I-TEAMS MANUAL

Effective December 2023
Version 5 (corresponding with I-TEAMS release 8.6)

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CHAPTER 1: I-TEAMS OVERVIEW

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

1.0 I-TEAMS Overview

Infant-Toddler Electronic Administration and Monitoring System (I-TEAMS) is the Arizona Early Intervention Program's (AzEIP's) designated data system for all children involved with AzEIP. It is a web-based application which allows Arizona Department of Economic Security (ADES/AzEIP), as well as its contractors and service providing agencies, including the Arizona State Schools for the Deaf and the Blind (ASDB) and the ADES/Division of Developmental Disabilities (DDD), to manage child record data for children referred to and eligible for AzEIP. System integration has been implemented with other agencies like Arizona Department of Health Service (ADHS) and Arizona Department of Education (ADE) for data linking features.

1.1 System Summary

The I-TEAMS application will support the following functionalities:

Organization and Employee:

1. Add and manage organizations and contracts.
2. Add and manage employees.
3. Record Professional Provider's information.
4. Create and Manage Banner messages.
5. View system Alerts.
6. View list of assigned children to Providers.

Child Record:

1. Referral.
2. Locate child records.

3. Child Demographics information.
4. Contract and Team member assignment.
5. Insurance Consent.
6. Eligibility information.
7. Screening Information.
8. IFSP information.
9. Service Delivery.
10. Transition.
11. Transfer child record to new region.
12. Child indicator information.
13. Compliance decisions.
14. Exit record.
15. Invoice/Billing/Payments.
16. TPL information.
17. Reversals.
18. Reports.
19. Data Upload.

1.2 User Access Levels

I-TEAMS uses a role-based access control approach which restricts system access only to authorized users. Access levels and permissions in I-TEAMS are determined by the roles assigned to the user. Only specified webpages will be displayed for an individual user based on their assigned role. User roles are assigned by an Admin Role. AzEIP contractors, DDD and ASDB all have their own Admin Roles.

1.3 Using the System

The I-TEAMS application can be accessed via any web browser however Internet Explorer and Google Chrome are the recommended browsers for I-TEAMS.

I- TEAMS URL is:

https://azeip.azdes.gov/AzEIP/AzEIP_ITEAMS/Account/Login.aspx

Review and Click on **Agree** button from **User Agreement** page to access the I-TEAMS **Login** page. Enter **Username** and **Password** to login to I-TEAMS. DES User logins will be the employee's D0 or C0 number and their Window's password. All other users have a login created by their agency's admin with all alpha characters.

The user will see I-TEAMS Home Page when logged into I-TEAMS successfully. The Home Page displays the full name of the user with a welcome message to the AzEIP

I-TEAMS application.

1. The header displays:
   A. DES Logo.
   B. Links including About DES, Services, Contact us, Document Center, Media Center, Find your local office, Job openings.
   C. I-TEAMS Help Desk contact details.
   D. Full name of the user.
   E. Log Out.
2. The left navigation pane displays links to different I-TEAMS pages based on the role and permission of the user.
3. All Banner messages will be displayed in the middle of the Home Page.
4. The My Alerts, My Children, I-TEAMS User Manuals, My Reports, Data Upload, Reversals links are located at the middle of the Home Page.

1.4 Accessing Child Record

Access to a child record is based on a user's role and permissions. For example, a Professional Provider will see all children assigned to the user whereas a Contract Admin will see all children assigned to their Contract. A user can access a child's record in several ways.

1. Access child record via My Children link:

   A user will only see children who have been assigned to him/her. A user can access their My Children page either from the Home page or from the left navigation pane. The specific child record will need to be selected before I-TEAMS will navigate the user to the Demographics page of that child record.

2. Access child record via Locate Child page link:

   A user can search for a child record using any combination of available search field choices. This page allows users to search with partial values (for example the first few letters of child's name can be used) to check for multiple potential matching child records. Search results may be displayed if there is a match. The specific child record will need to be selected before I-TEAMS will navigate the user to the Demographics page of that child record.

3. Search by child's I-TEAMS ID

   A user can enter child's I-TEAMS ID in the Child ID field located in the top left side of the I-TEAMS Home Page and then click on Go. If authorized to have access to that child's record, I-TEAMS will navigate the user directly into the Demographics page for that specific child's record.

1.5 Point of Contact

For questions/concerns with the I-TEAMS Application, please contact: I-TEAMS Help Desk:

Phone: (602) 279-8043

Email: AZEIPITEAMS@azdes.gov AzEIP Office: Phone: (602) 532-9960

1.6 Acronyms and Abbreviations

Abbreviation	Definition
ACP	Address Confidentiality Program
ADHS	Arizona Department of Health Services
ADE	Arizona Department of Education
AHCCCS	Arizona Health Care Cost Containment System
AKA	Also known as
ALTCS	Arizona Long Term Care System
ASDB	Arizona State Schools for the Deaf and the Blind
AzEIP	Arizona Early Intervention Program
EIP	Early Intervention Program
DES	Department of Economic Security
CPS	Child Protective Services(aka Arizona Department of Child Safety or DCS)
DCS	Arizona Department of Child Safety
DDD	Division of Developmental Disabilities or DDD State Funds only
DSI	Developmental Special Instructionist
HRA	Health Reimbursement Account
HSA	Health Savings Account
IFSP	Individualized Family Service Plan
ISP	Individualized Service Plan
I-TEAMS	Infant Toddler Electronic Administration and Monitoring System
LTC	Long Term Care
OT	Occupational Therapist
PEA	Public Education Agency
PT	Physical Therapist
PWN	Prior Written Notice
RSK	Raising Special Kids
SC	Service Coordinator
SLP	Speech Language Pathologist
TPL	Third Party Liability
TSC	Targeted Support Coordination

CHAPTER 2: GETTING STARTED

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

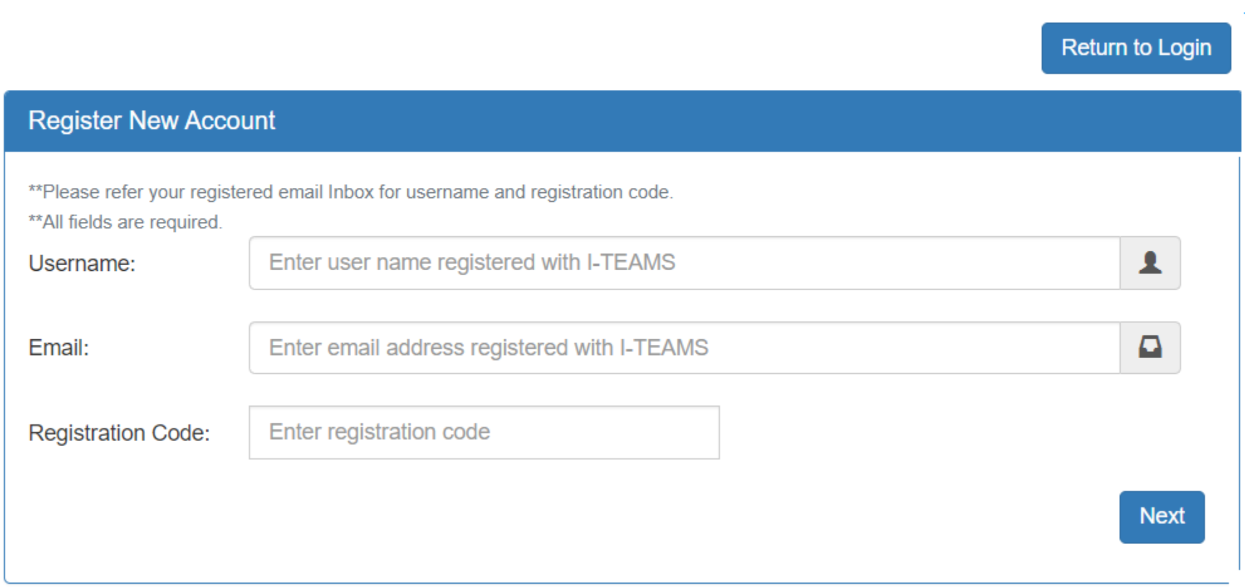
2.0 Getting Started

The I-TEAMS application can be accessed using any web browser using URL below:
https://azeip.azdes.gov/AzEIP/AzEIP_ITEAMS/Account/Login.aspx

2.1 Register Here

All Non-DES I-TEAMS users - AzEIP contractors, ASDB, and Central Referral Staff (Raising Special Kids) have to register successfully to be able to login to I-TEAMS. DES employees are not required to register in I-TEAMS.

User will receive an automated email from AzEIPITEAMS@azdes.gov with their username and registration code upon the creation of a user profile in I-TEAMS by the administrator.



Steps to Register New Account

Note: Each field with an asterisk (*) is required.

1. Click on Agree from the User Agreement page.
2. Click on Register Here.
3. *Enter Username.
4. *Enter Email.
5. *Enter Registration Code.
6. Click on Next
7. *Enter Password.
8. *Re-enter password on Confirm Password field.
9. Click on Next.
10. *Select Security Question 1.
11. *Enter Answer.
12. *Select Security Question 2.
13. *Enter Answer.
14. Click Register.
15. User will get the message "User Registration is Successful"

2.2 Log In

Non-DES employees can login to I-TEAMS once the user profile is created by admin and successful user registration is complete. DES employees can login to I-TEAMS with their Active directory credentials (D#).

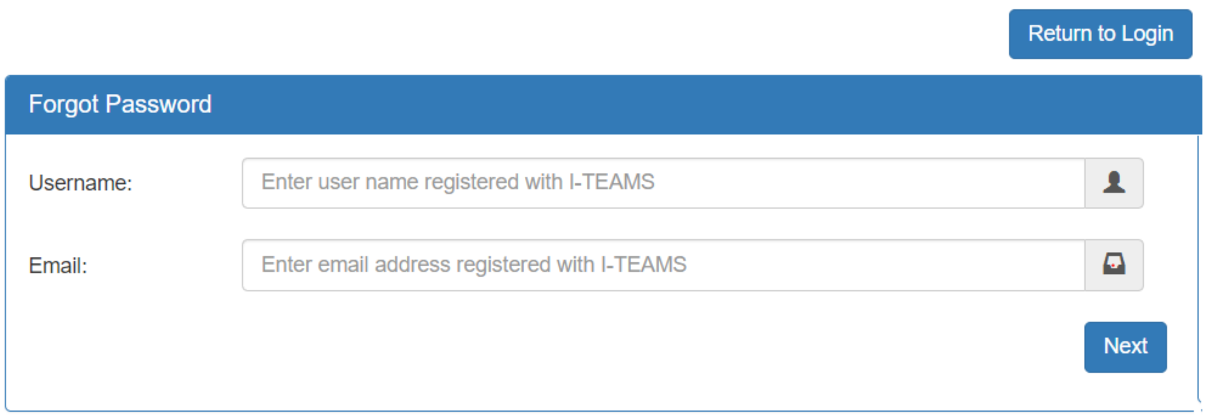
Steps to Login to I-TEAMS

1. Click on https://azeip.azdes.gov/AzEIP/AzEIP_ITEAMS/Account/Login.aspx
2. Click on Agree.
3. Enter Username.

4. Enter Password.
5. Click on Login.

2.3 Forgot Password

Only users who are not DES I-TEAMS members can utilize this feature to reset their password. DES employees will contact their Technical Support team to manage or change passwords.



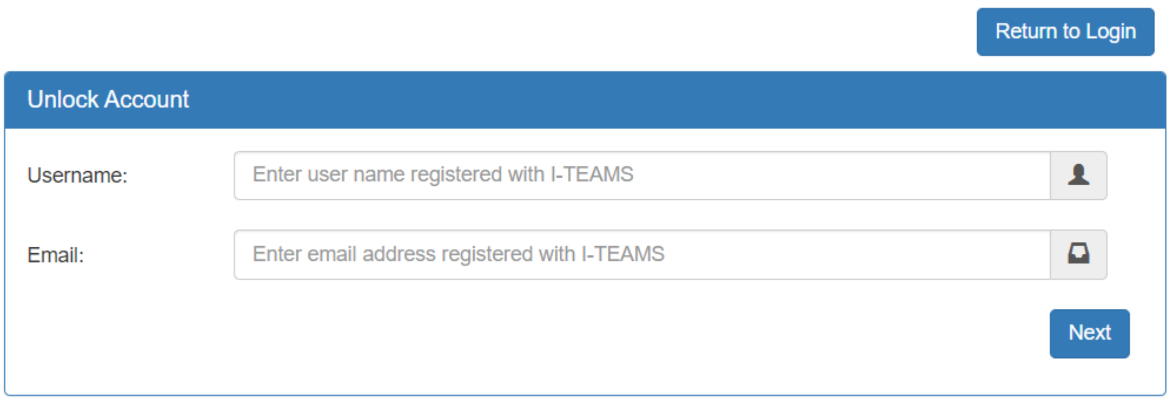
Steps for Forgot Password

1. Click on Agree from the I-TEAMS User Agreement page.
2. Click on Forgot Password.
3. Enter Username.
4. Enter Email.
5. Click on Next.
6. Enter Answer to security question 1.
7. Enter Answer to security question 2.
8. Click on Next.
9. Enter New Password.
10. Confirm password.
11. Click on Reset password.
12. The user will get the message “Password updated successfully”.

2.4 Unlock Account

Only users who are not DES I-TEAMS members can utilize this feature to unlock their I-TEAMS account. If a user attempts to login with an invalid username or password more than three times, their user account will be locked out.

DES employees will contact their Technical Support team to manage their account.



Steps to Unlock Account

1. Click on Agree from the I-TEAMS User Agreement page.
2. Click on Unlock Account.
3. Enter Username.
4. Enter Email.
5. Click on Next.
6. Enter Answer to security question 1.
7. Enter Answer to security question 2.
8. Click on Unlock Account.
9. User will get the message “Account Unlocked successfully”.

2.5 Forgot Security Q&A’s

Only users who are not DES I-TEAMS members can utilize this feature to reset their Security questions and answers.

Steps to Reset Security Questions

1. Click on Agree from the I-TEAMS User Agreement page.
2. Click on Forgot Security Q&A's
3. Enter Username.
4. Enter Email.
5. Click on Generate One-Time Passcode.
6. User will get the message "One-time passcode has been sent to your registered Email ID. Please enter the one-time passcode here. The one-time passcode will expire in 1 Hr."
7. Go to the Inbox of the email account which is registered in I-TEAMS.
8. Look for the email with header AzEIP I-TEAMS: Your One-Time Passcode
9. Copy your one-time passcode.
10. Go back to I-TEAMS and enter One-Time passcode.
11. Click on Next.
12. Select Security Question 1.
13. Enter Answer.
14. Select Security Question 2.
15. Enter Answer.
16. Click on Submit.
17. User will get the message "Security questions are updated successfully".

2.6 Log Out

The user must always logout of I-TEAMS to successfully close previously open sessions completely and securely. The Log Out link is located on the top right of the I-TEAMS screen next to the user's name and on the bottom of the left navigation pane.

The system will time out after 20 minutes and if the user attempts to click on another link after that time, will need to log-in again to refresh or go to another page.

CHAPTER 3: REFERRAL

REVISION DATE: December 2023

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INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

3.0 Referral

Any individual can submit a referral to connect a child and family with the AzEIP system. Children from Birth through 2 years and 10.5 months old can be referred to AzEIP via AzEIP Central Referral (via online, fax or phone), ADES/AzEIP, DDD or ASDB. The URL to AzEIP's Online Referral Application is:

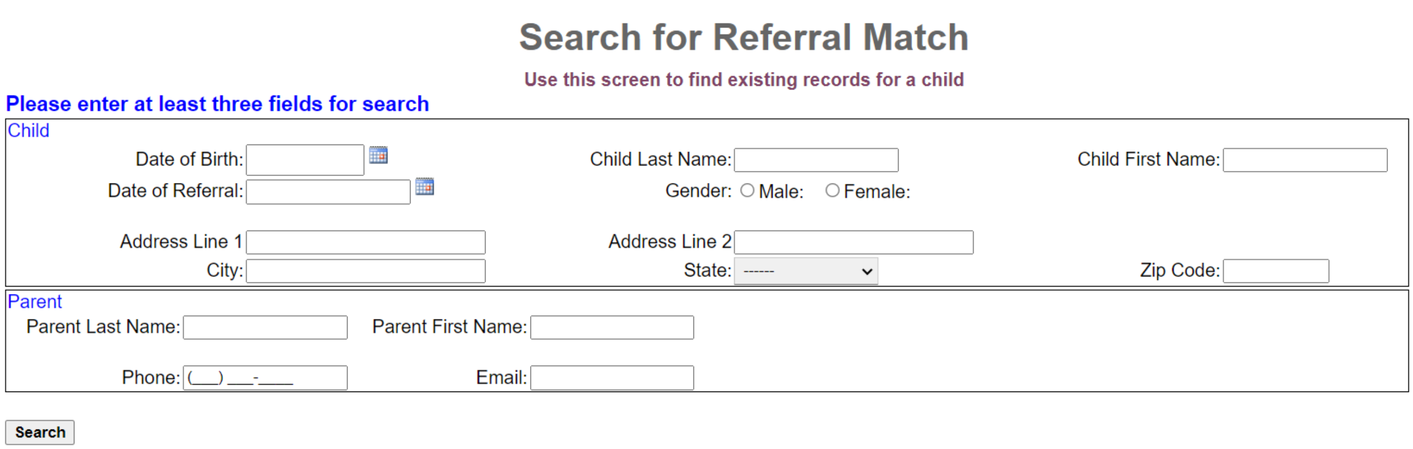
https://azeip.azdes.gov/AzEIP/AzeipRef/Forms/Categories.aspx

The Central Referral Phone: (602) 635-9799

Spanish: (602) 635-9810
Toll Free: (888) 592-0140
E-mail: azeip.info@raisingspecialkids.org

3.1 Search for Referral Match

It allows users to determine if a child record already exists in I- TEAMS when a referral is received. Search for Referral Match must be performed upon receiving a referral to decide whether the referral is to be processed as a brand-new referral or a re-referral.


Search for Referral Match
Use this screen to find existing records for a child
Please enter at least three fields for search
Child
Date of Birth:
Child Last Name:
Child First Name:
Date of Referral:
Gender: Male: Female:
Address Line 1
Address Line 2
City:
State: ------
Zip Code:
Parent
Parent Last Name:
Parent First Name:
Phone: (___) ___-____
Email:
Search

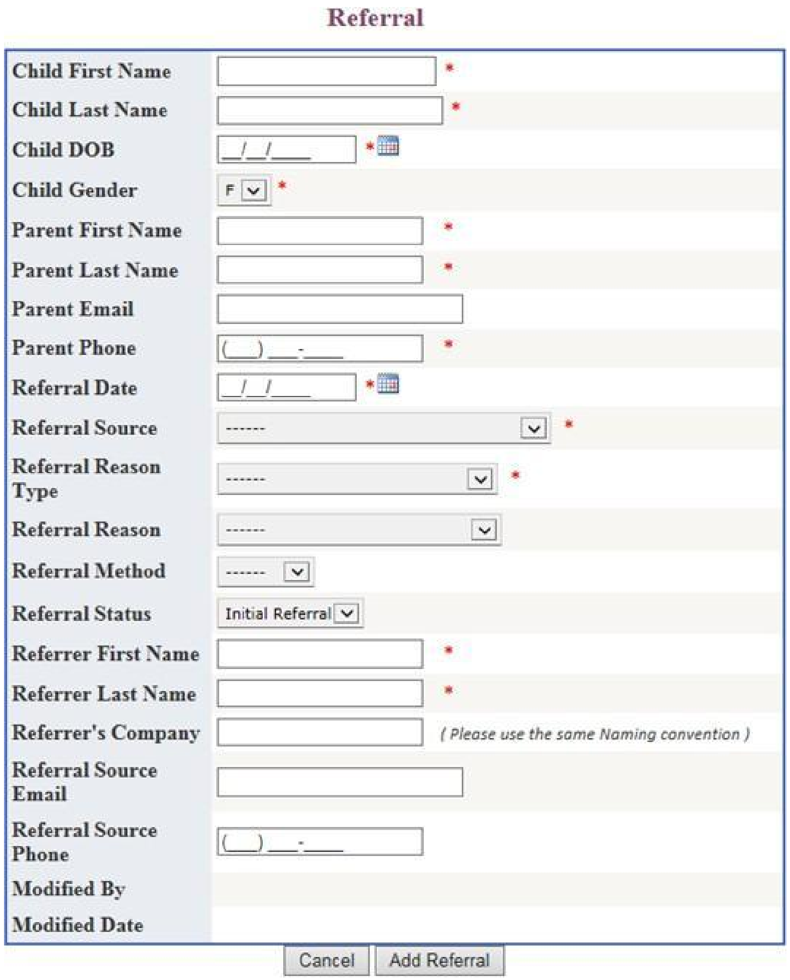
Steps to Search for Referral Match

Note: This allows users to search with partial values (for example the first few letters of a child's name can be used) to check for multiple potential matching child records.

1. Click on Search for Referral Match link on left navigation pane.
2. Enter at least three values.
3. Click on Search.
4. Click on Open / Pending / Transfer/ Exited under Status to view the record in detail.
5. Click on Service Coordinator to view the name and phone number of assigned Service Coordinator of the child.
6. Click on Available Address to view the address of Parent1.
7. If Search for Referral Match yields no results, search for child again by changing at least one of the three values or entering a new value.
8. Click on Search.
9. Follow Steps 4-6 above as needed.
10. If Search for Referral Match again yields no results, assume the child has never been referred to AzEIP and proceed to Add New Referral.

3.2 Add New Referral

This allows users to enter a new referral to I-TEAMS which will create a new I-TEAMS record for the child. AzEIP Central Referral users adds new referrals to I-TEAMS.



Steps to Add New Referral

Note: Each field with an asterisk (*) is required. This section is only used for RSK.

1. Click on Add New Referral link on left navigation pane.
2. *Enter Child First Name.
3. *Enter Child Last Name.
4. *Enter Child DOB.
5. *Select Child Gender.
6. *Enter Parent First Name.
7. *Enter Parent Last Name.
8. Enter Parent Email.

9. *Enter Parent Phone.
10. *Enter Referral Date.
11. *Select Referral Source.
12. *Select Referral Reason Type.
13. Select Referral Reason.
14. Select Referral Method.
15. Select Referral Status.
16. *Enter Referrer First Name.
17. *Enter Referrer Last Name.
18. Enter Referrer's Company.
19. Enter Referral Source Email.
20. Enter Referral Source Phone.

Note: Double check the accuracy of all referral information especially Child's name, DOB and Gender before proceeding to avoid duplicate records.

21. Click on Cancel to erase all the information entered.
22. Click on the Add Referral.
23. System will perform a search for existing records that have the same Child First Name, Child Last Name, Child DOB and Child Gender that were entered in the Add New Referral page.
24. If the system does not find a possible match, the record will be added successfully.
25. If the system does find a possible match, Child ID, Name, DOB, Gender, Status of the record (Open/Exited) and Adult Name will be displayed at the bottom of the page with message "Possible matches are found for the child".
26. If the record has a status of Exited, user will see the Add New Referral. Click on Add New Referral to open the record as re-referral keeping same I-TEAMS ID of the first referral. Record will have new Referral Date entered in Referral page.
27. If the record is Open, the user will see the Add Subsequent button. Click on Add Subsequent to add parent details to existing parent details in Child Demographics page and Referral page for open records.

3.3 Manage Referral

Manage Referral page allows users to access the referral page of a child record to modify basic referral information and add/remove/edit referral source address. Users can access Referral page via Referral page link from Additional Data section at the bottom of the child record.

