies Needed, must follow up a minimum of 3 times to check in on how strategies are working, suggest new ones, etc. Document in Add Action.
- Note: Needing support with strategies does not mean child needs mental health referral.
- Enter Closed Date when all the follow up is completed or assessment period ends.
- If it appears that child needs a referral based on social emotional screening, it is important to review all health and education screenings and discuss your concerns with your coach and supervisor. If referral is needed, follow mental health procedure.

Event Notes



1/1/2021 2:43 PM Karen Sandeno Met with dad via zoom. Child scored low in Initiative and Self Regulation. Went over strategies selector with dad, focusing on self regulation. Dad wants to focus on getting organized ahead of time and making a cozy space. Screen shot of home strategies emailed to dad.

I.N.
Need

S.R.
Need

A.R.
Typical

T.P.F.
Typical

B.C.
Typical

Data enter DECA rating.

Attach DECA Single Rating Report and Parent Letter for each completed screening and Pre-Post Comparison Report at the end of the year. Attach these reports under Education tab.

Add Action for ongoing conversations and follow up steps/actions/activities.

Add Action

Actions

Action	Action Date	Description	Status	Agency Worker
Communi...	3/30/21	Strategy Check In	Action Completed	Sandeno, Karen
Communi...	3/01/21	Strategy Check In	Action Completed	Sandeno, Karen
Communi...	2/15/21	Strategy Check In	Action Completed	Sandeno, Karen

Save

Cancel

Data Entry for Actions:

- Enter brief, informative descriptions.
- Add ongoing conversations and follow up on DECA strategies as Communication Actions.
- Add a referral as Follow Up Action.
- Remember to close the event once all follow up is completed or assessment period ends.

These are the examples of Action Notes from the above list of Actions:

Action Notes



2/15/2021 2:47 PM Karen Sandeno Phone call with mom and dad. Child doing really well in the cozy space. Will check in again in two weeks.

Action Notes



3/1/2021 10:34 AM Karen Sandeno Zoom with mom, dad and child so they could show me child's progress on self regulation. We agreed that no new SR strategies needed. Parents will continue with the routines and activities they have been doing. Reviewed strategy selector for Initiative. Parents will focus on giving choices.

Action Notes



3/30/2021 10:55 AM Karen Sandeno Phone call with mom. She requested the full list of suggested home strategies for Initiative to help them with ideas. Emailed this info to mom. Scheduled the next screening for 04/30/21 at 9am.

Individual Learning Plan (ILP)

- Three times per year (for each assessment period). They are called out as Individual Learning Plan Fall, Spring, Winter.
- Add Action to document follow up and progress. Here you will put all documentation towards goal. **Never document follow up and progress in event notes.**
- Event Notes: Click Clock. Enter a brief statement of the goal.
- Closed Date = end of assessment period or date ILP goal met if prior to end of assessment period.

Preschool part day ILPs 3 times after each assessment and meeting with family. Individualizing on lesson plan based on ILP goals. ILP goals based on assessment data.

Full year to 4 assessments, meaning 4 ILPs, add event for Summer

Drop down for ILP focus – use ELOF or other domains. To check more than one needs to be checkbox

Experience/activities at home and for classroom?

Minimum of 3 actions documenting follow up for each ILP

See j acker for samples

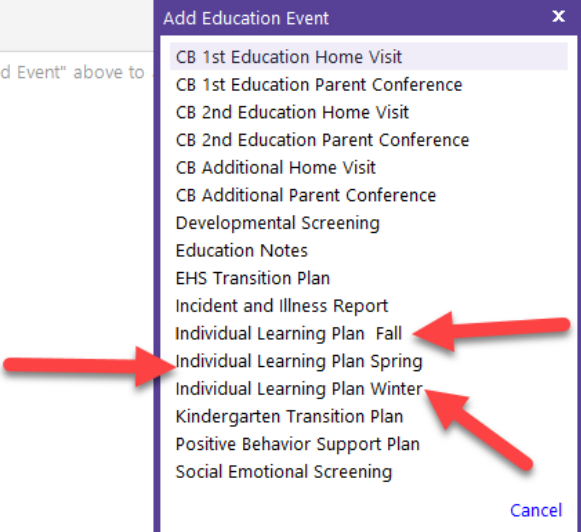
Note: If a goal is achieved quickly (within 2 weeks), Add Action to document, close the ILP and open a new one. Enter Event Notes on this new ILP to explain why there is an “extra” ILP in addition to a brief statement of new goal.