Steps to Manage Referral

1. Click on Manage Referral link on left navigation pane.
2. Click on Select to view referral page of a child record in detail.
3. Click on Edit Referral to modify the information.
4. Click on Update Referral to save the modified information.
5. I-TEAMS keeps the history of the changes made to referral page. Modified By will be updated with the name of the user who edited the referral page and Modified Date will be updated with the date when the changes were made.
6. Click on Child Demographics to go to Child Demographics page.
7. Referral Source Address can be added/updated/removed at the bottom of the referral page.

   Note: Please enter a full and accurate address including Apartment or unit number (when applicable), accurate zip codes and correct spelling of street names.

   A. Enter Address, City, Zip Code and Address Type.

   B. Click on Add.

   C. Select correct address from the Address Verification pop-up window.

   D. Click on Save Chosen Address to save address successfully.

   E. User can click on Edit to update the address or click on Delete to remove the address.

CHAPTER 4: CHILD

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4.0 Child

I-TEAMS allows users to access child records and view system generated alerts to perform or complete tasks timely based on the user's role.

4.1 My Alerts

I-TEAMS generates automatic alert notifications to specific users that certain activities need to occur to ensure that those activities are processed correctly and timely. Depending on the user role, different users will see different Alerts. Below are descriptions of the system generated Alert Messages.

Alert Message	When Alert is Issued	User receiving Alert
Professional license expires for professional provider	Before License Expiration Date	Professional Provider
Evaluation not conducted 30 calendar days after referral	If Eligibility Decision Date is not entered after 30 calendar days after referral days	Service Coordinator
Evaluation not conducted 40 calendar days after referral	If Eligibility Decision Date is not entered after 40 calendar days after referral days	Service Coordinator
Assign Service Coordinator to child	More than two days past initial referral date	Referral intake users
Service coordinator must meet with family	Within seven days from the initial referral date	Service Coordinator
Exit Date not entered	At child's third birthday	Service Coordinator

Children assigned to Service Coordinator	When child record is assigned to the Service Coordinator	Service Coordinator
New IFSP created Annually	1 month before annual IFSP is due	Service Coordinator
Initial IFSP not entered 30 calendar days after referral	If Date of IFSP is not entered after 30 calendar days after referral	Service Coordinator
Initial IFSP not entered 40 calendar days after referral	If Date of IFSP is not entered after 40 calendar days after referral	Service Coordinator
IFSP Transition Planning meeting due	If IFSP date is entered and the DOB is between 1 year 11 months to 2 year 10 months and 15 days	Service Coordinator
Transfer notification - transferred to user	When record is transferred	Contract Admin of new Program
Transfer notification - transferred from user	When record is acknowledged	Contract Admin of sending Program
Date consent to use insurance provided	One month before one year after date of consent	Service Coordinator & Contract Admin
A new child is assigned to your contract region	When a new referral is assigned to the contract	Contract Admin
Entry Child Indicator Summary due	Child Indicator Summary Date of Entry Rating not entered if initial IFSP date is entered	Service Coordinator
Exit Child Indicator Summary due	At 2 years and 9 months (2.9)	Service Coordinator
Your Invoice for the month of [0] has been Reviewed.	When Invoice is reviewed	Contract Admin & Finance
Units exceeding IFSP Units have been entered, which are Non-Billable	When excess IFSP units have been entered	Contract Admin & Finance

Steps to manage Alerts

1. Click on My Alerts link from either Home Page or left navigation pane.
2. My Alerts page will display Child ID, Child Name, Alert Message Due Date and name of the user alert is sent to.

3. Click on Select to open a child record and perform necessary action.

4.2 My Children

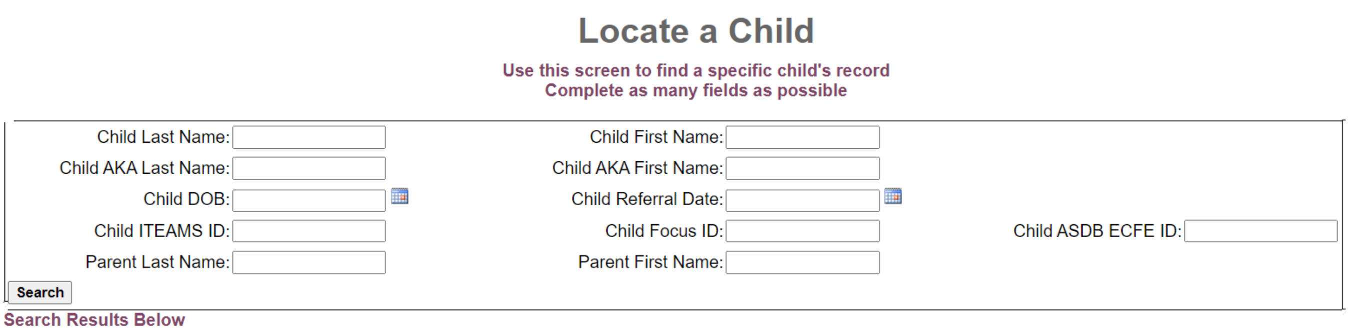
The My Children page is an easy way to see list of all children assigned to a user and access individual child records. The user will only see children that have been assigned to them. For example, a Professional Provider will see all children assigned to them whereas a Contract Admin can see all children assigned to their contract.

Steps to access My Children

1. Click on My Children either from the Home Page or from the left navigation pane.
2. Click on Last Name, First Name, Date of Birth, Gender, Status or Status Date to sort the list of children.
3. Click on Select to open a child record.

4.3 Locate Child

A user can search for a child record by child name, DOB, I-TEAMS ID or parent name etc. Search can be performed by any combination of available fields.



Steps to Locate Child

1. Enter any combination of available search fields.

   Note: Partial values will yield search results in select fields. For example, entering the following Last Name: “Mo” First Name: “Mi” will result in a list of names matching those values.

2. Click on Search.

3. Search results will be displayed below the search area with Child ID, Referral Date, Child Last Name, Child First Name, Child DOB, Child Gender and Child Record Status.
4. Click on page numbers to navigate to the next page of search results.
5. Click on Column Title to change sorting order.
6. Click on Select to view brief child record details.
7. Click on Child Demographics to open a child record.

CHAPTER 5: MY REPORTS

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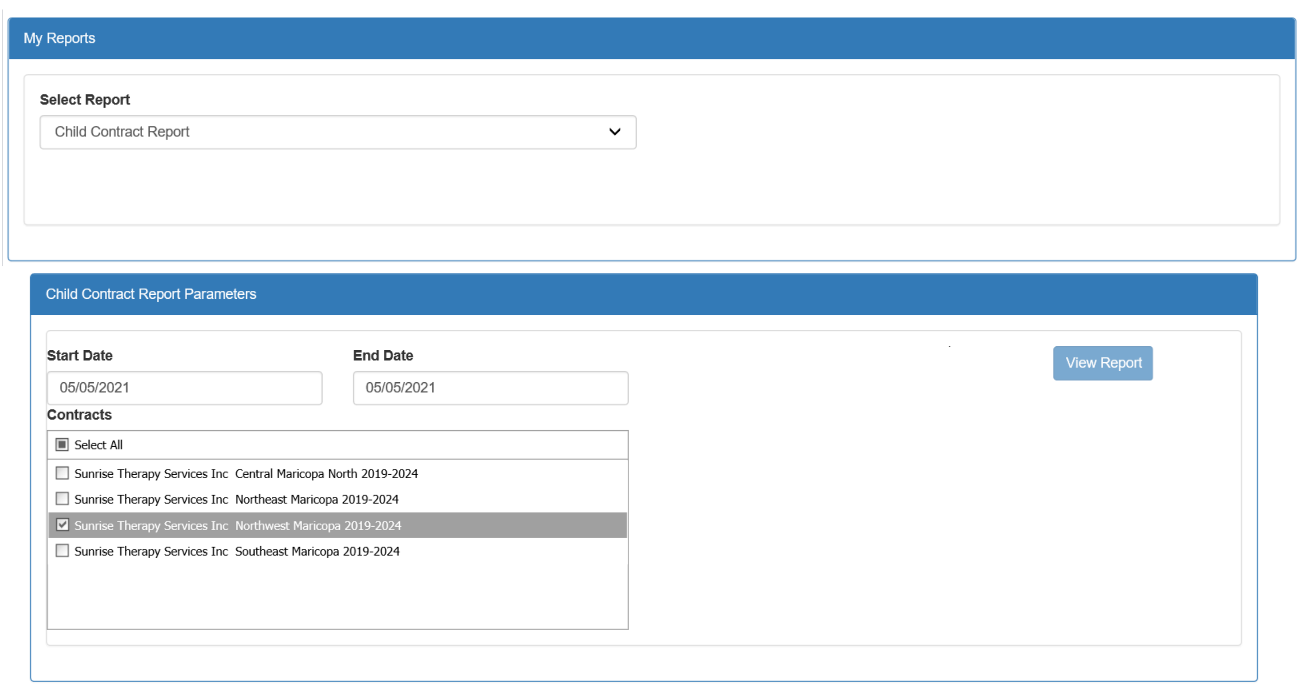
5.0 My Reports

My Reports feature allows users to run, customize and download different reports anytime. These on demand reports can be accessed through the My Reports section of I-TEAMS located on the Home Page. The reports are generated in an Excel format.

5.1 Child Contract Report

Child Contract Report gives child demographic, referral, eligibility, transition, exit, and team assignment details for children with an open I-TEAMS record. Report is recommended to run for only one day (Today).



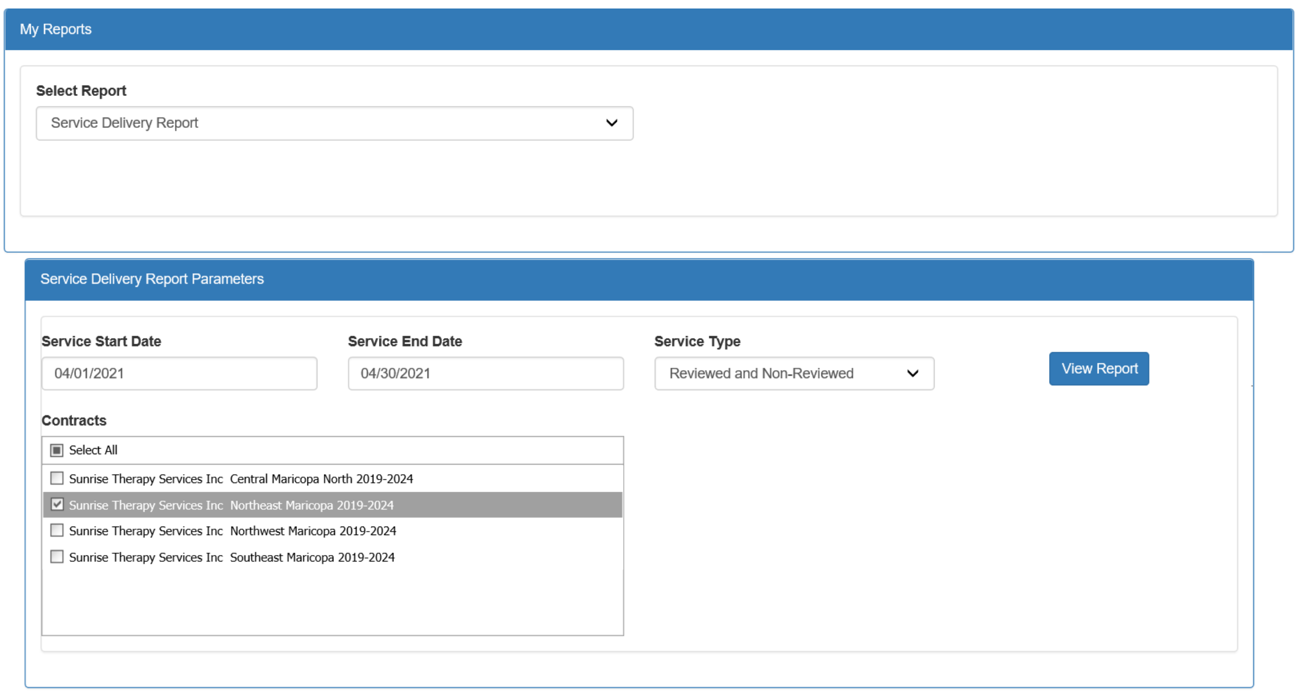
Steps to run Child Contract Report

1. Click on My Reports from the Home Page.

2. Select Child Contract Report.
3. Select Start Date.
4. Select End Date.
5. Select Contracts.
6. Click on View Report.
7. Click on Open or Save to view or download the report.

5.2 Service Delivery Report

Service Delivery Report provides detailed information for all service deliveries entered, including status and invoice information. Report can be run for 3 calendar months.



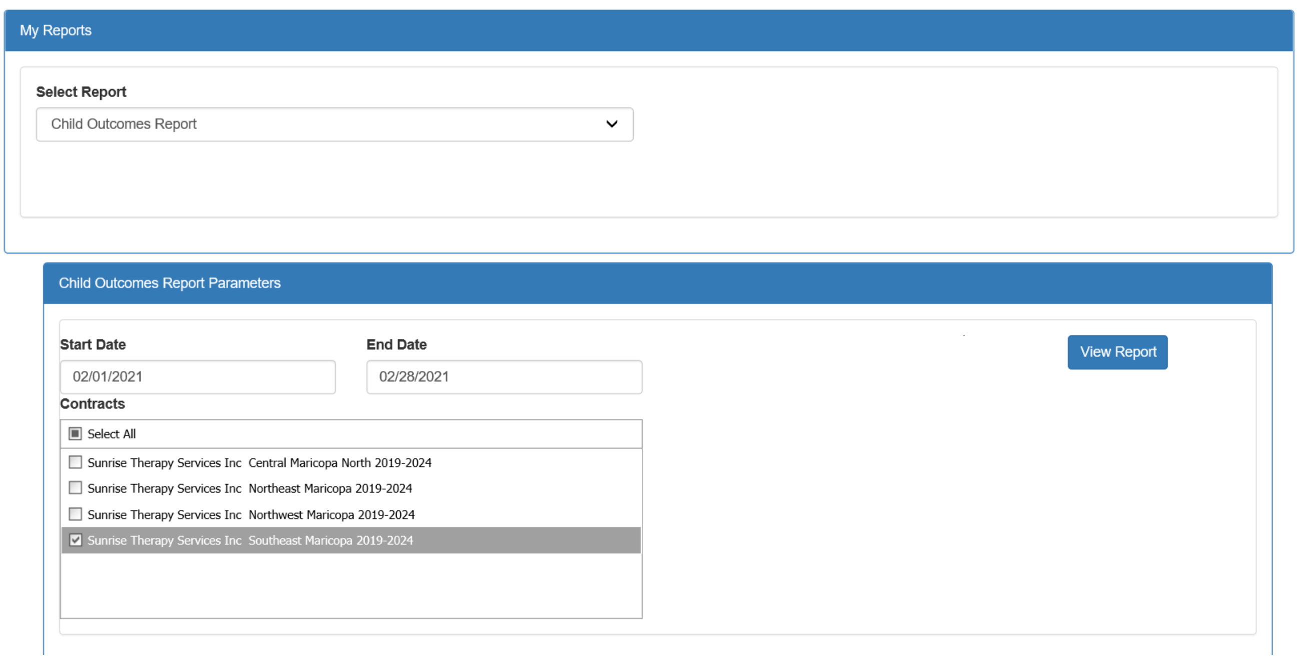
Steps to run Service Delivery Report

1. Click on My Reports from the Home Page.
2. Select Service Delivery Report.
3. Select Service Start Date.

4. Select Service End Date.
5. Select Service Type.
6. Select Contracts.
7. Click on View Report.
8. Click on Open or Save to view or download the report.

5.3 Child Outcomes Report

Child Outcomes Report gives cumulative details about the 3 child indicators, the progress category, and when applicable, the reason the indicators were not completed. Report can be run for any date range (Max of 3yrs).



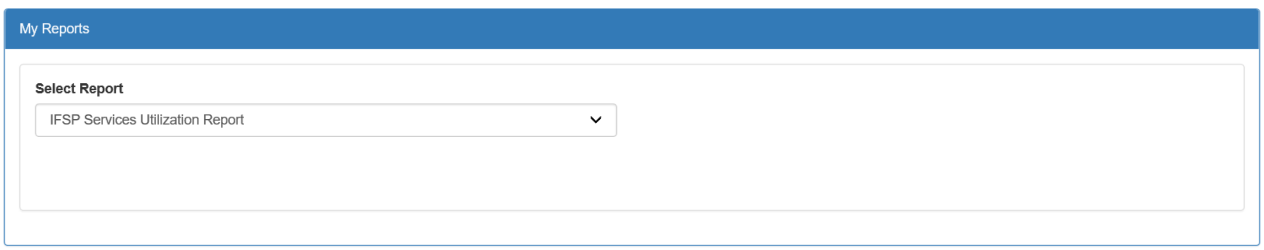
Steps to run Child Outcomes Report

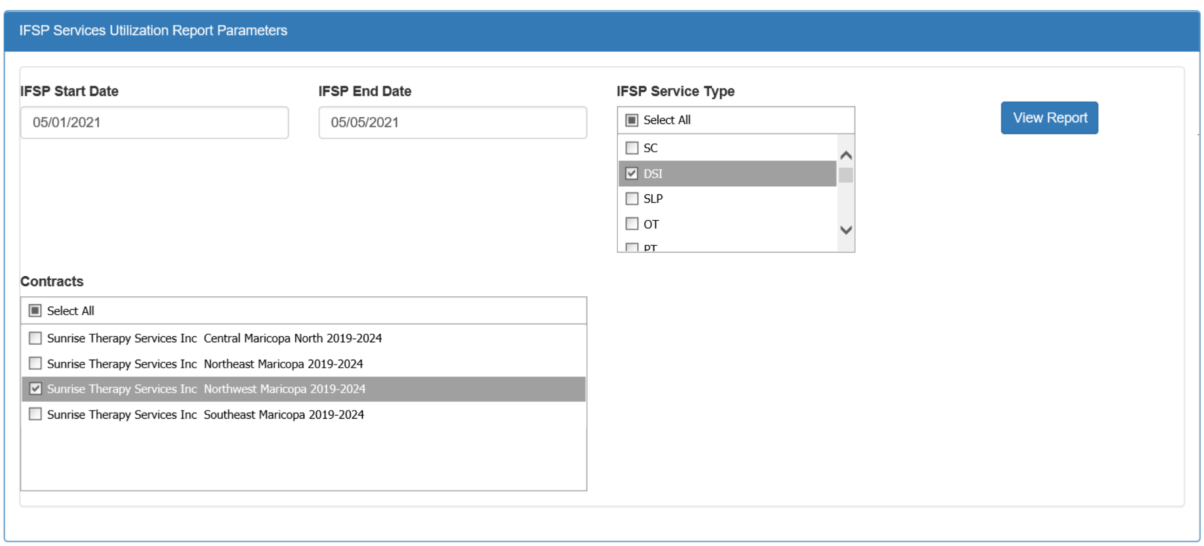
1. Click on My Reports from the Home Page.
2. Select Child Outcomes Report.
3. Select Start Date.
4. Select End Date.

5. Select Contracts.
6. Click on View Report.
7. Click on Open or Save to view or download the report.

5.4 IFSP Services Utilization Report

IFSP Services Utilization report gives cumulative direct service details tied to specific IFSPs including planned start date, actual start date, units delivered, and when applicable, public insurance details. This report can be run for up to a 1-year range.





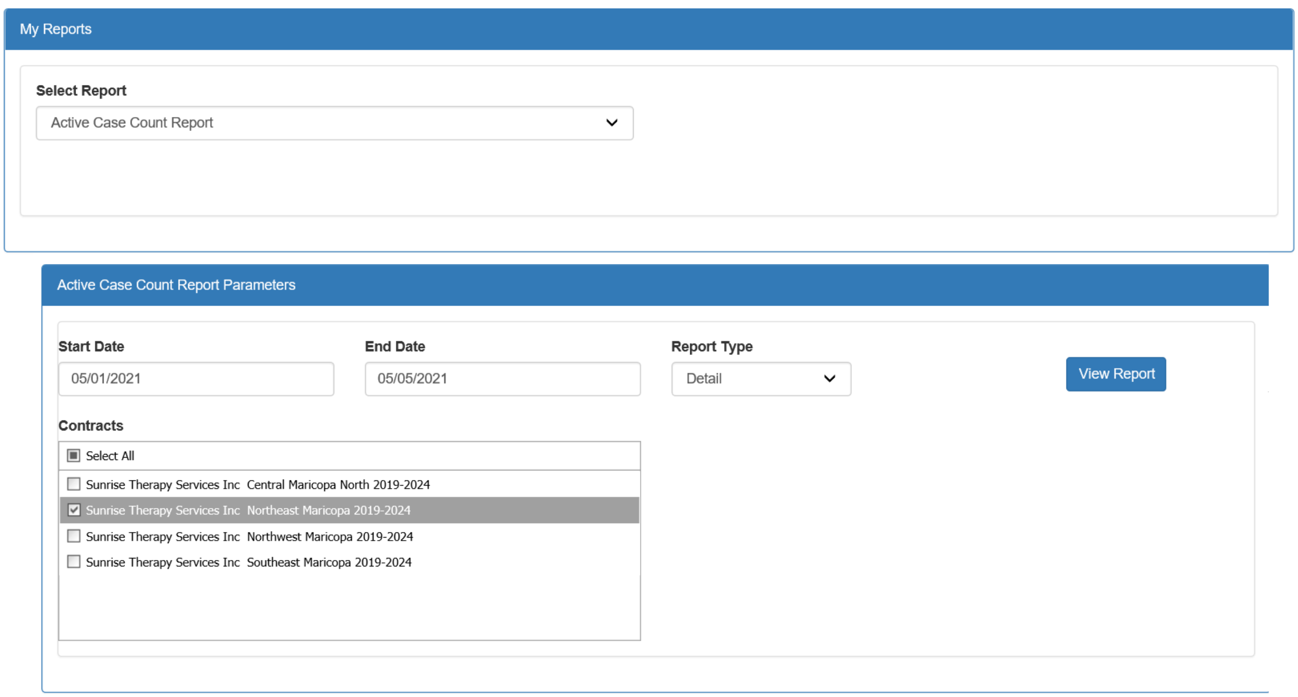
Steps to run IFSP Services Utilization Report

1. Click on My Reports from the Home Page.
2. Select IFSP Services Utilization Report.
3. Select IFSP Start Date.
4. Select IFSP End Date.

5. Select IFSP Service Type.
6. Select Contracts.
7. Click on View Report.
8. Click on Open or Save to view or download the report.

5.5 Active Case Count Report

Active Case Count Report gives single day or cumulative child count and settings by age grouping, race and gender. This report can be run for up to a 1-year range.



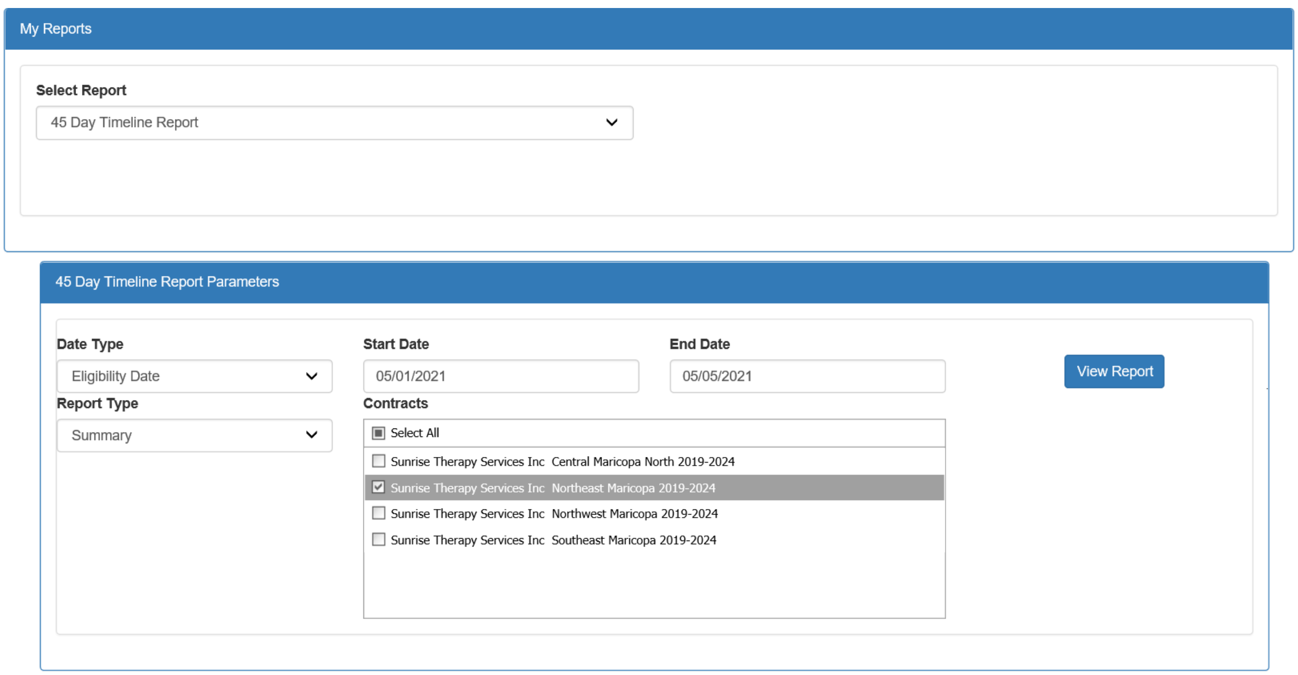
Steps to run Active Case Count Report

1. Click on My Reports from the Home Page.
2. Select Active Case Count Report.
3. Select Start Date.
4. Select End Date.
5. Select Report Type.

6. Select Contracts.
7. Click on View Report.
8. Click on Open or Save to view or download the report.

5.6 45 Day Timeline Report

45 Day Timeline Report (also known as the critical report) gives cumulative details and number of days from referral to eligibility and IFSP, delay reasons, and critical records overdue for the initial planning process. Report can be run for up to a 1-year range.



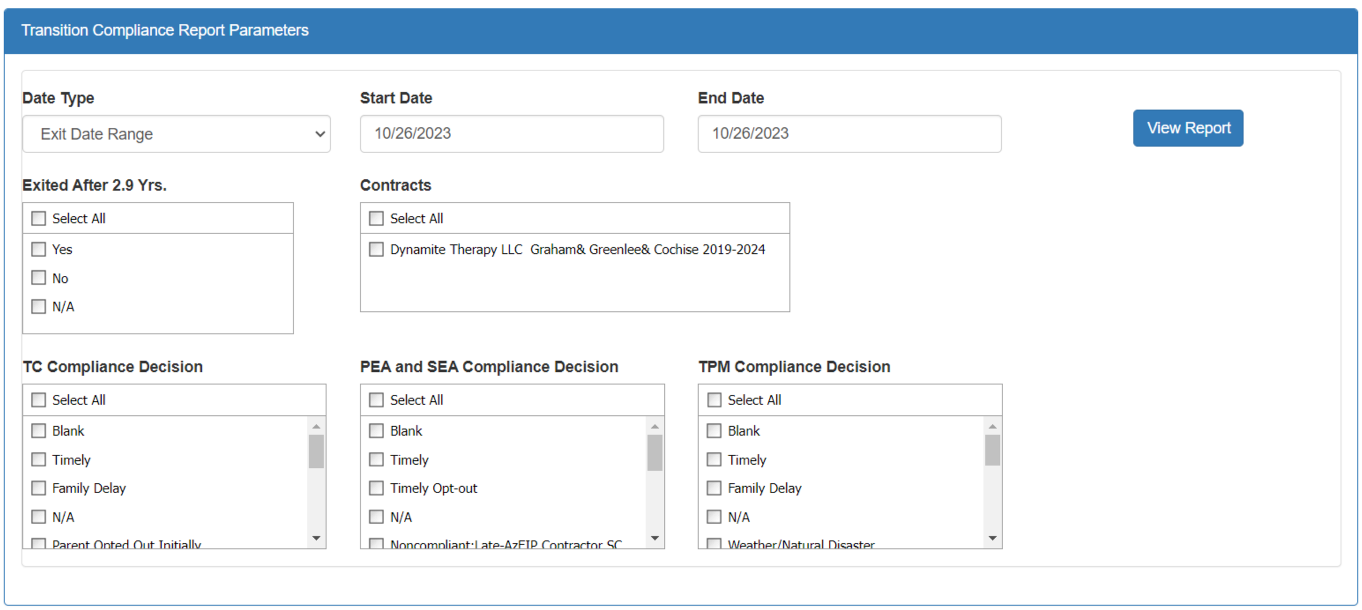
Steps to run 45 Day Timeline Report

1. Click on My Reports from the Home Page.
2. Select 45 Day Timeline Report.
3. Select Date Type.
4. Select Report Type.
5. Select Start Date.

6. Select End Date.
7. Select Contracts.
8. Click on View Report.
9. Click on Open or Save to view or download the report.

5.7 Transition Compliance Report

Transition Compliance Report gives cumulative details compliance decisions made by AzEIP staff after reviewing the transition activities data that the service providing agency entered in I-TEAMS . Report can be run for up to a 1-year range.



Steps to run Transition Compliance Report

1. Click on My Reports from the Home Page.
2. Select Transition Compliance Report.
3. Select Date Type.

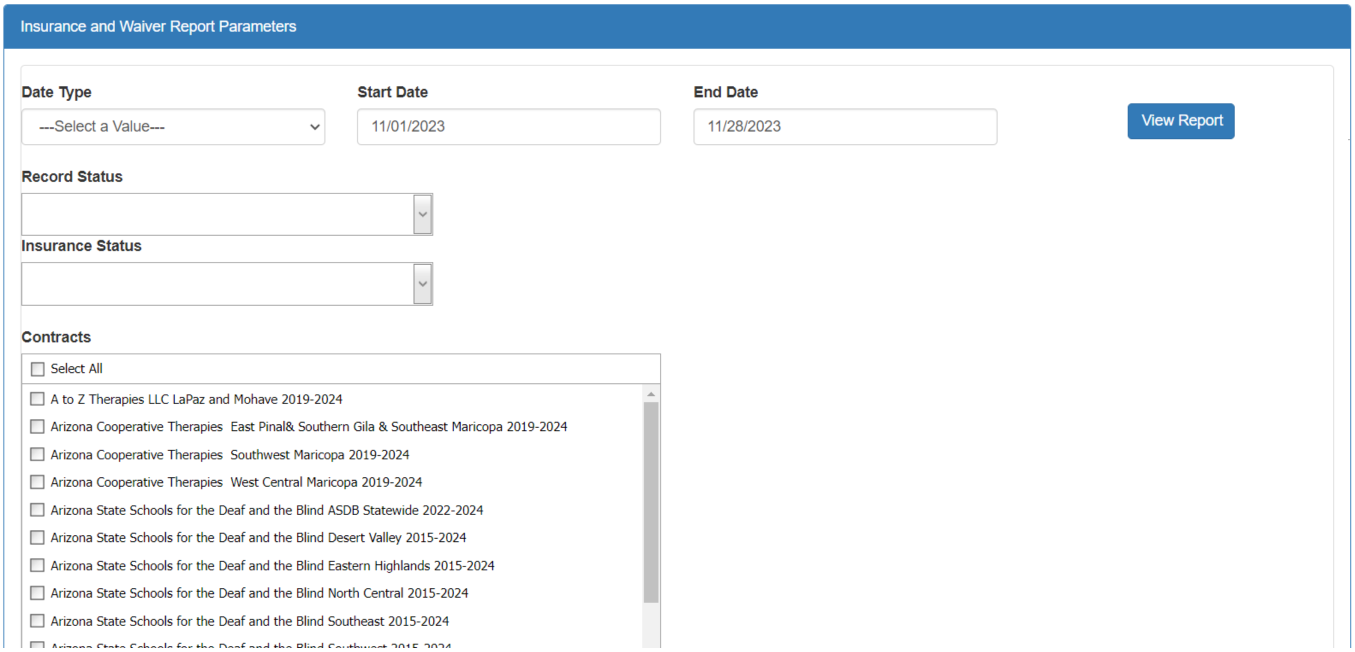
   A. Date Child is 2.3 (recommend for reviewing report for open children for planning meetings and ensuring meetings are scheduled timely)

B. Exit Date Range (recommended for reviewing report for compliance after activities have been entered and child has been exited)

4. Select Start Date.
5. Select End Date.
6. Select Exited After 2.9 yrs.
   A. Yes (child was exited after the age of 2.9 and transition activities were required)
   B. No (child was exited before the age of 2.9 and may not have required transition activities)
   C. N/A (child record is still open and child has not yet turned 3 years old)
7. Select Contracts.
8. Select TC Compliance Decision.
9. Select PEA and SEA Compliance Decision.
10. Select TPM Compliance Decision.
11. Click on View Report.
12. Click on Open or Save to view or download the report.

5.8 Insurance and Waiver Report

Insurance and Waiver report gives details of all Insurances and waivers on child records.



Steps to run Insurance and Waiver Report

1. Click on My Reports from the Home Page.
2. Select Insurance and Waiver Report.
3. Select Date Type.
4. Select Start Date.
5. Select End Date.
6. Select Record Status.
7. Select Insurance Status.
8. Select Contracts.
9. Click on View Report.
10. Click on Open or Save to view or download the report.

CHAPTER 6: CHILD DEMOGRAPHICS

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

6.0 Child Demographics

Child Demographics page saves basic information about the child including Child's Name, DOB, Gender, Ethnicity/Race, Address, Name of Service Coordinator, Parent/Guardian Information, Sibling's details, etc.

6.1 Header of Child Record

Information on header is read-only for all I-TEAMS users. Header will be displayed in all I-TEAMS pages of child record. Header gives basic child information, agency and contract assigned to the record and status of the record.

1. Child's last name and first name.
2. I-TEAMS ID: Primary identification number for AzEIP, is an auto generated unique number assigned to each child record in I-TEAMS to identify a child record.
3. CIF/Assist ID: Secondary identification number is an auto generated unique number assigned to each child record used to connect with DDD data system FOCUS.
4. DOB: Date of Birth of the child.
5. Status: Current Status of child record - Open, Exited, or Pending Transfer.
6. As of: Effective date of the child's current status. If the record is open, as of date is the Referral Date. If record is exited, as of date is the Exit Date.
7. Agency: Name of the agencies (AzEIP, ASDB, DDD) that serve the child. If child is eligible for multiple programs, Primary Agency will be highlighted in yellow.
8. Re-referral: Yes/No will be displayed based on whether the record was Re-referred or not. This does not include situations where a record was re-opened.
9. Contract Region: Name of the program and region that child is associated with. It lists all contract regions if a child is eligible for multiple programs.

10. AzEIP 45th day from Referral Date: Date of the 45th day from the Referral Date will be highlighted in ORANGE if eligibility has not been determined and Initial IFSP has not been created.

6.2 Child Information

Basic information of the child is saved in this section. Any changes on the child's Name, DOB or Gender in Child Demographics page will automatically update the header of the child record as well as the Referral page.

Steps to enter child Information

Note: Each field with an asterisk (*) is required.

1. *Enter Child Name – Child's Last and First names are required fields, but Middle name and Suffix are optional.
2. Enter Child AKA if child has any previous name or nickname.
3. *Enter Date of Birth.
4. *Select Gender.
5. Enter Birth Facility if known. If it is not entered, system will auto populate with value from ADHS if child is reported to be deaf/hard of hearing.
6. Agency is auto populated.
7. *Select School District of Residence. Click on Find School District to lookup school district on AZ Department of Education website.
8. Select Is CPS Involved? User can select Yes when DCS is involved (DCS was known as CPS previously).

   When Yes is selected, enter Start Date and End Date. Start Date and End date will be displayed only when Yes is selected.
9. Click on Save at the bottom of Child Demographics page to save changes successfully.

6.3 Ethnicity/Race

Information about Race, Ethnicity, Language of child etc. is saved in this section.

Steps to enter Ethnicity/Race

Note: Each field with an asterisk (*) is required.

1. *Select Did parent or guardian provide information?
2. *Select Is Child Hispanic or Latino?
3. *Select Race. Single or multiple races can be selected.

   When American Indian or Alaska Native is selected, a list of tribes will be displayed and user can select one or more tribes that apply.
4. Select Language of Home. User must first add an Adult to the child record (parent, guardian, or caregiver) to save Language of Home successfully.
5. Select Interpreter Needed? When Yes is selected, select Language.
6. Select Language of Child (if different)
7. Child Resides With will be auto populated with Adult Type from Adult (parent, guardian, caregiver) section.
8. Click on Save at the bottom of the page to save changes successfully.

6.4 Child Address

Users can enter a child's home address, Phone Number and Email Address in this section. If a child is part of ACP, the user must save the ACP address as the child's address.

Note: If a child is part of ACP, the user must save the ACP address as the adult's address and the child's address. The actual address should not be listed anywhere in I-TEAMS.

Steps to enter Child Address, Phone Number and Email Address

1. Address

   Note: Please enter full and accurate address including Apartment or unit number (when applicable), accurate zip codes and correct spelling of street names.

   When Child address is not saved on the record:

   A. Enter Address, City, Zip, County, Reservation and Address Type.

   B. Click on Add.

   C. Select the correct address from the Address Verification pop-up window.
   D. Click on Save Chosen Address to save the address successfully.

When Child Address is already saved and if user needs to update it:

   A. Click on Edit.
   B. Make necessary changes and then click on Update.
   C. Select the correct address from the Address Verification pop-up window.
   D. Click on Save Chosen Address to save the address successfully.
   E. Click on Delete to remove the address.

2. Phone Number
   A. Enter Phone Number, Extension and Phone Type.
   B. Click on Add to save successfully.
   C. User can click on Edit to update the phone number and click on Delete to remove.
3. Email
   A. Enter Email Address, Email Content and Email Type.
   B. Click on Add to save successfully.
   C. User can click on Edit to update the email and click on Delete to remove.

6.5 Adult (parent, guardian, caregiver)

User can enter information about parent/guardian/caregiver in this section. User can also enter an additional address such as P O Box/Mailing Address if it is different from address saved under Child Address.

Steps to enter Adult information

1. Click on Details/Edit.
2. Select Adult Type. Each child record must have at least one adult associated with it.
3. Enter Name – Last Name, First Name, Middle Name and Suffix of adult.
4. Enter Address.

Note: Please enter a full and accurate address including Apartment or unit number (when applicable), accurate zip codes and correct spelling of street names.

A. Enter Address, City, Zip, County Reservation and Address Type.

B. Click on Add.

C. Select the correct address from the Address Verification pop-up window.

D. Click on Save Chosen Address to save address successfully.

E. User can click on Edit to update the address and click on Delete to remove the address.

Note: If child is part of ACP, user must save ACP address as the adult's address and the child's address. The actual address should not be listed anywhere in the I- TEAMS application.

5. Enter Phone Number:

   A. Enter Phone Number, Extension and Phone Type.

   B. Click on Add to save successfully.

   C. User can click on Edit to update the phone number and click on Delete to remove the number.

6. Enter Email Address:

   A. Enter Email Address, Email Content and Email Type.

   B. Click on Add to save successfully.

   C. User can click on Edit to update the email and click on Delete to remove it.

7. When Use Child Address is selected Child Resides will be set as YES and child's address will be displayed. Child resides will be set as NO with adult's address when Use Child Address is NOT selected.

8. When Use Parent1 Address is selected Child Resides will be set as NO and displayed with adult's address.

9. Select Do Not Contact if parent is not to be contacted. This option will be available only if Parent1 or Parent2 is selected as Adult Type. When Do Not Contact option is selected, header of child record will be displayed with yellow highlighted message – "Do Not Contact: Name of the parent.

10. Select Is Educational Parent if the adult has the legal right to make early intervention decisions for the child and family. Each child must have an "Educational Parent" identified in I- TEAMS who has the legal right to make education decisions on behalf

of the child.

11. Select Is Responsible Party to identify the responsible party for financial matters. Each child must have a Responsible Party for financial matters identified in I-TEAMS.
12. Click on Close Details to save Adult information successfully.
13. If an ACP address is saved as Adult address, Is ACP will be marked as YES automatically, otherwise Is ACP will be marked as NO.

6.6 Siblings

Information about child's sibling under three currently or previously served by AzEIP, DDD, or ASDB can be entered in Siblings section.

Steps to add sibling

1. Click on Add Sibling.
2. Enter Last Name, First Name, Middle Name and DOB.
3. Select Agency that applies to sibling. User can select multiple agencies if applicable.
4. Click on Add New to save siblings details successfully.
5. User can click on Edit to make changes or click on Remove to remove sibling details.
6. This section should also be used to document children other than siblings being served in the same home as the child, (e.g., foster children).

6.7 Additional Data

Additional Data section provides links to other pages of child's record at the bottom of the page for easy access.

1. Referral.
2. Insurance Consent.
3. Insurance/TPL Waiver.
4. Assign/Change Team Members.
5. Screening.
6. Eligibility.

7. IFSP Information.
8. Child Indicator Summary Form.
9. Service Delivery.
10. Transfer Child.
11. Transition Child.
12. Exit Child Record.
13. Compliance Decisions.

6.8 Comments

The user can enter comments, notes, or any additional information related to the child in this section. Comments section is located at the very bottom of the Child Demographics page. The most recent comments are saved at the bottom of the section.

Steps to enter comments

1. Enter the information.
2. Click on Save Comment.
3. Name of the person who entered the comment and the date it was entered will be displayed along with the comment.

CHAPTER 7: ASSIGN/CHANGE TEAM MEMBERS

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

7.0 Assign/Change Team Members

Assign/Change Team Members page allows user to save information about Agency, Contract Provider Name and assigned Team Members for each child record.

Agency

	Agency	Contract Provider Name	Is Primary	Assignment Start Date	Assignment End Date
Edit	AzEIP	RISE Early Intervention Services Central Maricopa North 2019-2024		08/23/2023	
Edit	AzEIP	Sunrise Therapy Services Inc Northwest Maricopa 2019-2024		08/17/2023	08/23/2023
Add	----------	----------		__/__/____	__/__/____

Assign / Change Team Members

	Discipline Type	Provider Name	Team Lead	Assignment Start Date	Assignment End Date
Edit	Service Coordinator	Alanna Carranza [Central Maricopa North 2019-2024]		08/23/2023	
Add	----------	----------		__/__/____	__/__/____

Team Members History Grid

Discipline	Provider Name	Team Lead	Start Date	End Date
Service Coordinator	Meredith Lawrence [Sunrise Northwest Maricopa 2019-2024]	No	8/17/2023	8/23/2023
Developmental Special Instruction	Samantha Blanchard [Sunrise Northwest Maricopa 2019-2024]	No	8/17/2023	8/23/2023
Speech-Language Pathologist	Stephanie Jacob [Sunrise Northwest Maricopa 2019-2024]	No	8/17/2023	8/23/2023
Occupational Therapist	Jennifer McCann [Sunrise Northwest Maricopa 2019-2024]	No	8/17/2023	8/23/2023
Physical Therapist	Priyanka Villanassery [Sunrise Northwest Maricopa 2019-2024]	No	8/17/2023	8/23/2023

7.1 Agency

Agency section displays both active and historic details about a child's Agency, Contract Provider name and duration each agency and contract have been assigned to the child.

1. AzEIP Agency will be automatically assigned to every child record as Primary Agency when a new referral is created. When child becomes eligible for other agencies (DDD, ASDB) user can assign appropriate agencies to the record. A child record can be assigned to multiple agencies depending on child's eligibility but only one Primary Agency.

A. User should add DDD as an Agency when the Eligibility page has DDD Eligibility Decision as Yes.

B. User should add ASDB as an Agency when the Eligibility page has ASDB Eligibility Decision as Yes.

C. Based on Agency selected and region of child's address, Contract Provider Name can be selected using a drop-down list. Every child record in I-TEAMS must be assigned to an AzEIP agency and contract.

2. AzEIP will be set as Is Primary by default when new referral is created. When multiple agencies are assigned to a child record appropriate agency must be selected as Primary per table below.

Eligibility	Is Primary
AzEIP	AzEIP
AzEIP, DDD	DDD
AzEIP, ASDB	ASDB
AzEIP, ASDB, DDD	DDD

3. Assignment Start Date for AzEIP contract will be automatically set as Referral Date when a new referral is created. User must enter Assignment Start Date for DDD and ASDB eligible child records.

A. For DDD eligible children, Assignment Start Date should be entered as DDD Eligibility Date when child becomes DDD eligible.

B. For ASDB eligible children, Assignment Start Date should be entered as Vision/Hearing Eligibility Date.

4. Assignment End Date for AzEIP will be automatically saved to a child record by I-TEAMS when child record is transferred from one region to another. When a record is exited/closed, Assignment End Date will automatically be saved as Exit Date for all active agencies.

A. Assignment End Date for DDD must be entered after record is transferred from one region to another when child's new address is in new DDD District or when child is no longer DDD eligible. Add new DDD District with Assignment Start Date if child's new address is in new DDD District and child is still DDD eligible.

B. Assignment End Date for ASDB must be entered after record is transferred from one region to another when child's new address is in new ASDB Region or when child is no longer ASDB eligible. Add new ASDB Region with

Assignment Start Date if child's new address is in new ASDB Region and child is still ASDB eligible.

7.2 Assign/Change Team Members

User can add/change a team member including Team Lead in child record. Service Coordinator will already be assigned when SC is assigned from Child Demographics page. Team members must be assigned to a child record to have access to the record.

1. Only one active Discipline Type can be assigned to each child record. ASDB discipline will be available on the list only if associated agency is assigned to the record.
2. Provider Name will be displayed based on assigned contract region of the child record as well as the Discipline Type selected. Only providers who have been added as Employees for that contract region, assigned user roles, and have completed their professional provider profile will be displayed on the drop-down list for the region.
3. User can assign a team member as Team Lead. Each eligible child with an IFSP must have a Team Lead identified. Each child can have only one active Team Lead.
4. Assignment Start Date must be entered for all team members and is a required field.
5. Assignment End Date can be entered to end date active team member and assign new team member.

7.3 Team Members History Grid

All assigned team members of previous/inactive contracts will be displayed in the history grid.

Steps to assign DDD as Primary and assign DDD Service Coordinator

1. Verify that Eligibility page shows DDD Eligibility Decision as Yes.

   Note: Please contact I-TEAMS Help Desk when DDD eligibility information is missing or incorrect on the Eligibility page.
2. Click on Assign/Change Team Member page from Additional Data section at bottom of the child record.
3. Click on Edit of AzEIP agency.
4. Uncheck Is Primary to unmark AzEIP as primary agency of the record.

5. Click on Update to save changes successfully.
6. Assign DDD under Agency section.
    A. Select DDD from Agency drop-down list.
    B. Select DDD Contract from Contract Provider Name drop-down list.
    C. Check Is Primary to mark DDD as Primary Agency.
    D. Enter Assignment Start Date as DDD Eligibility Date.
    E. Click on Add to save successfully.
7. End date AzEIP Service Coordinator under Assign/Change Team Members section.
    A. Click on Edit of AzEIP Service Coordinator.
    B. Enter Assignment End Date.
    C. Click on Update.
8. Assign DDD Service Coordinator under Assign/Change Team Members section.
    A. Select Service Coordinator from Discipline Type drop-down list. AzEIP Service Coordinator must be end dated first to assign DDD Service Coordinator.
    B. Select Provider Name from drop-down list.
    C. Click on Add to save successfully.