Application Enrollment Family Services Health Immunizations Disability Mental Health Pregnancy Transportation Education Fees Attendance PIR

Events Requirements Education Information Attachments (0) PICCOLO (Home Visitors Only)

Education Events Options Add Event Add Multiple Events

Exp.	Event Type	Date	Status		Needs Eval.	Needs Tx	Received Tx
No health events have been entered for this individual. Click "Add Event" above to				<div><div>Add Education Event</div><ul style="list-style-type: none">CB 1st Education Home VisitCB 1st Education Parent ConferenceCB 2nd Education Home VisitCB 2nd Education Parent ConferenceCB Additional Home VisitCB Additional Parent ConferenceDevelopmental ScreeningEducation NotesEHS Transition PlanIncident and Illness ReportIndividual Learning Plan FallIndividual Learning Plan SpringIndividual Learning Plan WinterKindergarten Transition PlanPositive Behavior Support PlanSocial Emotional Screening<div>Cancel</div></div>			



Add Individual Learning Plan Fall



Event Date PIR

Status

Completed

Agency Worker

Closed Date

This event is not considered for requirements because of its status.

Event Notes

🕒

ABC

🖨

✎

📄

↗

Actions

Add Action

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

Save and Add Another

Save

Cancel Add

Center Based Education Home Visit

The education visits/conferences that count as Education Home Visit are:

- Initial Contact (1st CB Education Home Visit) due within 30 days of enrollment – this is required for all children regardless of what time of year they enroll.
- Winter visits/conferences (2nd CB Education Home Visit)

Per Head Start and ECEAP performance standards required to do 2 visits, 2 conferences. If visit not at home, event notes need to explain where and why not at home.

If home visit does not happen, the Education notes will show attempts to schedule, no show or whatever happened that led to not completing the visit.

Data Entry Requirements:

- Scheduled Date == optional if you want to enter the schedule date when scheduled with the family
- Event Date = date Education Home Visit is completed
- Status: enter appropriate choice. Education Home Visits can occur outside the home as arranged with the family.
- Event Notes: explain why not completed at home. What else
- Add Action to document any follow up, as needed. *Never document follow up in event notes*

Quick note?

What goes in actions for visits and/or conferences?

Referencing to other events that are completed?

Remove reference to 1st and 2nd for home visits and conferences

Internal monitoring for coaches??

Monitoring checklist would be for classroom level

Would there be something in personnel?

Maybe a tab under management to create custom form, follow up area

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education Fees Attendance PIR

Events Requirements Education Information Attachments (0) PICCOLO (Home Visitors Only)

Education Events

Exp.	Event Type	Date	Status
	Developmental Screening	3/12/20	Failed, Needs Referral
	Developmental Screening	1/09/20	No Concerns
	Developmental Screening	11/21/19	Failed, Needs Rescreen
	Social Emotional Screening	3/12/20	No Concerns
	Social Emotional Screening	11/21/19	No Concerns

Options Add Event Add Multiple Events

Add Education Event

CB 1st Education Home Visit
CB 1st Education Parent Conference
CB 2nd Education Home Visit
CB 2nd Education Parent Conference
CB Additional Home Visit
CB Additional Parent Conference
Developmental Screening
Education Notes
EHS Transition Plan
Incident and Illness Report
Kindergarten Transition Plan
Positive Behavior Support Plan
Social Emotional Screening

Cancel

Add Education Home Visit

Event Date PIR

Status

Agency Worker

⊘ This event is not considered for requirements because of its status.

Event Notes

Actions

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

Save and Add Another Save Cancel Add

Center Based Education Parent Conference

The education conferences that count as Education Parent Conference are:

- Fall conferences (1st CB Education Parent Conference)
- Spring conferences (2nd CB Education Parent Conference)

Data Entry Requirements:

- Event Date = date of the conference.
- Status: enter Completed at site or other location.
- Add Action to document any follow up, as needed. *Never document follow up in event notes*

Application	Enrollment	Family Services	Health	Immunizations	Disability	Mental Health	Birth	Transportation	Education	Fees	Attendance	PIR
Events	Requirements	Education Information	Attachments (0)	PICCOLO (Home Visitors Only)								

Education Events

Options

Add Event


Add Multiple Events

Exp.	Event Type	Date	Status		Needs Eval.	Needs Tx	Received Tx
	Developmental Screening	3/12/20	Failed, Needs Referral	<div>Add Education Event</div> <div> <div>CB 1st Education Home Visit</div> <div>CB 1st Education Parent Conference</div> <div>CB 2nd Education Home Visit</div> <div>CB 2nd Education Parent Conference</div> <div>CB Additional Home Visit</div> <div>CB Additional Parent Conference</div> <div>Developmental Screening</div> <div>Education Notes</div> <div>EHS Transition Plan</div> <div>Incident and Illness Report</div> <div>Kindergarten Transition Plan</div> <div>Positive Behavior Support Plan</div> <div>Social Emotional Screening</div> </div> <div>Cancel</div>			
	Developmental Screening	1/09/20	No Concerns				
	Developmental Screening	11/21/19	Failed, Needs Rescreen				
	Social Emotional Screening	3/12/20	No Concerns				
	Social Emotional Screening	11/21/19	No Concerns				


Add Education Parent Conference









Event Date ^{PIR}

Status 
Completed (at site or other location)
Completed (in the home)

Agency Worker

 This event is not considered for requirements because of its status.