Steps to assign ASDB Agency and ASDB Provider

1. Verify that Eligibility page shows ASDB Eligibility Decision as Yes. If not, please contact a Supervisor, ASDB, or the I-TEAMS Help Desk to enter ASDB eligibility details to child record.

Note: Central Referral Staff can now assign ASDB at time of referral prior to AzEIP or ASDB eligibility being entered

2. Click on Assign/Change Team Member page from Additional Data section at bottom of the child record.
3. If, based on table above, ASDB will be assigned as Primary:
    A. Click on Edit of AzEIP Agency.
    B. Uncheck Is Primary to unmark AzEIP as primary agency of the record.
    C. Click on Update to save changes successfully.

   D. Select ASDB from Agency drop-down list.
   E. Select ASDB contract from Contract Provider Name drop-down list.
   F. Check Is Primary to mark ASDB as Primary Agency.
   G. Enter Assignment Start Date as Vision/Hearing Eligibility Date from Eligibility page.
   H. Click on Add to save successfully.

4. If ASDB will not be assigned as Primary:
   A. Select ASDB from Agency drop-down list.
   B. Select ASDB Contract from Contract Provider Name drop-down list.
   C. Enter Assignment Start Date as Vision/Hearing Eligibility Date from Eligibility page.
   D. Click on Add to save successfully.
5. Assign ASDB provider under Assign/Change Team Members section.
   A. Select ASDB Discipline Type from drop-down list.
   B. Select Provider Name from drop-down list.
   C. Click on Add to save successfully.
6. Click on Add to save successfully.

Steps to change Team Lead to non-Team Lead

1. Save Assignment End Date on the current Team Lead.
   A. Click on Edit.
   B. Enter Assignment End Date.
   C. Click on Update to save successfully.
2. Add the former Team Lead back in as a regular (non-TL) provider.
   A. Select Provider Discipline Type from drop down list.
   B. Select Provider Name from drop down list.
   C. Enter Assignment Start Date.
   D. Click on Add to save successfully.

Steps to change non-Team Lead to Team Lead

1. Save Assignment End date on team member who will be the new Team Lead.
    A. Click on Edit.
    B. Enter Assignment End Date.
    C. Click on Update to save successfully.
2. Add the new Team Lead.
    A. Select Provider Discipline Type from drop down list.
    B. Select Provider Name from drop down list.
    C. Check Team Lead to mark provider as Team Lead.
    D. Enter Assignment Start Date.
    E. Click on Add to save successfully.

CHAPTER 8: SCREENING

REVISION DATE: December 2023

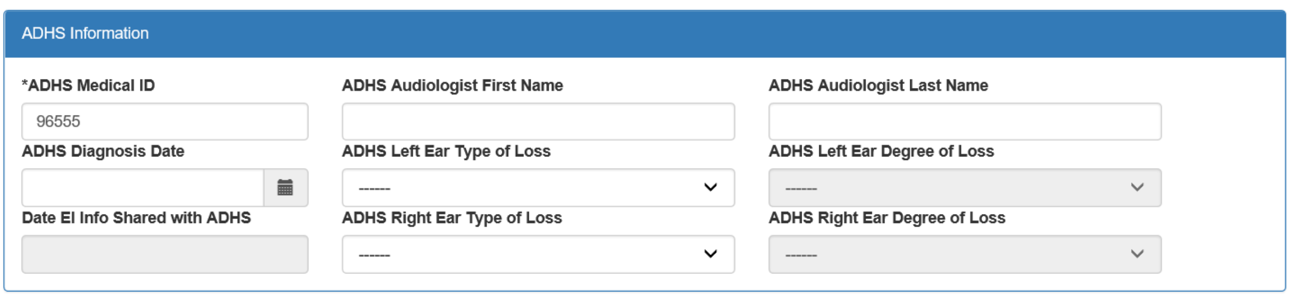
EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

8.0 Screening

Screening page is a read only page and displays information from ADHS about the Audiologist and Diagnosis details. Information is auto populated from ADHS system and can be manually updated by designated AzEIP Staff.

8.1 ADHS Information



Below are the details displayed in Screening page:

1. ADHS Medical ID
2. ADHS Audiologist First Name
3. ADHS Audiologist Last Name
4. ADHS Diagnosis Date
5. ADHS Left Ear Type of Loss
6. ADHS Left Ear Degree of Loss
7. Date EI Info Shared with ADHS
8. ADHS Right Ear Type of Loss
9. ADHS Right Ear Degree of Loss

ADHS Audiologist is the audiologist that reported the child's hearing status to ADHS and ADHS Diagnosis Date is the date reported to ADHS confirming the child's hearing status.

CHAPTER 9: INSURANCE CONSENT

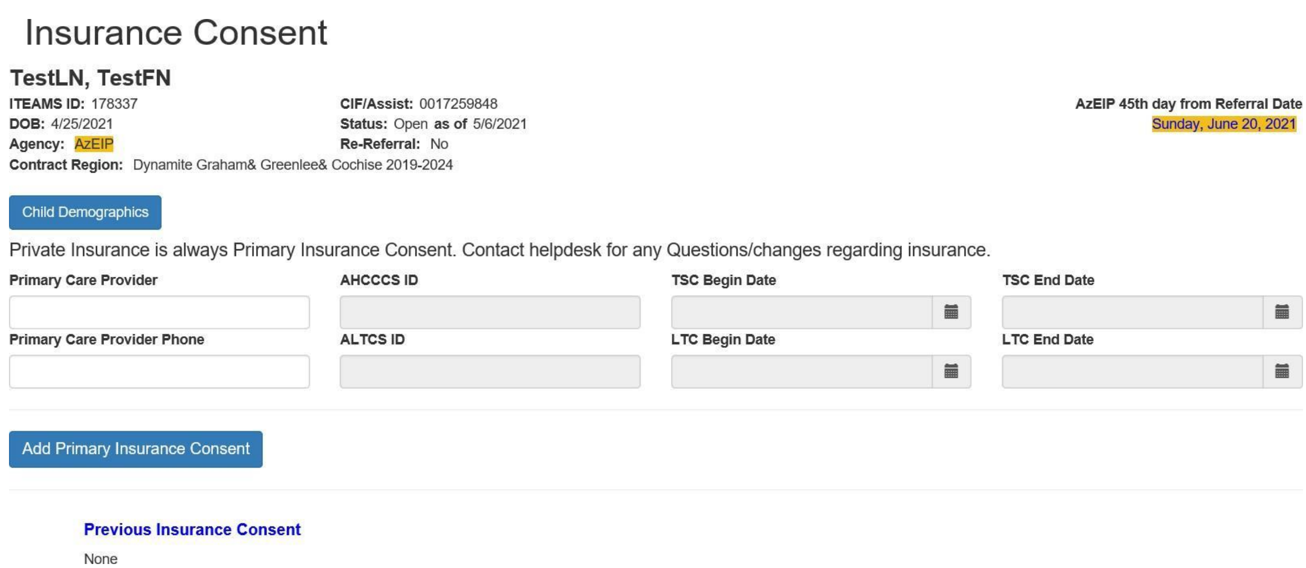
REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

9.0 Insurance Consent

Insurance Consent page allows user to save Primary Care Provider information and Insurance details to the child record and view active and previous insurances.



Steps to enter Primary Care Provider details

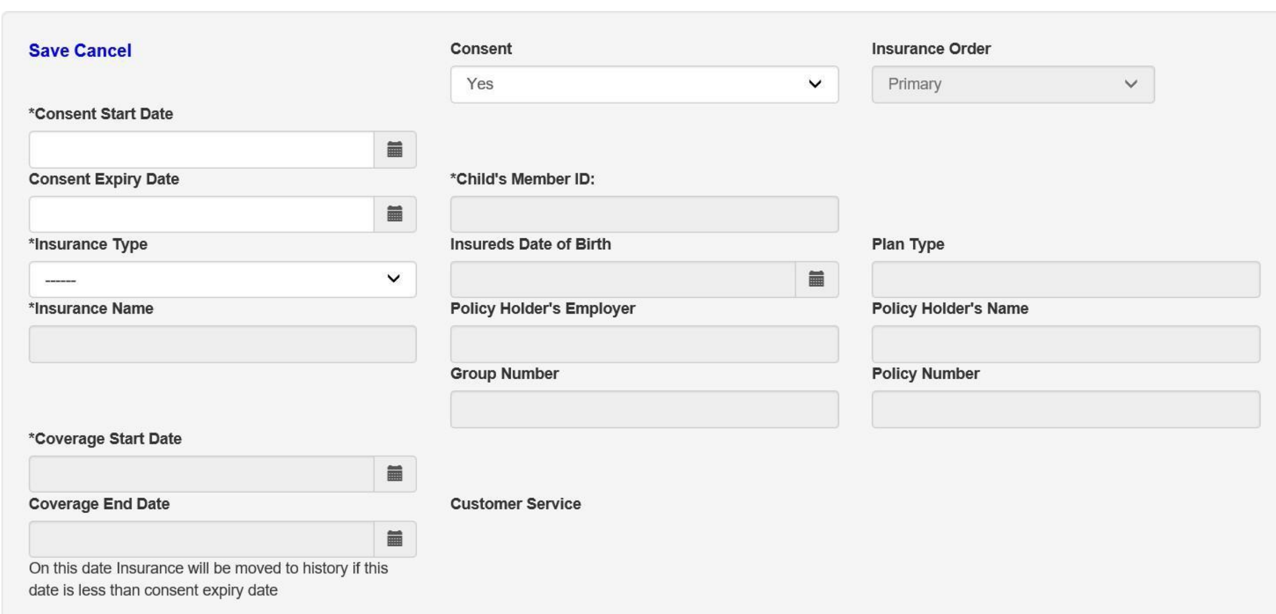
1. Click on the Insurance Consent link from the Additional Data section at the bottom of the child record.
2. Enter Primary Care Provider.
3. Enter Primary Care Provider Phone.
4. Click on Save Primary Care.

User can see child’s AHCCCS and ALTCS eligibility dates which are pushed from FOCUS only when child is DDD eligible. They are read-only values for all I-TEAMS users. If this information does not auto-populate, check that the child's first name, last name, date of birth, and gender match between AHCCCS and I-TEAMS. I-TEAMS may be updated as necessary. A match may take up to a month from the change to push information back to I-TEAMS.

1. AHCCCS ID.
    A. TSC Begin Date.
    B. TSC End Date.
2. ALTCS ID.
    A. LTC Begin Date.
    B. LTC End Date.

9.1 Active Insurance(s)

This section allows users to enter Insurance details to the child record and displays all active insurances. Users can enter up to three active insurances to a record. Each insurance is associated with a unique Insurance ID. Users must enter new Primary or Secondary Insurance if the child's insurance coverage changes.



Steps to enter Primary Insurance when no active insurance is listed

Note: Each field with an asterisk (*) is required.

1. Click on Insurance Consent link from Additional Data section at bottom of the child record.
2. Click on Add Primary Insurance Consent.
3. *Select Consent.
    A. *User must select Consent No Reason if Consent is selected as No. This field will be displayed only when Consent is No.
    B. *User must enter No Reason Other if Consent No Reason is selected as Other. This field will be displayed only when Consent No Reason is Other.
4. *Enter Consent Start Date.
5. Enter Consent Expiry date.
6. *User must select Insurance Type when Consent is Yes/Yes-HSA/Yes-HRA.

    Note: When Insurance Type is selected, page will be refreshed to display only fields required for the selected Insurance Type.
7. *Enter Insurance Name. When user types first few letters of Insurance Name, list of available insurances will be displayed according to Insurance Type selected and user can click on correct Insurance Name.
8. *User must enter Child's Member ID when Insurance Type is Private.
9. *User must enter Child's AHCCCS ID when Insurance Type is Public. AHCCCS ID should always start with capital letter A followed by 8 digits. Child's AHCCCS ID field will be displayed only when Insurance Type is Public.
10. *Enter Insureds Date of Birth when Insurance Type is Private or Military-Tricare. Insureds Date of Birth will be auto populated when Insurance Type is Public.
11. Enter Plan Type.
12. Enter Policy Holder's Employer.
13. Enter Policy Holder’s Name when Insurance Type is Private or Military-Tricare. Policy Holder’s Name will be auto populated when Insurance Type is Public.
14. *User must enter Group Number when Insurance Type is Private.
15. Enter Policy Number.

16. *Enter Coverage Start Date.
17. Enter Coverage End Date if known. Active Insurance will be automatically moved to Previous Insurance Consent section on Coverage End Date.
18. Click on Save to save Insurance details successfully.
19. Click on Yes if all information entered is accurate and ready to save. Click on No to review.
20. The following fields will be auto populated once Insurance has been saved:
    A. Insurance ID is a unique number associated with each insurance entry to I-TEAMS. This ID can be used to enter Waivers associated to an insurance.
    B. Insurance Customer Service and Claims Address.
    C. If Consent Expiry Date is not entered before saving Primary Insurance, I-TEAMS will auto populate a date 365 days from Consent Start Date. Active Insurance will be automatically moved to Previous Insurance Consent section on Consent Expiry Date.

Steps to enter Secondary Insurance

Note: Each field with an asterisk (*) is required.

1. Click on Insurance Consent link from Additional Data section at bottom of the child record.
2. Click on Add Secondary Insurance Consent.
3. Please refer to Steps to enter Primary Insurance when no active insurance is listed (steps 3-19).

Steps to enter new Primary or Secondary Insurance when active insurance is listed

Note: Each field with an asterisk (*) is required.

1. Click on Insurance Consent link from Additional Data section at bottom of the child record.
2. Click on Edit on active insurance consent.

   Note: If user clicks on Add Primary Insurance or Add Secondary Insurance, user will get a message to enter consent expiry date to active insurance.
3. Enter Consent Expiry Date to date before the new Consent Start Date. If both Primary

and Secondary Insurances are to be updated, then user must change Consent Expiry Date of each insurance separately.

4. Click on Update. Insurance will be moved to Previous Insurance Consent section.
5. Click on Add Primary Insurance Consent to enter primary insurance OR click on Add Secondary Insurance Consent to enter secondary insurance.
6. Please refer to Steps to enter Primary Insurance when no active insurance is listed (steps 3-19).

Steps to enter Primary Insurance when child already has one public insurance listed

1. Click on Edit on active insurance consent.
2. Change Insurance Order from Primary to Secondary.
3. Click on Update to save changes successfully.
4. Click on Add Primary Insurance Consent.
5. Please refer to Steps to enter Primary Insurance when no active insurance is listed (steps 3-19).

Steps to enter Tertiary (third) Insurance when child already has two insurances listed

Below is the order of Primary, Secondary and Tertiary insurances.

Primary	Primary (Secondary)	Secondary (Tertiary)
Private	HSA	Public
Private	HRA	Public
Private	Private	Public
Private	Military	Public
Private	Public	Public

1. Click on Insurance Consent link from Additional Data section at bottom of the child record.
2. Click on Edit of Secondary Insurance.
3. Change Insurance Order to Primary.
4. Click on Update.

5. Click on Add Secondary Insurance Consent.
6. Please refer to Steps to enter Primary Insurance when no active insurance is listed (steps 3-19) to enter the third insurance details.
7. Go to Child Demographics page.
8. Save a comment in Comments section to specify which insurance is Primary, Secondary and Tertiary.

9.2 Previous Insurance Consent

This section displays history of previous insurance consents. User cannot make any changes to previous insurances. Reach out to AzEIP Help Desk for assistance in updating historical insurances.

CHAPTER 10: INSURANCE/TPL WAIVER

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

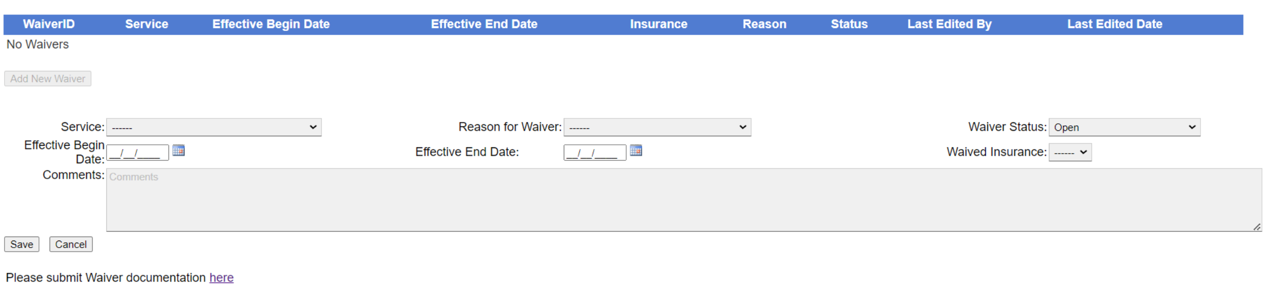
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

10.0 Insurance/TPL Waiver

Insurance/TPL Waiver page displays both active and historical waivers. This page also allows users to create new waivers for OT, PT, or SLP services for a specified date range. Each waiver is applicable only for one service and Insurance. Users should create new waiver for different services and different insurances.

Waivers will be automatically ended:

1. When a child record is transferred from one contract to another. I-TEAMS will automatically save Effective End Date on all active waivers with Effective Date of Transfer.
2. On respective Insurance Consent Expiry Date or Coverage End Date.
3. When a child is exited.



Steps to Add and Edit Waiver

Note: Each field with an asterisk (*) is required.

1. Click on Insurance/TPL Waiver link from Additional Data section at bottom of the child record.
2. *Click on Add New Waiver.

3. Select Service.
4. Select Reason for Waiver. Contact I-TEAMS Help Desk to enter other reasons or if the reason is not in the list.
5. Waiver Status will be auto populated as Open.
6. Enter Effective Begin Date.
7. Enter Effective End Date. If Effective Date entered is a date before today's date, Waiver will be considered as historical and cannot be edited.
8. Select Waived Insurance. I-TEAMS will display both Active and Previous insurances saved in child record between Effective Begin Date and Effective End Date.
9. Enter Comments for additional information about the waiver.
10. Click on Save to save waiver successfully.
11. Click on Edit to make changes to active Waiver.
12. Make necessary changes and then click on Save.

10.1 Waiver Documentation submission

This feature allows users to submit Waiver documents through I-TEAMS.

Steps to submit Waiver documentation

Note: Each field with an asterisk (*) is required.

1. Click on **here** from Insurance / TPL Waiver page.
2. *Enter Email.
3. *Enter Program Name.
4. *Enter Region.
5. *Enter I-TEAMS ID.
6. *Enter Waiver ID.
7. Click on Next.
8. Click on Add file to upload the EOB, if applicable.
9. Click on Add file to upload the AHCCCS Denial, if applicable.
10. Click on Next.

11. Click on Add file to upload any other documents.
12. Enter any additional Information.
13. Click on Submit.

CHAPTER 11: ELIGIBILITY

REVISION DATE: December 2023

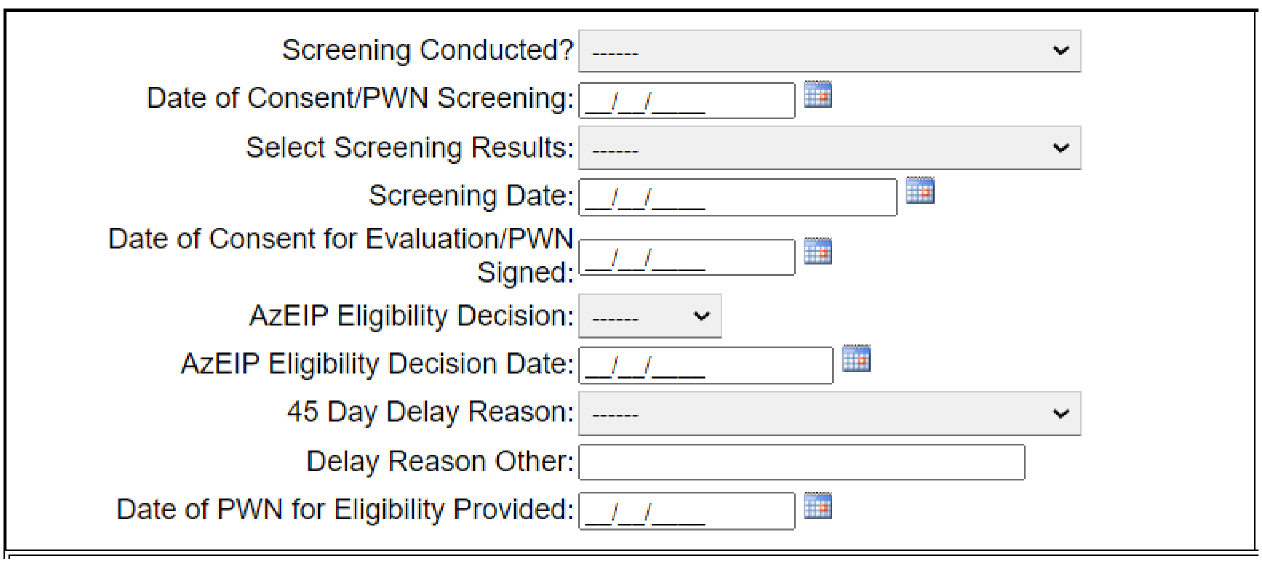
EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

11.0 Eligibility

Eligibility page allows user to save details of the AzEIP eligibility determination process including Screening, Evaluation, Prior Written Notice, AZEIP Eligibility Decision, Re-determination of Eligibility, etc. Eligibility page also displays DDD eligibility and ASDB eligibility information.

11.1 AzEIP Eligibility


Screening Conducted? ------
Date of Consent/PWN Screening: __/__/____
Select Screening Results: ------
Screening Date: __/__/____
Date of Consent for Evaluation/PWN Signed: __/__/____
AzEIP Eligibility Decision: ------
AzEIP Eligibility Decision Date: __/__/____
45 Day Delay Reason: ------
Delay Reason Other:
Date of PWN for Eligibility Provided: __/__/____

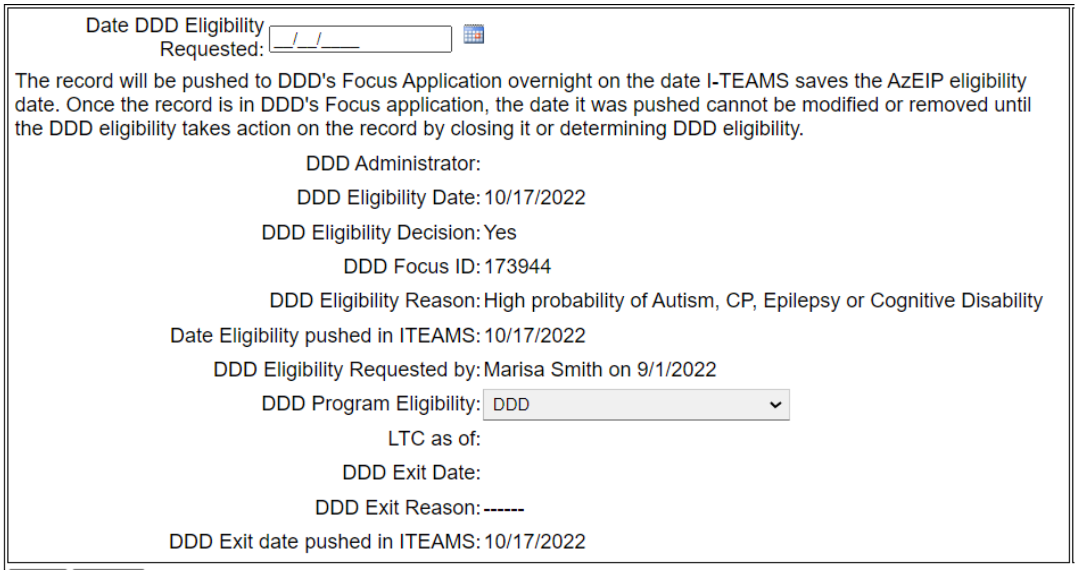
Steps to enter AzEIP eligibility information

Note: Each field with an asterisk (*) is required.

1. Click on Eligibility link from Additional Data section at bottom of the child record.
2. Select answer to Screening Conducted? User will see additional or fewer fields based on the value selected.

3. Enter Date of Consent/PWN Screening. This field will be available only if Screening Conducted is selected as Yes.
4. *User must Select Screening Results if Screening Conducted is selected as Yes.
5. *User must enter Screening Date if Screening Conducted is selected as Yes.
6. Enter Date of Consent for Evaluation/PWN Signed if applicable.
7. Select AzEIP Eligibility Decision. When Yes is selected, page will refresh and user will see more fields in eligibility page. Additionally, DDD and ASDB Eligibility sections will be displayed.
8. *User must enter AzEIP Eligibility Decision Date.
9. User must enter 45 Day Delay Reason when AzEIP Eligibility Decision Date is more than 45 days from Referral Date.
10. User must enter Delay Reason Other when Other is selected as 45 Day Delay Reason.
11. Enter Date of PWN for Eligibility Provided.
12. *User must Select Established Condition or Developmental Delay when AzEIP Eligibility Decision is Yes.
    A. When Established Condition is selected, Eligibility Decision Based on will be automatically selected as Records. Also, user must select one or more values for Select All Established Conditions that Apply.
    B. When Developmental Delay is selected, user must select Eligibility Decision Based On from drop-down list. Also, user must select one or more values for Select All Developmental Delays that Apply: (50% Developmental Delay or 2 Standard Deviations).
13. Click on Save to save eligibility details successfully.

11.2 DDD Eligibility



Date DDD Eligibility Requested:	__/__/____

The record will be pushed to DDD's Focus Application overnight on the date I-TEAMS saves the AzEIP eligibility date. Once the record is in DDD's Focus application, the date it was pushed cannot be modified or removed until the DDD eligibility takes action on the record by closing it or determining DDD eligibility.

DDD Administrator:	
DDD Eligibility Date:	10/17/2022
DDD Eligibility Decision:	Yes
DDD Focus ID:	173944
DDD Eligibility Reason:	High probability of Autism, CP, Epilepsy or Cognitive Disability
Date Eligibility pushed in ITEAMS:	10/17/2022
DDD Eligibility Requested by:	Marisa Smith on 9/1/2022
DDD Program Eligibility:	DDD
LTC as of:	
DDD Exit Date:	
DDD Exit Reason:	------
DDD Exit date pushed in ITEAMS:	10/17/2022

Child must be AzEIP eligible and Insurance Consent page must include Family consent (Yes, Yes-HSA, Yes-HRA, No Insurance, No-HSA in order to request for DDD Eligibility. When AzEIP Eligibility Decision is saved as Yes, user will see DDD Eligibility section in the bottom of Eligibility page. Date DDD Eligibility Requested will be auto populated with the date when AzEIP eligibility is entered in I-TEAMS except for the records with Family Consent as No for insurance or No-HRA. If Family Consent changes from No, user must enter a date in Date DDD Eligibility Requested and click on Save to successfully request for DDD eligibility.

Below is a list of mandatory fields to successfully save Date DDD Eligibility Requested:

1. Child Demographics page:
    A. Child Name Last.
    B. Child Name First.
    C. Date of Birth.
    D. Gender.
    E. Child Address.
    F. Home phone number under Child Address. (Phone type must be Home)
    G. School District of Residence.

H. Race/Ethnicity.

I. Language of Home.

J. Responsible Party should be Yes.

K. Responsible Party First Name.

L. Responsible Party Last Name.

M. Responsible Party Address.

N. Child/Responsible Party Phone.

2. Referral page:

A. Referral Reason Type.

B. Referral Date.

C. Referrer First Name.

D. Referrer Last Name.

E. Referrer Phone.

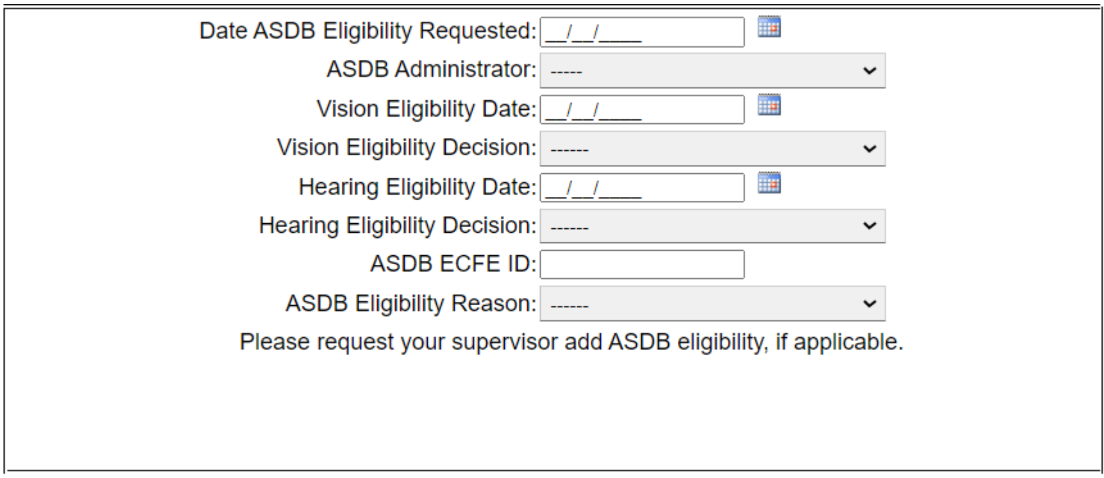
F. Referrer Address.

Authorized DDD personnel determine DDD eligibility and enter DDD eligibility details in FOCUS. An electronic automated process (AKA “push pull” process between I-TEAMS and FOCUS) pushes DDD Eligibility information to I-TEAMS from FOCUS at midnight each night. DDD Eligibility details are read-only for all I-TEAMS users.

Steps to request for Re-determination of DDD Eligibility

1. Check DDD Eligibility Decision on Eligibility page.
2. If DDD Eligibility Decision is No, enter Date DDD Eligibility Requested.
3. Click on Save.

11.3 ASDB Eligibility


Date ASDB Eligibility Requested: __/__/____
ASDB Administrator: -----
Vision Eligibility Date: __/__/____
Vision Eligibility Decision: ------
Hearing Eligibility Date: __/__/____
Hearing Eligibility Decision: ------
ASDB ECFE ID:
ASDB Eligibility Reason: ------
Please request your supervisor add ASDB eligibility, if applicable.

If child becomes ASDB eligible, ASDB eligibility details must be entered first in order to assign child record to ASDB agency. ASDB, DDD Supervisor, and Contract Admin users will be able to enter ASDB eligibility to child records.

Steps to enter ASDB eligibility

1. Enter Date ASDB Eligibility Requested.
2. Select ASDB Administrator.
3. Enter Vision Eligibility Date.
4. Select Vision Eligibility Decision.
5. Enter Hearing Eligibility Date.
6. Select Hearing Eligibility Decision.
7. Enter ASDB ECFE ID
8. Select ASDB Eligibility Reason.

11.4 AzEIP Eligibility Redetermination

Steps to enter AzEIP eligibility redetermination information

1. Click on Eligibility link from Additional Data section at bottom of the child record.

If AzEIP Eligibility Redetermination Decision is Yes, keep the original AzEIP Eligibility Date, and:

2. *User must Select Established Condition or Developmental Delay when AzEIP Eligibility Decision is Yes.

   A. When Established Condition is selected, Eligibility Decision Based on will be automatically selected as Records. Also, user must select one or more values for Select All Established Conditions that Apply.

   B. When Developmental Delay is selected, user must select Eligibility Decision Based On. Also, user must select one or more values for Select All Developmental Delays that Apply: (50% Developmental Delay or 2 Standard Deviations).

3. Click on Save to save eligibility details successfully.

If AzEIP eligibility redetermination is No, keep the original AzEIP eligibility date and reason and exit the record with reason “No longer eligible for Part C prior to reaching age three”.

CHAPTER 12: IFSP INFORMATION

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

12.0 IFSP Information

IFSP Information page allows users to create Interim/Initial/Other Review/6 month/Annual IFSPs and enter services to IFSP. IFSP can only be entered in a record if:

1. Primary Insurance has been entered in the Insurance Consent page.
2. Child is AzEIP eligible and eligibility information has been entered in the Eligibility page.
3. Team Lead has been assigned in the Assign/Change Team Members page.

12.1 Video link on how to enter IFSP

The link is located at the top of the IFSP Information page.

Steps to watch video on IFSP

1. Click on IFSP Information link from Additional Data section at the bottom of the child record.

1. Click on Click Here for a Video on how to enter the IFSP.
2. User will be redirected to DES website.
3. Click on How do I enter an IFSP in I-TEAMS?
4. Click on Watch a video tutorial on how to enter an IFSP in I-TEAMS.

12.3 Create IFSP

IFSP must be saved successfully to enter services in IFSP. User must close active IFSP to enter new IFSP by clicking Close Active IFSP & Create New. All closed IFSPs will be displayed after active IFSP. Closed IFSPs are displayed with IFSP Type, IFSP date and DDD ISP date on the left and the IFSP service details on the right.

Steps to create Initial/Interim IFSP

Note: Each field with an asterisk (*) is required.

1. Click on the IFSP Information link from the Additional Data section at the bottom of the child record.
2. *Select IFSP Type.
3. *When IFSP type is selected as Interim, user must enter Interim IFSP Date. When IFSP type is selected as Initial, user must enter Initial IFSP Date.
4. Initial IFSP Date is a read-only field and will be auto populated with IFSP date when Initial IFSP is saved successfully.
5. Team Lead is auto populated from Assign/Change Team Member page.
6. 45 day Delay Reason will be auto populated from eligibility page if IFSP Date saved is more than 45 days past Referral Date.

   Note: User must select 45 day Delay Reason if AzEIP eligibility date is within 45 days but Initial IFSP date is more than 45 days.
7. Click on Save IFSP to save IFSP successfully.
8. DDD ISP Date field will be displayed only if the child is DDD Eligible. First Initial IFSP created in I-TEAMS after child's DDD eligibility date is auto populated as DDD ISP date.
9. Once IFSP is saved successfully, proceed to enter IFSP services.

Steps to create 6 Month Review/Other Review/Addendum/Annual IFSP

Note: Each field with an asterisk (*) is required.

1. User must close active/open IFSP to enter new IFSP. Verify all information entered in active IFSP is accurate before closing.
2. Click on Close Active IFSP & Create New.
3. I-TEAMS will display a pop-up Warning message to check if all the information entered on active IFSP is accurate.
   A. Click on YES to close active IFSP if all information has already been reviewed and verified. Proceed to Step 4 to enter new IFSP and services.
   B. Click on NO to go back to active IFSP to check and make changes if necessary. Then click on Close Active IFSP & Create New button to close the IFSP.

4. *Select IFSP type.
5. * When IFSP Type is 6 Month Review, user must enter 6M Review IFSP Date. When IFSP type is Other Review, user must enter Other Review IFSP Date. When IFSP type is Annual, user must enter Annual IFSP Date.
6. Click on Save IFSP to save successfully.
7. DDD ISP Date field will be displayed only if the child is DDD Eligible. First IFSP created in I-TEAMS after child's DDD eligibility date is auto populated as DDD ISP date.
8. Once IFSP is saved successfully, proceed to enter IFSP services IFSP.

Steps to Enter IFSP Services

Note: Each field with an asterisk (*) is required.

1. Click on Add New Service. This button will be enabled only when IFSP is successfully saved.
2. *Select Service.
3. *Select Discipline.
4. *Select service Frequency:
    A. Select Frequency (daily, weekly, monthly, etc.) from first drop-down list. If Other is selected as Frequency, then user must enter Number of Sessions of the service that will be provided.
    B. Select duration (30 min, 45 min, 60 min, etc.) from second drop-down list.
5. *Select Service Setting. If Other is selected, user must enter type of location.
6. *Enter Planed Start Date.
7. *Enter Planned End date.
8. Select all Funding Sources as recorded in the paper IFSP. User is recommended to select at least one Funding Source.
9. Click on Add Service.
10. Repeat steps above to add each IFSP service.

Steps to Edit active IFSP

Note: IFSP should be edited only if an error was made or to add any missing information.

1. Edit IFSP details.
   A. Select IFSP Type.
   B. Enter IFSP date.
   C. Click on Save IFSP.
2. Edit IFSP services details.
   A. Click on Edit on the service.
   B. Make necessary changes in Service Delivery entry.
   C. Click on Apply to save changes successfully.
   D. Click on Cancel to cancel changes.

CHAPTER 13: CHILD INDICATOR SUMMARY

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

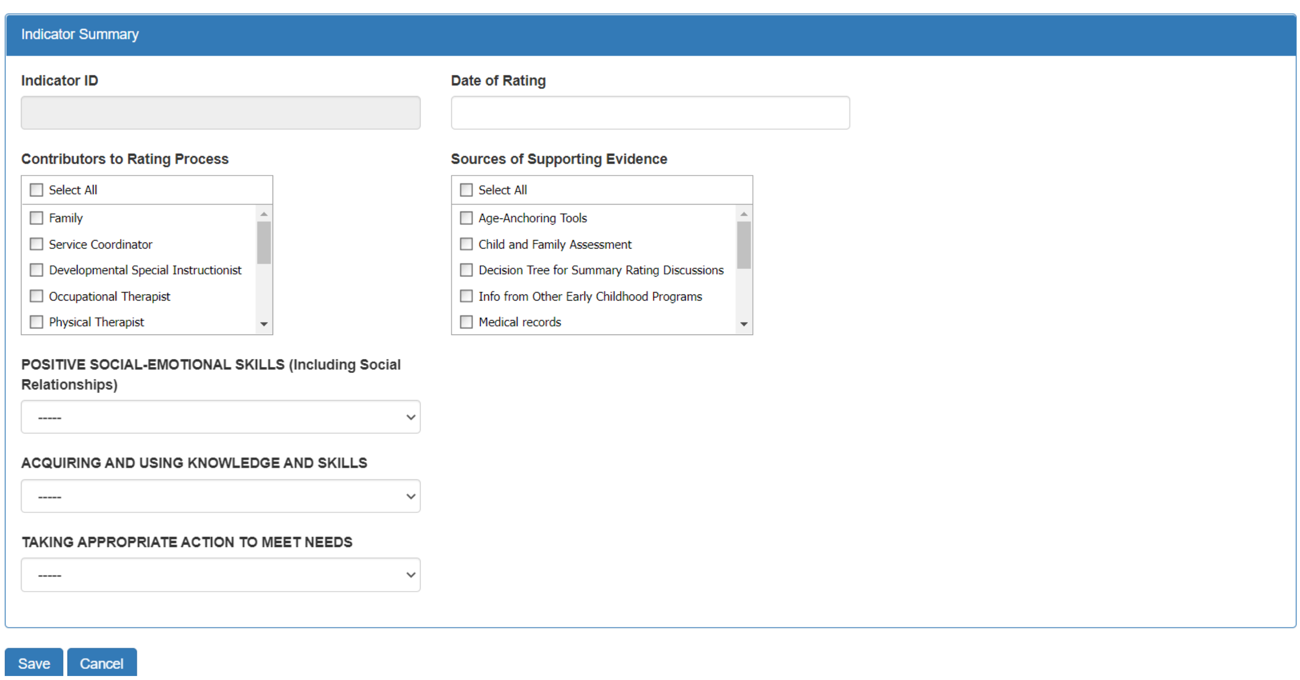
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

13.0 Child Indicator Summary

Child Indicator Summary page allows the user to save the child's progress indicator ratings including entry and exit indicators. Users can enter Indicators only if a child's AzEIP eligibility is saved.

13.1 Child Indicator Summary

Users can enter child’s entry indicator ratings first and later enter subsequent progress indicator ratings. I-TEAMS will automatically calculate the entry indicator from the earliest indicator rating entered even if it occurred during a previous referral. I-TEAMS will automatically calculate the exit indicator when the record has been exited as long as there are two or more child indicator ratings entered.



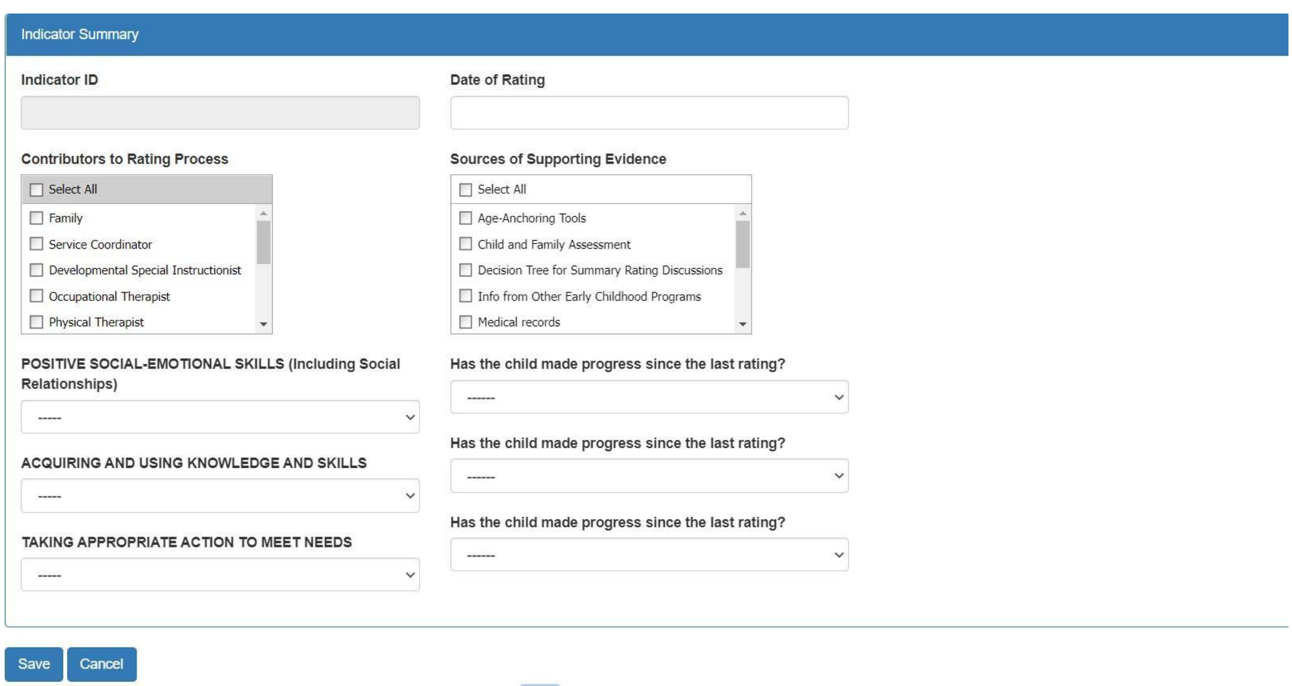
Steps to Enter Child Entry Indicator Summary

Note: Each field with an asterisk (*) is required.

1. Click on Child Indicator Summary link from the Additional Data section at the bottom of the child record.
2. *Enter Date of Rating.
3. *Enter Contributor's to Rating process.
4. *Enter sources of supporting evidence.
5. *Select rating for POSITIVE SOCIAL-EMOTIONAL SKILLS (Including Social Relationships).
6. *Select rating for ACQUIRING AND USING KNOWLEDGE AND SKILLS.
7. *Select rating for TAKING APPROPRIATE ACTION TO MEET NEEDS.
8. Click on Save to successfully save Child Entry Indicator Summary ratings.
9. Click on Cancel to cancel changes.

13.2 Child Progress Indicator Summary

Users can enter progress indicator ratings after the Entry Indicator is saved.



Steps to Enter Child Progress Indicator Summary

Note: Each field with an asterisk (*) is required.

1. Click on Child Indicator Summary link from Additional Data section at bottom of the child record.
2. *Select Date of Rating.
3. *Enter Contributor's to Rating process.
4. *Enter sources of supporting evidence.
5. *Select rating for POSITIVE SOCIAL-EMOTIONAL SKILLS (Including Social Relationships).
6. *Select Has the child made progress since the last rating?
7. *Select rating for ACQUIRING AND USING KNOWLEDGE AND SKILLS.
8. *Select Has the child made progress since the last rating?
9. *Select rating for TAKING APPROPRIATE ACTION TO MEET NEEDS.
10. *Select Has the child made progress since the last rating?
11. Click on Save to successfully save Child Progress Indicator Summary ratings.
12. Click on Cancel to cancel changes.

13.3 Review and Edit Indicator Summary

User can view all indicators at the bottom of the Child Indicator page. Number Of Records to View allows user to view more and older child indicator entries on the record. Each Indicator rating displays details including:

A. Indicator ID - each Indicator entry is associated with a unique ID.
B. Indicator Name – identifies Entry or Progress Indicator and associated referral.
C. Date of Rating
D. Positive Skills (Positive Social-Emotional Skills)
E. Child Made Progress?
F. Acquiring Skills

G. Child Made Progress?

H. Appropriate action?

I. Child Made Progress?

J. Contributor

K. Supporting Evidence

Number Of Records to View: 10

	Indicator ID	Indicator Name	Date Of Rating	Positive Skills	Child Made Progress?	Acquiring Skills	Child Made Progress?	Appropriate Action	Child Made Progress?	Contributor	Supporting Evidence
Edit	29599	Progress - Referral 2	2/24/2022	6	Yes	7	Yes	6	Yes	Family	Child and Family Assessment
	29598	Progress - Referral 1	2/23/2022	7	Yes	6	Yes	7	Yes	Family	Child and Family Assessment
	38791	Entry - Referral 1	1/30/2022	7	------	7	------	3	------	Developmental Special Instructionist	Age-Anchoring Tools

Steps to Edit Child Indicator entry

Note: Edits can only be completed on indicator entries associated with current referral. If necessary, support for editing or deleting child indicator ratings from current or previous referrals should be sent to the AzEIP Help Desk.

1. Click on Edit.
2. Make necessary changes in Child Indicator entry.
3. Click on Apply Edit to save changes successfully.
4. Click on Cancel to cancel changes.