Event Notes      

Actions

[Add Action](#)

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

[Save and Add Another](#)

[Save](#)

[Cancel Add](#)

Add Action



Action Type

Communication
Evaluation
Follow Up
Referral
Treatment



Agency Worker
Provider
Provider Type
Funding
Cost

0

☐ Treatment Received for a Diagnosed Chronic Condition C.8.a1 ^{PIR}

Treatment received for specific conditions C.9 ^{PIR}

☐ Anemia ☐ Asthma ☐ Hearing Difficulties ☐ Vision Problems ☐ High Lead Level ☐ Diabetes

Action Notes

ABC ✓

Add any follow up information
or documentation here.

Save and Add Another

Save

Cancel Add

Incident and Illness Report – no change. Email stand alone to Erin

The Incident and Illness Report form has been created as an Event in ChildPlus. Depending on the computer screen, you may have to keep scrolling down to get to it.

- Event Date = date of the incident or illness report.
- Status = Completed. Do not leave blank.
- Data is entered from the completed Incident and Illness Report form.

Add Incident and Illness Report



Event Date ^{PIR}

Status

Report Type

Date of Incident/Illness

Time of Incident/Illness

Taken to Clinic/Hospital

☐ Called Poison Control ☐ Called 911 ☐ Contacted Parent

Type of Injury/Incident

☐ Scratch ☐ Open Wound/Cut ☐ Sprain/Strain/Twist ☐ Pain/Inflammation/Bump ☐ Respiratory Condition

☐ Allergy/Sensitivity Reaction ☐ Broken Bone/Fracture ☐ Loss of Consciousness ☐ Dislocation ☐ Burn

Other

☐ Poisoning ☐ Seizure

Body Parts Affected

☐ Head/Face ☐ Ears ☐ Eyes ☐ Nose ☐ Mouth/Teeth ☐ Toes ☐ Legs/Knees ☐ None

Other

☐ Arms/Elbows ☐ Hands/Wrist ☐ Fingers ☐ Adbomen

☐ Hip/Pelvis ☐ Chest/Shoulders ☐ Feet/Ankles ☐ Groin ☐ Buttocks ☐ Torso/Side ☐ Neck ☐ Back

Where Incident/Injury Occurred

☐ Art Center ☐ Bathroom ☐ Discovery/Science Center ☐ Dramatic Play ☐ Library Center ☐ Listening Center

☐ Sensory Center ☐ Toys/Games Center ☐ Writing Center ☐ Playground

Other

Cause of Injury/Incident

☐ Slip or Trip ☐ Struck by Object ☐ Overexertion ☐ Fall ☐ Bite/Scratch/Kick ☐ None/Unknown

Other

☐ Fire ☐ Electricity ☐ Chemicals ☐ Structures/Surfaces

☐ Left Side of Body Affected ☐ Right Side of Body Affected

First Aid Given

List Names of staff present and/or witnesses



Please give a brief summary of incident/illness



Parent/Guardian Contacted

☐ In Person ☐ By Phone ☐ By Email

Date Contacted

Time Contacted

Name of person who filled out the form

Actions

Add Action

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

Save and Add Another

Save

Cancel Add

Kindergarten Transition Plan

- Kindergarten Transitions will happen during Winter conferences (2nd CB Education Home Visit) for those children that will be attending Kindergarten the following Fall. You will upload the Kindergarten Transition form under attachments and document the conversation under Action.
- Never document follow up in event notes

Add Kindergarten Transition Plan

Event Date PIR

Status

Agency Worker

Agency Worker Should auto fill. If not fill in with your name.

⊘ This event is not considered for requirements because of its status.

Event Notes

Actions

Add Action

Action	Action Date	Description	Status	Agency Worker
--------	-------------	-------------	--------	---------------

This event has no actions associated with it. Click "Add Action" to add one.

Save and Add Another

Save

Cancel Add

Add Action:

Add Action



Action Type

Agency Worker

Provider

Provider Type

Funding

Cost

☐ Treatment Received for a Diagnosed Chronic Condition C.8.a1 ^{PIR}

Treatment received for specific conditions C.9 ^{PIR}

☐ Anemia ☐ Asthma ☐ Hearing Difficulties ☐ Vision Problems ☐ High Lead Level ☐ Diabetes

Action Notes



Action Notes should include conversation with parent, also include any follow up needed.