CHAPTER 14: SERVICE DELIVERY

REVISION DATE: December 2023

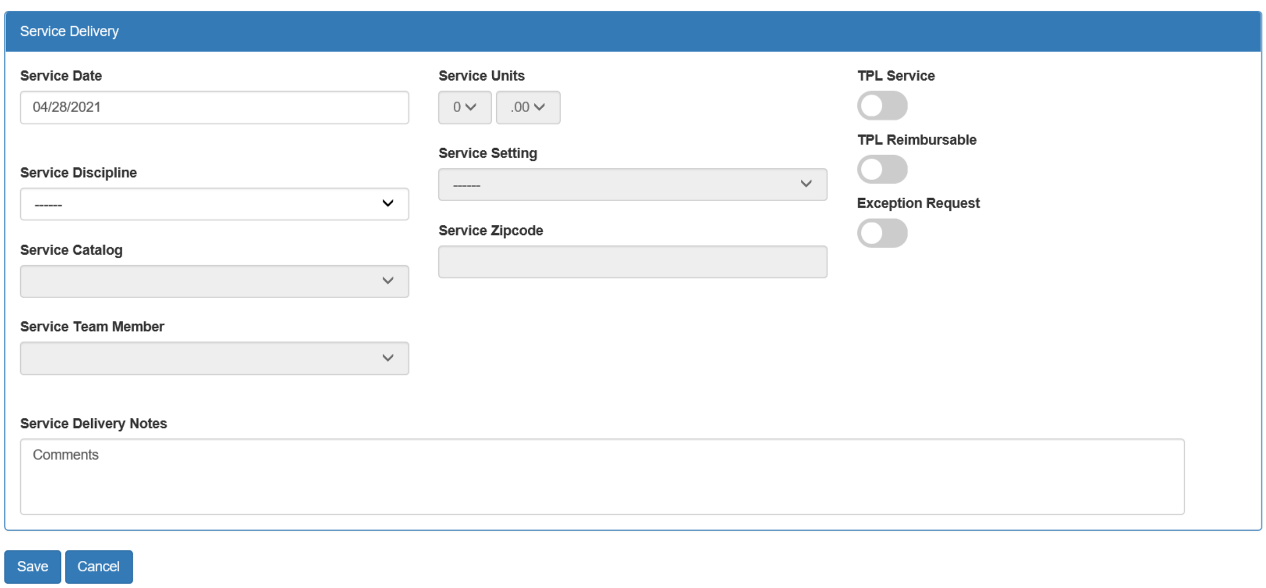
EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

14.0 Service Delivery

Users can enter all services delivered to or on behalf of a child and family in the Service Delivery page. Service Delivery page also allows users to view previous service delivery entries.

Note: Please refer to AzEIP Billing Manual for more information.



Steps to enter Service Delivery

Note: Each field with an asterisk (*) is required.

1. Click on Service Delivery link from Additional Data section at bottom of the child record.
2. *Enter Service Date.
3. *Select Service Discipline.

4. *Select Service Catalog.
    A. List of Service items are displayed according to Discipline selected.
    B. When a Service item with –-[IFSP]-- is selected, IFSP Service field will be displayed with list of IFSP services for selected Discipline in IFSP. For example, if OT is dual role and IFSP is saved with OT – OT and SC - OT then user will see OT and SC.
5. *Select Service Team Member. If Service Team Member is selected as Non-Team Member then enter Non-Team Member Full Name.
6. *Select Service Units.
7. Enter Service Amount if applicable.
8. Select Service Setting.
9. *Service Zipcode will be auto populated with zip code of active Child Address from Child Demographics page when Home or Other is selected as Service Setting. User can change it if applicable.

    Note: If the service delivery entry is after record is transferred to different region, please update Service Zipcode with correct zip code in which service was provided to avoid billing denials.
10. *Select Service Method. If Service Method is selected as Alternative, then select Alternate Method.
11. TPL Service will be Yes for all TPL billable services regardless of Discipline.
12. TPL Reimbursable will be Yes/No based on below table. TPL reimbursable services are PT, OT, and SLP services that are billable to Insurance if family has provided consent and waiver is not in place. Services will be available in Third Party Liability page only when Is TPL Reimbursable is Yes.

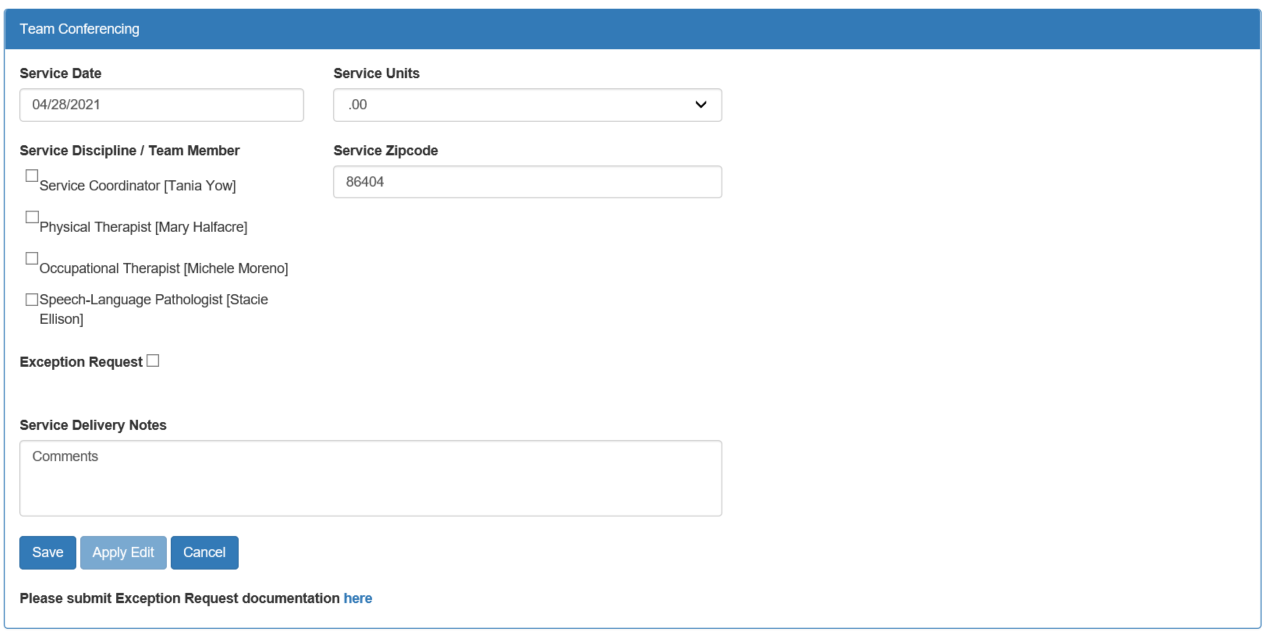
TPL Service	Active/Historical Insurance	Active/Historical Waiver	TPL Reimbursable
Yes	Yes	Yes	No
Yes	Yes	No	Yes
Yes	No	---	No
No	N/A	N/A	No

Note: If Service Catalog item is Evaluation, TPL Reimbursable will default to No.

User can change it to Yes if planning to bill TPL for the service.

13. Approved Waiver will be auto populated Yes or No based on active/historical waivers. Waiver will be displayed only if TPL service is Yes.
14. Select Exception Request to Yes if applicable. If Exception Request is selected as Yes, then select AzEIP Approval Status as Requested and Non-Billable Reason. Non-Billable reason can be obtained by running Invoice.
15. Enter Service Delivery Notes if applicable.
16. Click on Save to save successfully.
17. Click on Cancel to cancel service delivery entry.

14.1 Team Conferencing



Steps to enter Team Conferencing

Note: Each field with an asterisk (*) is required.

1. Click on Team Conferencing.
2. *Select Service Date.
3. *Select all applicable Service Discipline / Team Member.
4. Select Exception Request if applicable. If Exception Request is selected, then

select AzEIP Approval Status as Requested and Non-Billable Reason. Non-Billable reason can be obtained by running Invoice.

5. Enter Service Delivery Notes if applicable.
6. *Select Service Units.
7. Service Zipcode will be auto populated with zip code of active Child Address from Child Demographics page. User can change zip code if applicable.
8. Click on Save to successfully save Team Conferencing.
9. Click on Back to Service Delivery to go back to the Service Delivery page.

14.2 Review and Edit Service Delivery entry

Number Of Records to View: 25

	Service ID	Date	Discipline	Service	Provider	IFSP Service	
Reviewed	3002144	12/2/2020	Service Coordinator	Service Coordination Non Direct	Kallie Chavez		Units: 0.75 Not IFSP Location: 85043 Setting: Other TPL Service: No TPL Reimbursable: No 12/3/2020 9:44:58 AM [Liz Pinney] During IPP
Edit	3037794	12/2/2020	Service Coordinator	Data Entry	Kallie Chavez		Units: 0.25 Not IFSP Location: 85043 Setting: Other TPL Service: No TPL Reimbursable: No
Reviewed	2975305	11/2/2020	Service Coordinator	Service Coordination Non Direct	Kallie Chavez		Units: 0.25 Not IFSP Location: 85043 Setting: Other TPL Service: No TPL Reimbursable: No 11/3/2020 9:57:37 AM [Liz Pinney] During IPP
Reviewed	2973285	10/28/2020	Service Coordinator	Service Coordination Non Direct	Kallie Chavez		Units: 0.25 Not IFSP Location: 85043 Setting: Other TPL Service: No TPL Reimbursable: No 10/29/2020 1:57:59 PM [Liz Pinney] During IPP

Default view allows user to view up to 25 service delivery entries in child record in this section. Number Of Records to View allows user to view more and older service delivery entries. Each Service Delivery entry displays details including:

A. Status of Service Delivery shows if the service has been invoiced or not.
   a. Edit - If the service is not invoiced.
   b. Pending - If Invoice is saved to Draft
   c. Reviewed - If Invoice has been submitted successfully.
   d. Reversed - If a Reversal has been Approved.
   e. Reversed Pending - If Invoice with Reversals is saved to Draft.
   f. Reversed Reviewed - If Invoice withReversals is submitted successfully.
B. Service ID- each Service Delivery entry is associated with a unique ID.

C. Date of Service Delivery.

D. Discipline of the provider.

E. Service Catalog.

F. Name of the Provider.

G. IFSP Service from the IFSP page where units are deducted. This field will be blank for Non IFSP services.

H. Units will be displayed in blue color when it is a Reversal.

I. Remaining or Not IFSP explains whether or not service is pulling units from IFSP. IFSP services pull units from IFSP and display remaining units. IPP and Non IFSP services are marked as Not IFSP.

J. Location Zip Code.

K. Service Setting.

L. Whether or not service is TPL or regular.

M. Whether or not TPL Reimbursable.

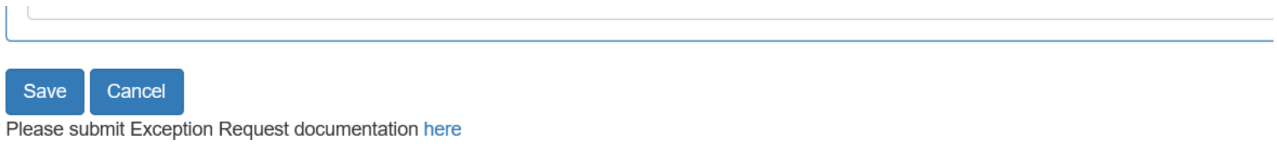
Steps to Edit Service Delivery entry

Note: Service delivery entries can be edited only if the service is not invoiced.

1. Click on Edit.
2. If the Service Delivery entry is Team Conferencing, the user will be redirected to the Service Delivery Team Conferencing page.
    A. Make necessary changes in Team Conferencing page.
    B. Click on Apply Edit to save changes successfully.
    C. Click on Cancel to cancel changes.
3. Make necessary changes in Service Delivery entry.
4. Click on Apply Edit to save changes successfully.
5. Click on Cancel to cancel changes.

14.3 Exception Request Documentation Submission

This feature allows user to submit exception request documents through I-TEAMS. User can submit documents of regular and TPL services documents from the Service Delivery page and for Team Conferencing services from the Team Conferencing page.



Steps to submit Exception Request documentation

Note: Each field with an asterisk (*) is required.

1. Click on **here** either from Service Delivery page or from Team Conferencing page.
2. *Enter Email.
3. *Enter Program Name.
4. *Enter Region.
5. *Enter I-TEAMS ID.
6. Enter Service Delivery ID.
7. Select Service Month.
8. Click on Next.
9. Upload documentation files.
10. Enter any additional Information.
11. Select Send me a copy of my responses if needed.
12. Click on Submit.

CHAPTER 15: TRANSFER CHILD

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

15.0 Transfer Child

Transfer Child page allows user to facilitate transfer of a child record from one contract or region to another. In order to transfer the child to another program the child must have an open record and must have a Service Coordinator/contract provider assigned. RSK will support service providing agencies with identifying the appropriate contract provider to transfer the record when a family moves. AzEIP staff may become involved in transfers when there is a dispute with the family.

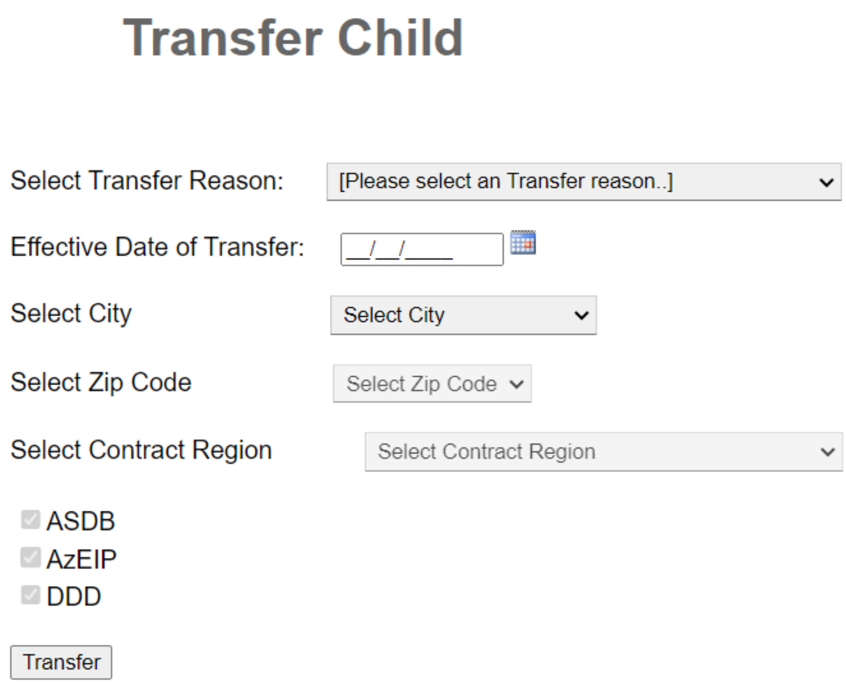
Child's record transfer will only be complete if:

1. Transferring Contractor initiates the transfer through Transfer Child page (at which time Status of record will change from Open to Pending Transfer).
2. Receiving Contractor acknowledges transfer (at which time Status of record will change from Pending Transfer to Open).

   Note:

A. Transferring Contractor will be able to access child record for 90 days after the transfer has been acknowledged by the receiving Contractor so that the sending Contractor can complete data entry and billing for services they provided before the transfer.

B. Do not end date Transferring Contractor in Assign Team Member page during transfer, this will automatically occur when Transfer is completed.



Steps to initiate child record transfer in Transfer Child page

Note: Each field with an asterisk (*) is required. This step to be completed by Transferring Contractor

1. Click on Transfer Child link from Additional Data section at bottom of the child record.
2. Current Organization Name is auto populated with full name of the organization assigned to the child record.
3. *Select Transfer Reason.
4. *Enter Effective Date of Transfer. This date will become Assignment End Date for the transferring Contract and team members in Assign/Change Team Members page once the transfer is complete. This will also become Effective End Date of all active Waivers in Insurance/TPL Waiver page.
5. *Select City where child record is transferring to.
6. *Select Zip Code related to the selected City.
7. *Select Contract Region. Contract Region will be displayed based on the zip code selected.

8. All agencies associated with the child record are auto selected.
9. Click on Transfer.
10. I-TEAMS will display a pop-up message to confirm Transfer Child Record.
    A. Click on YES to procced to Transfer Child Record.
    B. Click on NO to keep child record open.
11. Click on OK on the confirmation pop-up message.

Steps to acknowledge the transfer in Search for Referral Match page

Note: This steps to be completed by newly assigned Contractor

1. Click on Search for Referral Match link on left navigation pane.
2. Enter at least three fields to search for child record.
3. Click on Search.
4. Click on Pending Transfer.
5. Click on Acknowledge Transfer. Child Record Status will change to Open.

Note: If the child is DDD and/or ASDB eligible, and the newly assigned service providing agency is a different DDD unit and/or ASDB Regional Provider, please work with currently assigned DDD SC and/or ASDB assignment on the Assign Team Members page, to determine when the current DDD unit or ASDB region should be end dated before re-assigning to new DDD unit and/or ASDB Regional Provider.

CHAPTER 16: TRANSITION CHILD

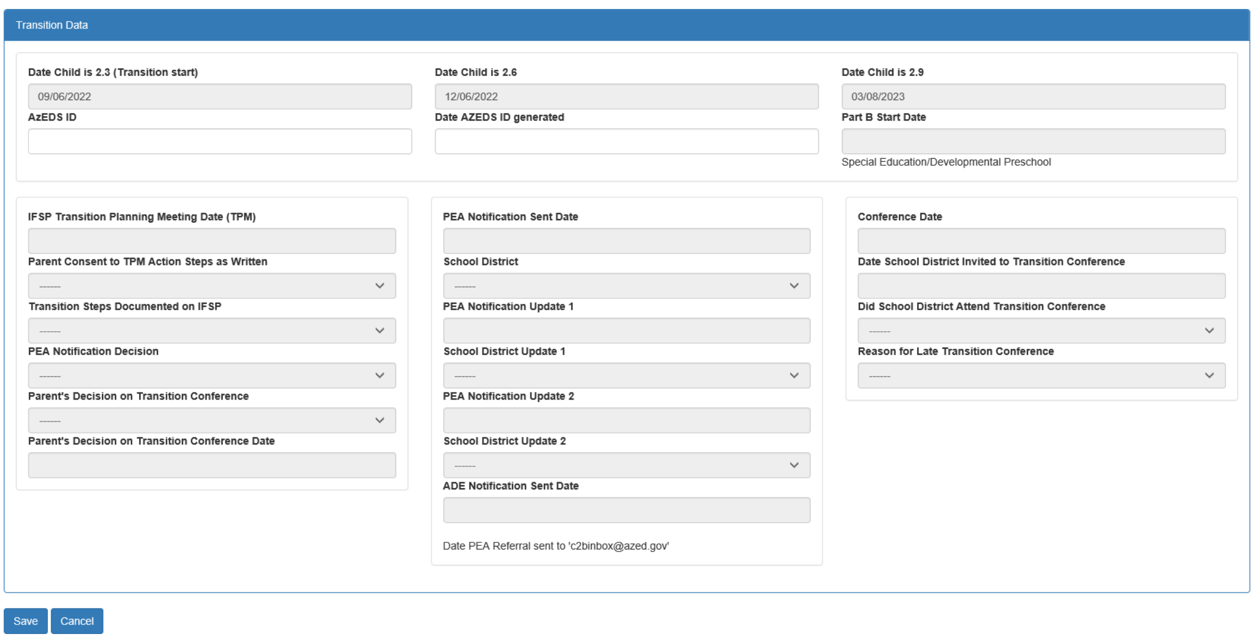
REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

16.0 Transition Child

Transition Child page allows user to save data required for smooth transition from early intervention to preschool or other appropriate services at or around the date the child turns three years old.



Steps to complete Transition Child page

Note: Each field with an asterisk (*) is required.

1. Click on Transition Child link from Additional Data section at bottom of the child record.
2. Date Child is 2.3 (Transition Start) is a read-only field and is auto calculated from Child's DOB.

3. Date Child is 2.6 is a read-only field and is auto calculated from Child's DOB.
4. Date Child is 2.9 is a read-only field and is auto calculated from Child's DOB.
5. AzEDS ID is a unique ID from the Az Dept. of Education and is an auto populated field.
6. Date AzEDS ID generated is the date when AzEDS ID is generated with the Az Dept. of Education in I-TEAMS.
7. Enter Part B Start date if known.

   Note: Leave Part B start date as blank if child has not started in Part B.
8. Enter IFSP Transition Planning Meeting (TPM) Date.
9. Select Parent Consent to TPM Action Steps as Written.
10. Select Transition Steps Documented on IFSP.
11. Select PEA Notification Decision.
12. Select Parent's Decision on Transition Conference.
13. Enter Parent's Decision on Transition Conference Date.
14. Enter PEA Notification Sent Date.
15. Select School District.
16. Enter ADE Notification Sent Date which is the date PEA Notification sent to 'c2binbox@azed.gov'.
17. Enter Conference Date.
18. Enter Date School District Invited to Transition Conference.
19. Select Did School District Attend Transition Conference.
20. Select Reason for Late Transition Conference.
21. Click on Save Transition Data to save information successfully.

Note: If there is any change in Parent's Decision on Transition Conference after the child is 2 years and 9 months, enter Reason for Late Transition Conference, but DO NOT update parent decision or decision date.

Questions about how to document a unique situation should be referred to the AzEIP Data Manager.

Steps to Edit and Update Transition Child information

Note: Please do not change PEA Notification sent Date and School District if the notification has been sent. Please use the Update 1 and 2 sections.

If PEA Notification Decision changes, document in the SC notes and Child Demographics Comments section in I-TEAMS.

Questions about how to document a unique situation should be referred to the AzEIP Data Manager.

1. Click on Transition Child link from Additional Data section at bottom of the child record.
2. Enter PEA Notification Update 1, if applicable.
3. Select School District Update 1, if applicable.
4. Enter PEA Notification Update 2, if applicable.
5. Select School District Update 2, if applicable.
6. Click on Save to save information successfully.

CHAPTER 17: EXIT CHILD RECORD

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

17.0 Exit Child Record

Exit Child Record page allows the user to exit the child record by saving the child's Reason for Exit and Exit Date. Prior to exiting, the service providing agency should ensure that all data have been entered. If a child indicator summary rating has not been entered within the last 6 months, either a new one will need to be entered or a reason for not completing the child indicator rating will need to be entered on the exit page. A child may exit the AzEIP program for many reasons including moving out of state, transitioning to Part B preschool, etc.

Steps to Exit Child Record

Note: Each field with an asterisk (*) is required.

1. Click on the Exit Child Record link from Additional Data section at bottom of the child record.
2. *Select Reason for Exit. Available exit reasons are displayed based on whether or not an IFSP has been created.
3. *Enter Exit Date.
4. Click on Confirm Exit.

5. I-TEAMS will display a pop-up Warning message to prompt user to confirm that all required information in child record has been entered accurately.
    A. Click on NO to keep child record open and user can check that all information in child record is entered correctly or can make changes if necessary.
    B. Click on YES to exit child record if all information has already been reviewed and verified.

Steps to Exit duplicate Child Record

Note: Each field with an asterisk (*) is required.

1. Go to Child Demographics page.
    A. Add a comment in the Comments section that the record is a duplicate record and mention the original record's I-TEAMS ID.
    B. Click on Save Comment.
2. Click on Exit Child Record link from Additional Data section at bottom of the child record.
3. Select Duplicate Referral as Reason for Exit.
4. Enter Exit Date.
5. Click on Confirm Exit.
6. I-TEAMS will display a pop-up Warning message to prompt user to confirm that all required information in child record has been entered accurately.
    A. Click on NO to keep child record open to record duplicate and original I-TEAMS ID in the Child Demographics Comments section.
    B. Click on YES to exit child record if all information has already been reviewed and verified.