Save and Add Another

Save

Cancel Add

Uploading Kindergarten Transition form

You will scan your document and follow the instructions below to attach it in ChildPlus

- Education
- Attachments
- Add Attachment

Application Enrollment Family Services Health Immunizations Disability Mental Health Birth Transportation Education Fees Attendance PIR

Events Requirements Education Information Attachments (0) PICCOLO (Home Visitors Only)

Education

Add Attachment Edit Details View Delete

EHS Transition Plan

- Click on Education tab
- Click on Add Event
- Choose EHS Transition Plan

Review transition policies and procedures for transitioning children from Early Head Start. **This must begin 6 months prior to the child's third birthday.** *Never document follow up in event notes*

Events

Requirements

Education Information

Attachments (0)

Education Events

Options

Add Event

Add Multiple Events

Exp.	Event Type	Date	Status	Needs Eval.	Needs Tx	Received Tx
	Developmental Screening	6/14/18	Entered with IFSP			
	Education Home Visit	11/05/18	Completed (in the home)			
	Individual Learning Plan (ILP)	11/05/18	Completed (in the home)			

Add Education Event

Developmental Screening

Education Home Visit

Education Parent Conference

EHS Transition Plan

Incident and Illness Report

Individual Learning Plan (ILP)



Positive Behavior Support Plan



Social Emotional Screening


Cancel



Add EHS Transition Plan









Event Date ^{PIR}  



Status  

Agency Worker 

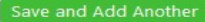


Closed Date  

Event Notes

Actions  

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

- “Event Date” is the date that you start the transition
- “Status” ***In Process*** while you are working on the transition. “Status” is changed to ***Completed*** once the transition is completed
- “Actions” All events or conversations that are relevant to the child’s transition
- “Closed Date” is transition is completed

First example: Add Action

^ v eye print

Action Type

Scheduled Date

Action Date PIR

Description

Status

Communi...

12/21/18

visit site

Action Completed

Agency Worker

Provider

Provider Type

Durbin, Lidie

Action Notes

12/21/2018 9:02 AM Lidie Durbin
Visited Madrona classroom and met with teacher. Family liked how the classroom was set up and thinks that their child would really like this site.

Save and Add Another Save Cancel Add

Second Example: Add Action

^ v eye print

Action Type

Scheduled Date

Action Date PIR

Description

Status

Communi...

12/25/18

phone call to site

Action Completed

Agency Worker

Provider

Provider Type

Durbin, Lidie

Action Notes

12/25/2018 9:05 AM Lidie Durbin
Called Madrona advocate and discussed the families insight on classroom and next steps in transition

Save and Add Another Save Cancel Add

Successful Entry Example:

Actions

Add Action

Action	Action Date	Description	Status	Agency Worker
Communi...	12/21/18	visit site	Action Completed	Durbin, Lidie
Communi...	12/21/18	phone call to site	Action Completed	Durbin, Lidie

Save and Add Another Save Cancel Add

Education Notes

The intent of the Education Notes is to capture education related conversations and actions when the Education Event has not occurred yet. For example, ... examples of what to do, and/or what not to do.


Click Education tab. Click Events tab. Click Add Event. Select Educations Notes. Data Enter:

- Event Date (Date you are setting up the event for the program term) Never enter more than one Education Note event per program term.
- Status (**Do not leave blank**. Status Completed is required to set up this event)
- Description (Always the current program term. For example, 2020-2021)
- Agency Worker

Only one Education Notes event is added per program term. All notes that need to be entered under this event are entered under "Add Actions"


Add Education Notes

Event Date PIR

Status 

Description

Agency Worker

 This event is not considered for requirements because of its status.

Event Notes

Actions

Action	Action Date	Description	Status	Agency Worker
This event has no actions associated with it. Click "Add Action" to add one.				

Add Action

Save and Add Another

Save

Cancel Add

To add to Education Notes during the year, **DO NOT** create another event. Click on the existing Education Notes Event. Click Add Action button.

Add Action

Action Type

Scheduled Date

Action Date PIR

Description

Status

Communi...

Agency Worker

Provider

Provider Type

Action Notes

🕒

ABC

🖨️

✍️

📄

↗️

Click the clock

Save and Add Another

Save

Cancel Add

Select Action Type. Data Enter: Action Date, Description, Status, and Agency Worker, **Click the Clock** and add Action Notes.

Notes: Descriptions for each Add Action should be specific. There are limitations on how much can be written in this section.

- Conversations about Child Development
- Items shared related to Child Development
- Family Conversations

These notes here are only for conversations etc that do not “belong” to an event.