CHAPTER 18: COMPLIANCE DECISIONS

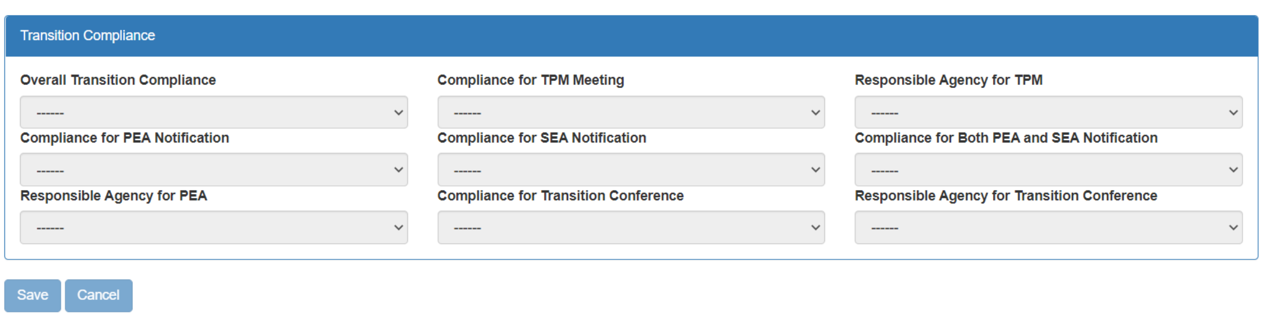
REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

18.0 Compliance Decisions

Transition Compliance data will be listed in the Compliance Decisions page when the AzEIP office enters the data after all transition fields have been entered or after the child is older than 2.9


Transition Compliance

Overall Transition Compliance	Compliance for TPM Meeting	Responsible Agency for TPM
------	------	------
Compliance for PEA Notification	Compliance for SEA Notification	Compliance for Both PEA and SEA Notification
------	------	------
Responsible Agency for PEA	Compliance for Transition Conference	Responsible Agency for Transition Conference
------	------	------

Save Cancel

Please contact Helpdesk for assistance if data needs to be corrected.

CHAPTER 19: RE-OPEN CHILD RECORD

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

19.0 Re-Open Child Record

Exited child records can be Re-Opened depending on the child's AzEIP Eligibility details and status of IFSP during previous referral. After a record is Re-Opened, the Referral Date will be same as previous Referral Date.

Table below describes conditions on which I-TEAMS displays Re-Open Child Record link on exited records.

Incoming Re- referral in less than 30 days	**Child was previously AZEIP Eligible**	**IFSP Exists in Previous referral**	**Active IFSP**	**Re-Open Record?**
Yes	Yes	No	N/A	**Yes**
Yes	Yes	Yes	Yes	**Yes**
Yes	Yes	Yes	No	**Yes**
Yes	Null	Null	Null	**Yes**
No	Yes	Yes	Yes	**Yes**

Steps to Re-open Child Record

Note: Each field with an asterisk (*) is required.

1. Click on Re-Open Child Record link from Additional Data section at bottom of the child record.
2. Exit Reason is an auto populated field that displays Reason for Exit from Exit Child Record page.
3. *Select Reason for Re-Opening.
4. Enter Describe Other Reason which will be displayed only when Other is selected as Reason for Re-Opening.
5. *Select Reopen Date. This date cannot be on or before the Exit Date.
6. Click on Re-Open.
7. I-TEAMS will display a pop-up message to confirm Re-Open child record.
    A. Click on YES to procced to Re-Open child record.
    B. Click on NO to cancel.
8. Click on OK on the confirmation pop-up message.

CHAPTER 20: RE-REFER CHILD RECORD

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

20.0 Re-refer Child Record

Exited child records can be Re-Referred depending on the child's AzEIP Eligibility details and status of IFSP during previous referral. Re-Referred records will get a new Referral Date. Once the record is Re-referred, we cannot convert it to a Re-open status.

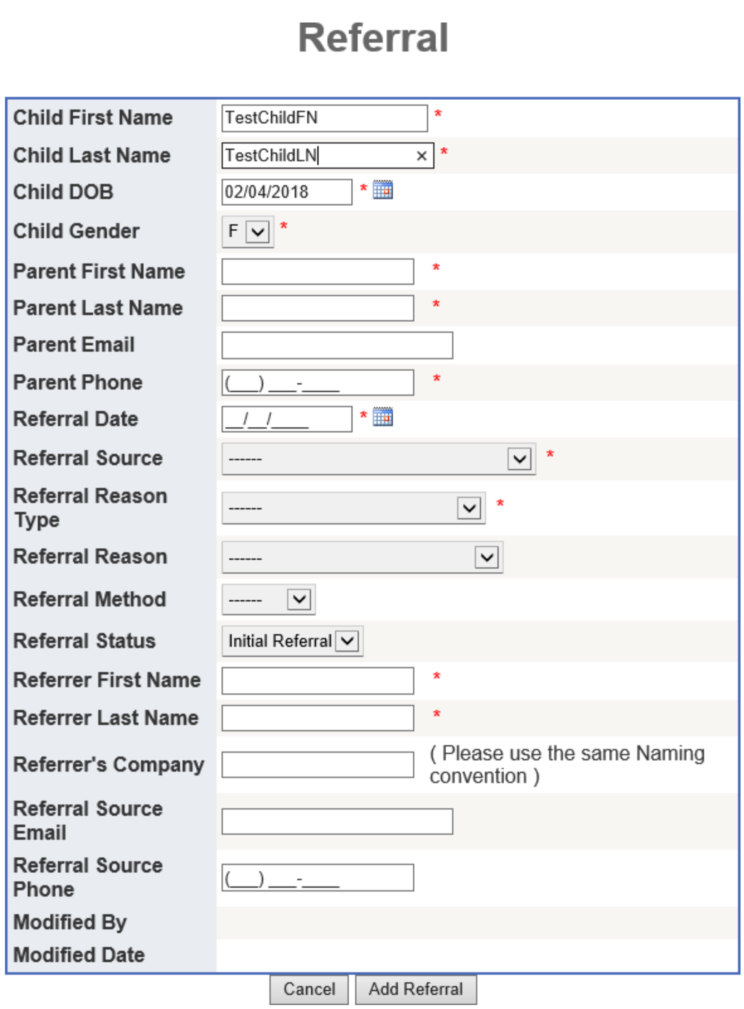


Table below describes conditions on which I-TEAMS displays Re-Refer Child Record link on exited records.

Incoming Re- referral in less than 30 days	**Child was previously AZEIP Eligible**	**IFSP Exists in Previous referral**	**Active IFSP**	**Re-Refer Record?**
Yes	No	N/A	N/A	**Yes**
No	Yes	Yes	No	**Yes**
No	Yes	No	N/A	**Yes**
No	No	N/A	N/A	**Yes**
No	Null	N/A	N/A	**Yes**
No	Yes	N/A	N/A	**Yes**

Steps to Re-Refer Child Record

Note: Each field with an asterisk (*) is required.

1. Click on Re-Refer Child Record link from Additional Data section at bottom of the child record.
2. Child FirstName, Child LastName, Child DOB and Child Gender are auto populated.
3. *Enter Parent First Name.
4. *Enter Parent Last Name.
5. Enter Parent Email.
6. *Enter Parent Phone.
7. *Enter Referral Date.
8. *Select Referral Source.
9. *Select Referral Reason Type. When Referral Reason Type is selected, Referral Reason list will change accordingly.
10. Select Referral Reason.
11. Select Referral Method.
12. Referral Status is auto populated.

13. *Enter Referrer First Name.
14. *Enter Referrer Last Name.
15. Enter Referrer's Company. Please use same Naming convention for referrer companies.
16. Enter Referral Source Email.
17. Enter Referral Source Phone.
18. Click on Cancel to erase all the information entered without saving it.
19. Click on Add Referral to save.
20. If I-TEAMS does find a possible match, Child ID, Name, DOB, Gender, Referral Date, Child Status of the record (Open/Exited) and Adult Name will be displayed at the bottom of the page.
21. Click on Add New Referral to open the record. Record will have new Referral Date but same I-TEAMS ID.
22. Record added successfully message will be displayed.
23. Click on Child Demographics to proceed to completion of the referral.

CHAPTER 21: THIRD PARTY LIABILITY

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

21.0 Third Party Liability

All services marked as TPL Reimbursable-Yes in Service Delivery page will be available in Third Party Liability page. Once Insurance Company has responded, the user must enter the Insurance company decision and other details in the TPL page before submitting TPL Invoice.

21.1 Third Party Liability search

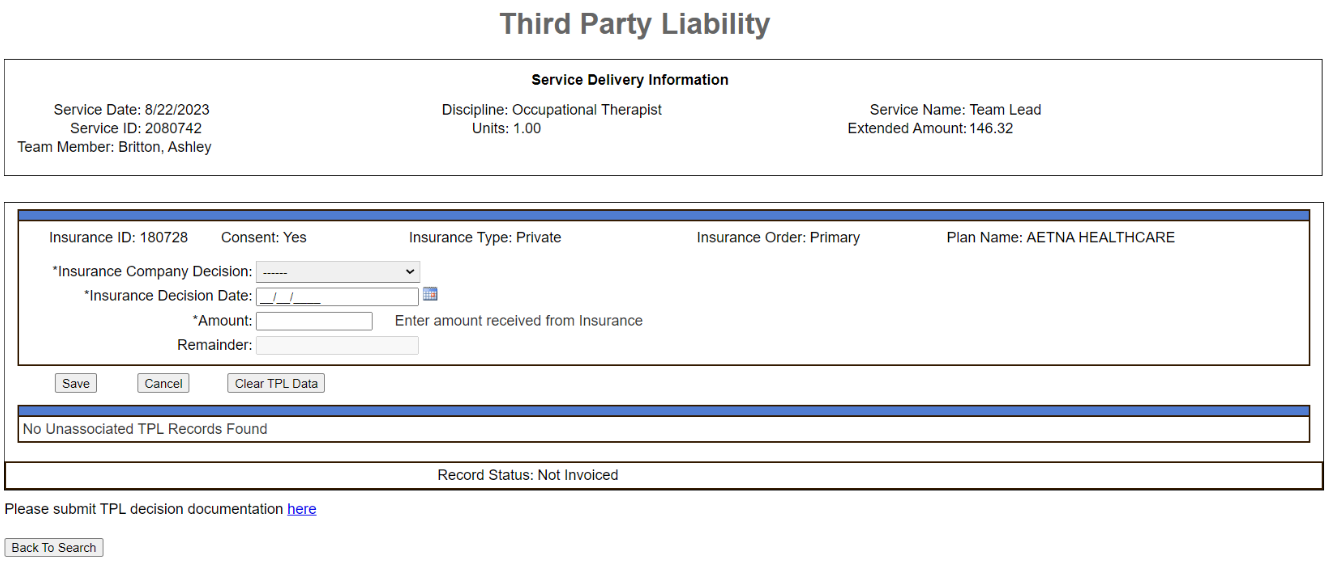
Users can search for TPL services using any of the available search fields. Search results will display I-TEAMS ID, Child name, Service Date, Service, Provider and Invoice Status. If TPL Invoice has been submitted, Invoice status will be displayed as Reviewed, otherwise it shows as Not Invoiced. Users must click on Select to open TPL service page to enter TPL information.

Steps to search for TPL

1. Click on Third Party Liability link from the left navigation pane.
2. Enter value on any available search fields.
3. Click on Search.
4. Click on Select to open TPL service page to enter TPL information.

21.2 TPL information entry

Users can enter Insurance Company Decision, Decision Date and Amount reimbursed, etc. in TPL page and then proceed to submit TPL Invoice.



Steps to enter TPL information

Note: Each field with an asterisk (*) is required.

1. *Select Insurance Company Decision. When Insurance Company Decision is selected as Denied, user must select Reason For Denial

   Note: When Insurance Type is Public, Insurance Company Decision will display only Approved and Denied. Otherwise user will see Approved, Denied, Deductible, Co- Pay.

2. *Enter Insurance Decision Date.
3. *Enter Amount.
4. Click on Save All Active TPL Records to save successfully.
5. Remainder will be auto populated as Amount deducted from Extended Amount.

21.3 TPL decision Documentation submission

This feature allows users to submit TPL decision documents through I-TEAMS.

Steps to submit TPL decision documentation

Note: Each field with an asterisk (*) is required.

1. Click on **here** from Third Party Liability page.
2. *Enter Email.
3. *Enter Program Name.
4. *Enter Region.
5. *Enter I-TEAMS ID.
6. *Enter Service Delivery ID.
7. *Select Insurance.
8. Click on Next.
9. Click on Add file to upload all applicable EOB or other documentation files.
10. Enter any additional information the AzEIP office needs to know.
11. Click on Submit.

CHAPTER 22: CREATE INVOICE

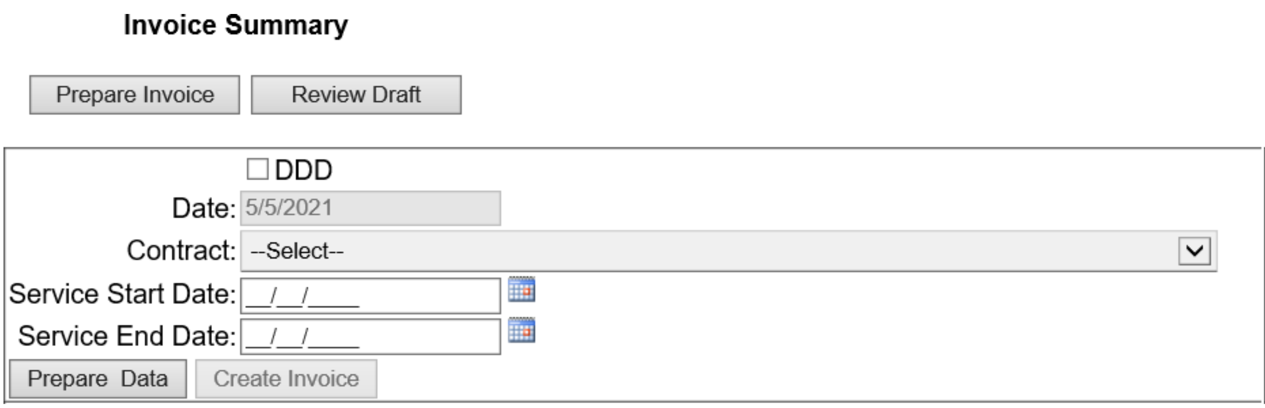
REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

22.0 Create Invoice

Once all service delivery entries have been entered, users can prepare and submit invoices. Users should submit Invoices for AzEIP only records and DDD records separately. Users can review all billable services before submitting the invoice and work on Non-billable services to make corrections.



Steps to Create Invoice

1. Click on Create Invoice link from left navigation pane.
2. Click on Prepare Invoice.
3. Select DDD if preparing Invoice for DDD funded services (DDD eligible children).
4. Select Contract.
5. Enter Service Start Date.
6. Enter Service End Date.
7. Click on Prepare Data.

8. Click on Create Invoice when the Prepare Data successful message is displayed.

Invoice Summary

Prepare Invoice | Review Draft

☐ DDD
Date: 4/18/2022
Contract: Dynamite Therapy LLC Graham& Greenlee& Cochise 2019-2024
Service Start Date: 03/01/2022
Service End Date: 03/31/2022
View 0 Non-Billable Services | View 0 TPL Services

Billable Total: $102.27 AzEIP TPL Total: $0.00
Reversals: ($46.02)
Net Billable: $56.25

	Service Date	Service ID	Child ID	Child Name	Child DOB	Agency(s)	Tier	IsIPP	IsIFSP	IFSP Date	Zip Code	Professional Provider	Service Location	Discipline	Service Units	Rate	Amount	Qualification	Service Catalog Name	Funding Source
Remove	3/2/2022	3391113	153326	[redacted]	[redacted]	----	3	True	False	N/A	85607	Anderton, Jennifer	Other	Service Coordinator	0.25	$61.36	$15.34	Bachelor	Service Coordination Non Direct	AzEIP
Remove	3/2/2022	3391140	184145	[redacted]	[redacted]	----	3	True	False	N/A	85607	Anderton, Jennifer	Other	Service Coordinator	0.25	$61.36	$15.34	Bachelor	Service Coordination Non Direct	AzEIP
Remove	3/1/2022	3390304	191117	[redacted]	[redacted]	----	Base	True	False	N/A	85613	Anderton, Jennifer	Other	Service Coordinator	0.25	$40.91	$10.23	Bachelor	Service Coordination Non Direct	AzEIP
Remove	3/1/2022	3390542	188931	[redacted]	[redacted]	----	3	True	False	N/A	85607	Anderton, Jennifer	Other	Service Coordinator	0.25	$61.36	$15.34	Bachelor	Service Coordination Non Direct	AzEIP
Remove	3/1/2022	3390567	188729	[redacted]	[redacted]	----	3	True	False	N/A	85603	Anderton, Jennifer	Other	Service Coordinator	0.25	$61.36	$15.34	Bachelor	Service Coordination Non Direct	AzEIP
Remove	3/1/2022	3391109	153326	[redacted]	[redacted]	----	3	True	False	N/A	85607	Anderton, Jennifer	Other	Service Coordinator	0.50	$61.36	$30.68	Bachelor	Service Coordination	AzEIP

	Service Date	Service ID	Child ID	Child Name	Child DOB	Agency(s)	Tier	IsIPP	IsIFSP	IFSP Date	Zip Code	Professional Provider	Service Location	Discipline	Service Units	Rate	Amount	Qualification	Service Catalog Name	Funding Source
Remove	1/19/2022	3380459	189840	[redacted]	[redacted]	----	3	True	False	N/A	85607	Anderton, Jennifer	Other	Service Coordinator	-0.50	$61.36	($30.68)	Bachelor	Service Coordination Non Direct	AzEIP
Remove	1/18/2022	3380457	189840	[redacted]	[redacted]	----	3	True	False	N/A	85607	Anderton, Jennifer	Other	Service Coordinator	-0.25	$61.36	($15.34)	Bachelor	Service Coordination Non Direct	AzEIP

Gross Billable: $102.27 Reversals: ($46.02) Net Billable: $56.25 TPL Billable: $0.00

Save Draft

Note:

- *Top section is for all the regular Invoice lines and bottom section is for all the Reversals.*
- *Amount in parentheses indicates negative amount.*
- *Invoice can be submitted only if the Net Billable is a positive amount. If the Net Billable is a negative amount, Click on Remove on Reversal Services to make the Net billable a positive value.*

9. Click on View Non-Billable Services to review non-billable services.
10. Click on Save Draft.
11. Click on Review Draft.
12. Select Contract.
13. If there are multiple Invoices to be submitted under the selected contract, the user must select Invoice number. Otherwise Invoice Number will be auto populated.
14. Click on Retrieve Draft.
15. Click on Export to Excel to save Invoice to excel document.
16. Click on Submit to submit Invoice successfully.

CHAPTER 23: REVIEWED INVOICES

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

23.0 Reviewed Invoices

Users can view full details of all Reviewed Invoices including regular and TPL for both AzEIP and DDD under their contract in the Reviewed Invoices page. It will display the date when Invoice was submitted, list of services, Billable total, Reversals, and Net billable amounts.

Steps to view Reviewed Invoices

1. Click on the Reviewed Invoices link from the left navigation pane.
2. Select DDD for DDD funded invoices.
3. Select Invoices.
4. Click on Get Details.
5. Click on Get Excel File to open/save the Invoice details in Excel document.
    A. Click on Open to open the file in Excel format.
    B. Click on Save to save the file in the user's local computer.

CHAPTER 24: DATA UPLOAD

REVISION DATE: December 2023

EFFECTIVE DATE: December2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

24.0 Data Upload

Data Upload section allows users to upload bulk data to I-TEAMS using the available template. This minimizes time consumed on data entry on each child record.

24.1 Service Delivery Data Upload

Service Delivery Data Upload is used to upload many different service deliveries into I-TEAMS child records at one time. Users can enter up to 500 service deliveries into one file. Team Conferencing services cannot be entered through the Service Delivery Data Upload at this time.

Steps to upload Service Delivery Data

1. Download Service Delivery Bulk Upload Template.
   A. Click on Data Upload from Home Page.
   B. Download Service Delivery Bulk Upload Template.
   C. Click on Open to view the template.
2. Enter Service Delivery Data.
   A. Enter data from left to right as many cells are dependent upon preceding cells.
   B. Save the file locally with a name and in a location on the local drive that will help should the user need to review the information at a later date.
3. Upload Bulk Service Delivery Data.
   A. Click on Choose File.
   B. Select file to be uploaded.

C. Click on Upload Bulk Service Deliveries. When successfully saved a message will be displayed indicating that it has been saved.

4. Users will get an Initial Response email to their Registered email ID with file details such as Input file name, Number of good (records that appear to have data entered in valid formats but have not yet gone through the rules in I-TEAMS) and bad records (service delivery entries will not be entered based on incorrect format of the data).Also the email will contain an attachment of the received file. Users can review the initial response column in the attachment to review/correct bad data and upload the corrected data again on a new Service Delivery Bulk Upload template.

5. Users will get a Final Response email to their Registered email ID with a file attachment with service delivery IDs for the successfully created service delivery entries. Final Response column in the will also give opportunities for the users to correct further bad data if any that's blocking system to create service delivery ID's (for example a child ID that doesn't exist, team member not assigned to a particular child, invalid date for that child's record, etc.).

CHAPTER 25: REVERSALS

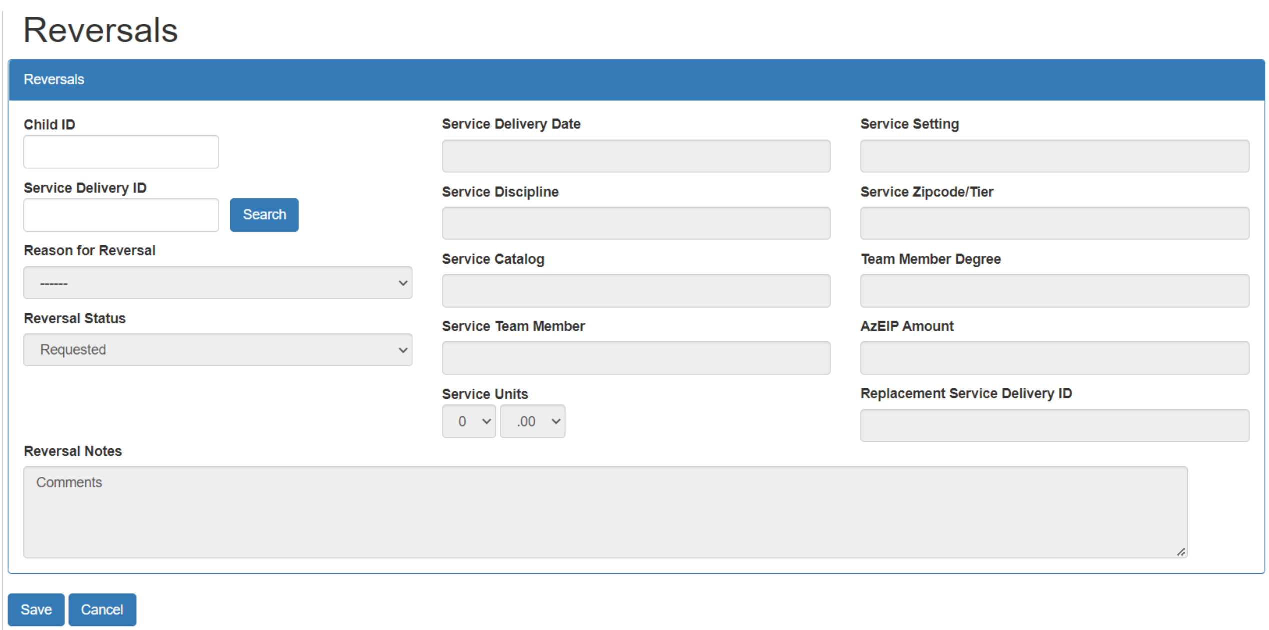
REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

25.0 Reversals

Users can request Reversals in I-TEAMS for reviewed services if there is a change impacting the amount paid by AzEIP for the service provided. Once AzEIP Fiscal approves Reversals, users can submit Invoice.



Steps to request for Reversals

1. Click on Reversals from the Home page.
2. Search for the Reviewed service delivery which needs to be adjusted.
    A. Enter Child ID.
    B. Enter Service Delivery ID.
    C. Click on Search.

3. Select Reason for Reversal.
4. Reversal Status is auto populated.
5. Based on the value selected for Reason for Reversal, additional field(s) may be displayed. Select appropriate values.
6. Service Delivery Date, Service Discipline, Service Catalog, Service Team Member, Service Units, Service Setting, Service Zipcode/Tier, Team Member Degree and AzEIP Amount are auto populated.
7. Replacement Service Delivery ID will be entered by weekly job if the service delivery is auto-created. If replacement service delivery is manually created, notify the AzEIP Fiscal team by email.
8. Click on Save to save Reversal request successfully.

25.1 Reversal Documentation submission

This feature allows users to submit Reserval documents through I-TEAMS.

Steps to submit Reversal documentation

Note: Each field with an asterisk (*) is required.

1. Click on Here from the Reversal page.
2. * Enter Email address
3. * Select Reversal Request Date.
4. * Select Program Name.
5. * Select Region.
6. * Enter Contact Person.
7. * Enter Contact Email.
8. Click on Next.
9. * Enter Child ID.
10. * Enter Reviewed Service Delivery ID.
11. Enter Service Date.

12. * Select Reason for Reversal.
13. Click on Next.
14. Click on Add file and select file to be uploaded.
15. Click on Upload.
16. Click on Next
17. Enter any additional Information that may be needed to process the reversal request.
18. Click on Submit.

25.2 Review and Edit Reversals

Filter By: ---- Apply

Number Of Records to View: 25

	Reversal ID	Reversal Date	Child ID	Service Delivery ID	Service Date	Reason For Reversal	Adjusted SD Data	Reversal Status	Reversal Status Date	Reversal Amount	Replacement Service ID	Reversal Notes
Edit	3277	09/28/2023	189840	1954174	09/06/2022	TPL Decision or Amount Change		Requested	09/28/2023	$170.07		
Reviewed	3265	09/26/2023	180027	1944060	08/09/2022	TPL Decision or Amount Change		Approved	09/27/2023	$170.07	2094595	
Reviewed	3264	09/26/2023	180027	1954310	09/12/2022	TPL Decision or Amount Change		Approved	09/27/2023	$170.07	2094594	

Default view allows users to view up to 25 Reversals entries under their agency. Number Of Records to View allows users to view more and older Reversals entries. User can use Filter By feature to locate the Reversal needed easily.

Each Reversals entry displays details including:

A. Status of Reversals which shows if the Reversal is Invoiced or not. If the Reversal has not been approved, the user will see Edit. If the status is blank, the reversal has been approved but not yet invoiced. If Invoice is saved as Draft, then status will be Pending. If Invoice has been submitted successfully, service Delivery status will be Reviewed.

B. Reversal ID is the unique ID associated with each Reversal.

C. Reversal Date is the date when Reversal was requested.

D. Child ID

E. Service Delivery ID

F. Reason for Reversal

G. Adjusted SD data

H. Reversal status

I. Reversal status Date

J. Reversal Amount

K. Replacement Service Delivery ID is the service delivery ID of the new service delivery created to replace the reversed service delivery when applicable to do so.

L. Reversal Notes

Steps to Edit Reversals entry

Note: Reversals entries can be edited only if the service is not invoiced and Reversal status is Requested.

1. Click on Edit.
2. Make necessary changes in Reversals entry.
3. Click on Apply Edit to save changes successfully.
4. Click on Cancel to cancel changes.

CHAPTER 26: BANNERS

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

26.0 Banners

Banners are alert text messages that are displayed in Home Page. Banner messages can be displayed for all AzEIP regions or specific AzEIP regions.

26.1 Add New Contractor Banner

The Add New Contractor Banner page allows Contract Admin to create banners for all or specific contract regions seen by any I-TEAMS user within that contract and region(s) selected. Banner messages will be displayed on I-TEAMS Home Page during specified dates.

Steps to Add New Contractor Banner

1. Click on Add New Contractor Banner located on the left navigation pane.

2. Enter a banner message in the Message box. Up to 2040 alphanumeric characters can be entered in the banner message.
3. Select Start Date. This is the date when banner is created by the user. This will be displayed as Posted Date in Home Page along with the banner message. The Start Date should not be before the date the banner is created.
4. Select Effective Date. Banner message will start displaying on Home Page from Effective date.
5. Select End Date. This defines when the message will stop displaying on the Home Page.
6. Select Regions using the selection box if the banner message is intended for specific regions or Click on Select All if the message is for all assigned regions.
7. Click on Add to save Banner successfully.
8. Click on Cancel to cancel.
9. Once the banner is successfully saved, the following confirmation message will be displayed “Your Banner has successfully Posted”.

26.2 Manage Contractor Banner

A Contract Admin can make changes in banner messages as well as change timeframe to display the banner message.


Manage Contractor Banners

Start Date: (mm/dd/yyyy) 05/17/2018 End Date: (mm/dd/yyyy) 05/18/2018 Search

Select	Message	Start Date	Effective Date	End Date	Modified By	Modified Date
Select	Test contract banner message!	05/17/2018	05/18/2018	05/18/2018	Mary Sebastian	05/10/2018

Add New Contractor Banner

Steps to Manage AzEIP Banner

1. Click on Manage Contractor Banners located on the left navigation pane.
2. Enter Start Date and End Date to search for banners within these dates.
3. Click on Search.
4. Click on Select.
5. Click on Edit to edit the banner message or the timeframe.
6. Click on Update to successfully save the changes made.

CHAPTER 27: ORGANIZATIONS

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

27.0 Organizations

An Organization is a contracted early intervention organization who provides early intervention services in their assigned regions. An Organization can have more than one contract for more than one region.

27.1 Manage Organizations

A Contract Admin user will have read only access to their organization in I- TEAMS. Only a user assigned to an AzEIP Admin role will have permissions to add a new organization or make changes to Organization.

Steps to Manage Organizations

1. Click on Manage Organizations link from left navigation pane.
2. Click on Select to view organization information in detail.

Note: Please contact AzEIPITEAMS@azdes.gov to edit Organization information.

CHAPTER 28: CONTRACTS

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

28.0 Contracts

Contracts section allows for users to view and manage contract information for early intervention providers, including assigned geographic service area (GSR) regions. Contractors may have contracts in multiple regions or single contract for a GSR region.

28.1 Manage Contracts

A Contract Admin will have read only access to their contract details in I-TEAMS. An ADES/AzEIP Admin has permissions to add new contracts and make changes to the Contracts page.

Steps to Manage contracts

1. Click on Manage Contract link from left navigation pane.
2. Click on Select to view Contract information in detail.

Note: Please contact AzEIPITEAMS@azdes.gov to edit Contract information.

CHAPTER 29: EMPLOYEES

REVISION DATE: December 2023

EFFECTIVE DATE: December 2023

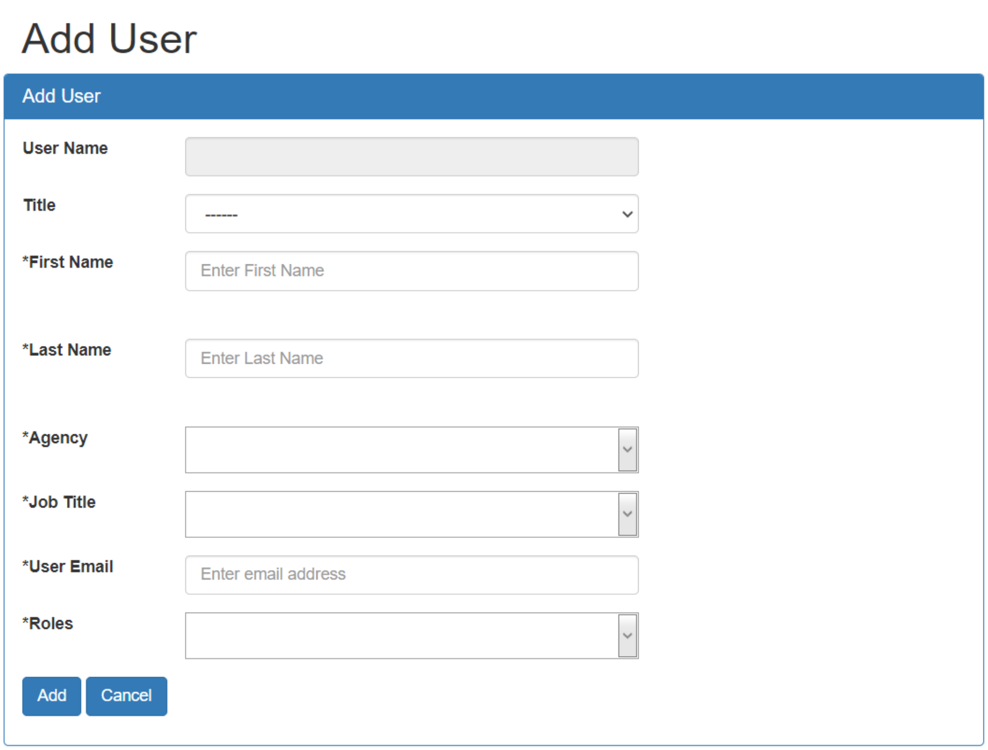
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

29.0 Employees

The Employees section allows users to manage I-TEAMS users. I-TEAMS uses different functionalities to manage Non-DES users and DES users. Non-DES users are required to register to I-TEAMS to be able to successfully login. DES users are not required to register in I-TEAMS.

29.1 Add User

Admin users have permissions to add new users under their organization to I-TEAMS, assign their roles and contracts to the employee.



Steps to Add User

Note: Each field with an asterisk (*) is required.

1. Click on Add User link from left navigation pane.
2. Select Title.
3. * Enter First Name.
4. * Enter Last Name.
5. * Select Agency.
6. * Select JobTitle.
7. * Enter User Email.
8. * Select Roles.
9. Select Contract Name.
10. Select Start Date.
11. Click on Add to save the Contract name.
12. Click on Add to add a new user to I-TEAMS.
13. The user will get the message “Employee has been added successfully. Registration Code sent successfully to the registered email.”

Note: User must select Professional Discipline under Professional Provider tab for the new user to be able to be assigned to the child records.

Roles and their definitions:

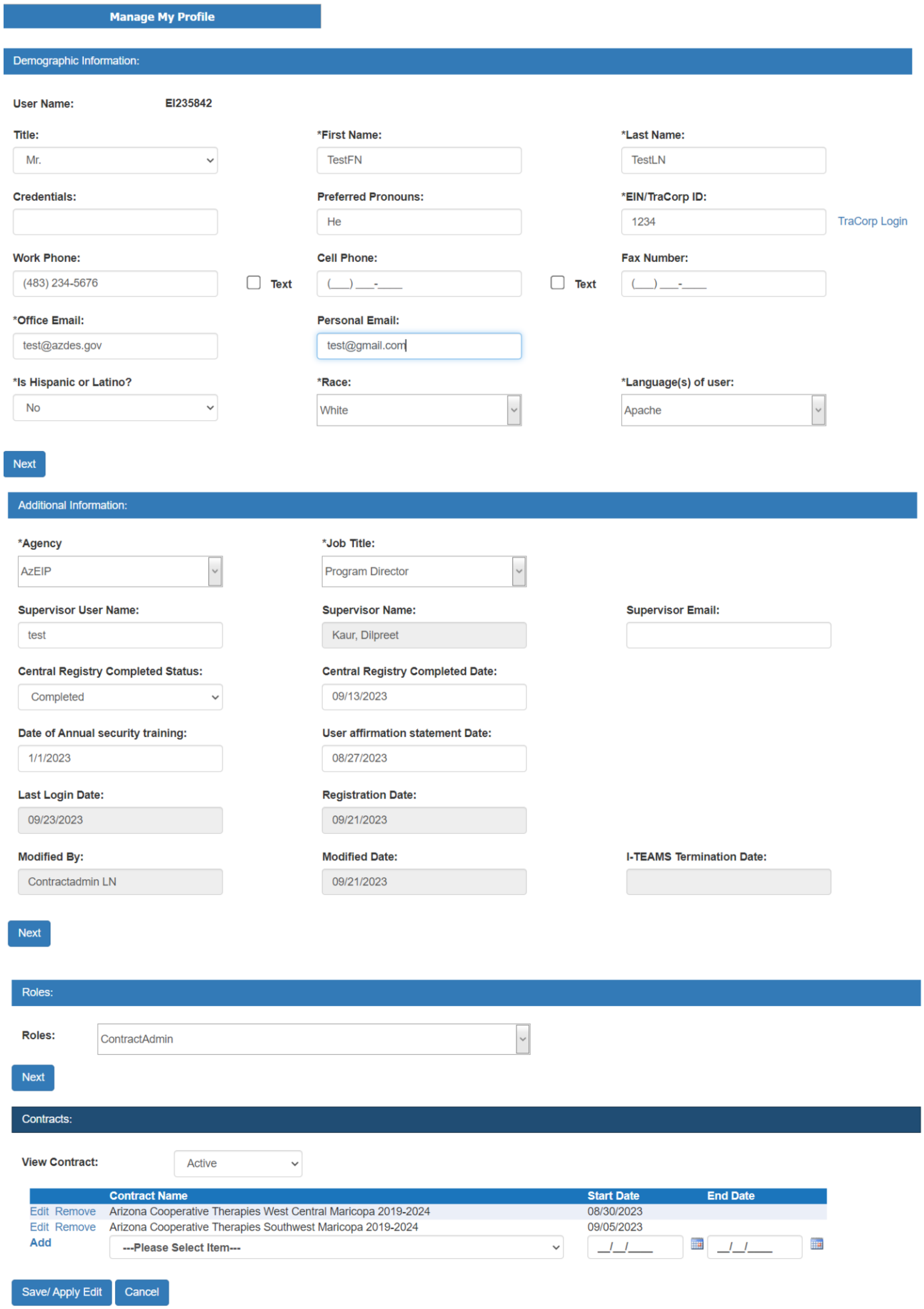
Role	Definition
Contract Admin	Non-DES role for Program director/manager of an Organization will have permissions for all child records and all employees under that organization.
Data Entry Expanded	Non-DES users under a specific contract will have access to all child records under their contract.

ReadOnly	Non - DES role with permissions to view current and historical data and reports in I-TEAMS but not enter or change data. Ideally used for staff that audit or monitor but do not have an active role in entering data.
Service Coordinator	Non-DES user under specific contracts will only have access to records assigned to them.
Finance	Non-DES user with permission to invoice service deliveries tied to their contracts.
Prof Provider	Non- DES roles for Professional Providers are direct service providers under specific contracts that will only have access to records assigned to them.
Supervisor	Both DES and Non-DES role under specific contracts will have access to all child records and employees under their contract.
HumanResource	Non - DES user who can manage employees associated with his contracts.
DDDAdmin	DES role for Program director/manager of an Organization will have permissions for all child records and all employees under that organization.
Data Entry Expanded	Non - DES User under specific contract will have access to all child records under their contract.
DESReadOnly	DES Standalone role with permissions to view current and historical data and reports in I-TEAMS but not enter or change data. Ideally used for staff that audit or monitor but do not have an active role in entering data.
DDDService Coordinator	DES Service Coordinators under specific contracts will only have access to records assigned to them.

DDDSecurity	DES user assigned with a limited role to create, terminate, and/or modify access for DES personnel accounts from I- TEAMS. Assistance with reactivating an account must go to the AzEIP Help Desk for support.
ASDB Admin	ASDB Admin will have permissions to all ASDB eligible child records and all ASDB employees under their contract.
ASDB Finance	ASDB Finance will have permission to invoice service deliveries associated with his contracts. (Not a feature in system)
ICC	Non-DES user from the Interagency Coordinating Council for Infants and Toddlers (ICC) that will have access to a ICC Member profiles and documents.
ADE Part B	Non-DES user from the Arizona Department of Education (ADE) that will have access to all Child Records with AzEDS ID in order to audit and evaluate transition processes and activities.
DCS	Non-DES from the Arizona Department of Child Safety (DCS) user that will have access to all Child Records associated with an open DCS case.
CentralReferralAdmin	Non-DES user role for Manager of the Central Referral organization who will have permissions for all child records and all employees under that referral organization.
CentralReferral	Non-DES user of the Central Referral organization who will have permissions for all existing child records and permission to process all new referrals.

29.2 Manage My Profile

Each I-TEAMS user can manage their Profile under the Manage My Profile section. Most of the details were already added when the user was created in I-TEAMS.



Manage My Profile

Demographic Information:

User Name: EI235842

Title: Mr.	*First Name: TestFN	*Last Name: TestLN
Credentials:	Preferred Pronouns: He	*EIN/TraCorp ID: 1234 TraCorp Login
Work Phone: (483) 234-5676 Text	Cell Phone: (___) ___-____ Text	Fax Number: (___) ___-____
*Office Email: test@azdes.gov	Personal Email: test@gmail.com	
*Is Hispanic or Latino? No	*Race: White	*Language(s) of user: Apache

Next

Additional Information:

*Agency AzEIP	*Job Title: Program Director	
Supervisor User Name: test	Supervisor Name: Kaur, Dilpreet	Supervisor Email:
Central Registry Completed Status: Completed	Central Registry Completed Date: 09/13/2023	
Date of Annual security training: 1/1/2023	User affirmation statement Date: 08/27/2023	
Last Login Date: 09/23/2023	Registration Date: 09/21/2023	
Modified By: Contractadmin LN	Modified Date: 09/21/2023	I-TEAMS Termination Date:

Next

Roles:

Roles: ContractAdmin

Next

Contracts:

View Contract: Active

	Contract Name	Start Date	End Date
Edit Remove	Arizona Cooperative Therapies West Central Maricopa 2019-2024	08/30/2023	
Edit Remove	Arizona Cooperative Therapies Southwest Maricopa 2019-2024	09/05/2023	
Add	---Please Select Item---	__/__/____	__/__/____

Save/ Apply Edit Cancel

Steps to Manage My Profile

Note: Each field with an asterisk (*) is required.

1. Click on Manage My Profile link from the left navigation pane.
2. Complete Demographic Information section.
   A. User Name is auto populated and cannot be changed.
   B. Select Title.
   C. *Enter First Name.
   D. *Enter Last Name.
   E. Enter Credentials.
   F. Enter Preferred Pronouns.
   G. *Enter EIN/TraCorp ID.
   H. Enter Work Phone.
   I. Select Text if the user wishes to receive Text messages.
   J. Enter Cell Phone.
   K. Select Text if the user wishes to receive Text messages.
   L. Enter Fax Number.
   M. *Enter Office Email.
   N. Enter Personal Email.
   O. *Select Is Hispanic or Latino?
   P. *Select Race.
   Q. *Select Language(s) of user.
3. Click on Next to go to the Additional Information section.
   A. *Select Agency.
   B. *Select Job Title.
   C. Enter Supervisor User Name and then hit Tab or Enter Key.
   D. Supervisor Name and Supervisor Email is auto populated when a valid Supervisor User Name is entered.
   E. Select Central Registry Completed Status.
   F. Select Central Registry Completed Date.
   G. Select Date of Annual security training.

H. Select User affirmation statement Date.
I. Last Login Date is auto populated.
J. Registration Date is auto populated.
K. Modified By is auto populated.
L. Modified Date is auto populated.

4. Click on Next to go to the Roles section.
   A. Select Roles.
5. Click on Next to go to the Contracts section.
   A. Select View Contract option.
6. Click on Save/Apply Edit to save changes.

Steps to manage Professional Provider

Note: This section will be visible only for Professional Providers. Admin users can manage Professional provider details from Manage Active Users.

1. Click on Manage My Profile link on the left navigation pane.
2. Click on Professional Provider.
3. Complete Professional Provider Information section.
   A. First Name is auto populated.
   B. Last Name is auto populated.
   C. Professional Discipline is auto populated.
   D. Dual Role is checked when the user is dual role.
   E. Enter Professional License Number.
   F. Enter Professional License Expiry Date.
   G. Enter Provider AHCCCS ID.
   H. Enter Certification Number.
   I. National Provider Identification Number.
   J. Select Type of Degree.
   K. Enter Advanced Degree Conferred Date.
   L. Select Field of Study.

M. Enter Field of Study Other.
N. Select AzEIP Standards Of Practice Status.
O. Enter AzEIP Standards Of Practice Completion Date.
P. Education Plan Status is entered by the admin user. This is visible only for DSI and SC.
Q. Education Plan End Date is entered by the admin user. This is visible only for DSI and SC.
R. Enter Fingerprint Expiration Date.
S. Select OAE Screener Training Date.
T. Select OAE Screener Training Type.
U. Click on Apply Edit.
V. User will get the message “Professional Provider Information updated successfully!”

29.3 Manage Active Users

Admin users can view/modify employee information under their organization. This section also allows users to change/assign new roles, assign employees to new contracts, unlock employee accounts, resend registration code if an employee cant locate the registration code sent by email and terminate an employee.

Steps to Manage Active Users

1. Click on Manage Active Users link on the left navigation pane.
2. Enter First Name, Last Name, User Name and/or Agency.
3. Click on Search.
4. Click on Username to open and manage Employee Information.

Note: Manage User Profile is the same as Manage My Profile section. Please refer to 29.2 for detailed information.

5. Click on Save/Apply Edit to update information.

Steps to Unlock Account

1. Click on Manage Active Users link on the left navigation pane.
2. Enter First Name, Last Name, User Name and/or Agency.
3. Click on Search.
4. Click on Username to open User Profile.
5. Click on the Unlock Account under Demographic Information. This button will be visible only if the user is locked out.
6. User will get an “Account unlocked successfully” message.

Steps to Terminate an employee

1. Click on Manage Active Users link on the left navigation pane.
2. Enter First Name, Last Name, User Name and/or Agency.
3. Click on Search.
4. Click on Username to open User Profile.
5. Click on Additional Information.
6. Enter I-TEAMS Termination Date.
7. Click on Save/Apply Edit.

Steps to manage Professional Provider

1. Click on Manage Active Users link on the left navigation pane.
2. Enter First Name, Last Name, User Name and/or Agency.
3. Click on Search.
4. Click on Username to open User Profile.
5. Click on Professional Provider.

Note: Please refer to section 29.2 for steps to manage Professional Provider.

29.4 Manage Terminated Users

A Contract Admin can activate an employee's account when they join back to the agency after some time.

Steps to Manage Terminated User Accounts

1. Click on Manage Terminated Users link on the left navigation pane.
2. Enter First Name, Last Name, User Name and/or Agency.
3. Click on Search.
4. Click on User Name.
5. Click on Additional Information.
6. Remove I-TEAMS Termination Date.
7. Click on Save/Apply Edit.
8. Users will get "Termination Date updated successfully!" message.

Note: Now the employee's profile will be moved to the Manage Active Users section.

29.5 Automated emails

New user Registration

Subject: [secure][AzEIP I-TEAMS]: New User Registration Code

Hello XXXX,

You have been successfully added to AzEIP ITEAMS Application.
Your username is XXXXXXX. Please use registration code <code> while registering in ITEAMS application.
Here is the link to AzEIP ITEAMS Application
https://azeip.azdes.gov/AzEIP/AzEIP_ITEAMS

Below are the steps to successfully Register into ITEAMS Application:

1. Click on the link https://azeip.azdes.gov/AzEIP/AzEIP_ITEAMS

2. Click on Agree from the User Agreement

3. Click on the Register Here link displayed below the Login button

4. Complete the Register New Account form and then click on Register

Thank You,
AzEIP ITEAMS Team

One-Time Passcode

Subject: [secure][AzEIP I-TEAMS]: Your One-Time Passcode

Hello XXXX,

Here is your one-time passcode to reset security questions and answers for I-TEAMS application

<OTP Code>

One – time passcode invalid or expired? Click here to generate another one-time passcode.

Thank You,
AzEIP ITEAMS Team

User account Termination Reminder

Subject: Your I-TEAMS Account will be Terminated Soon
Dear USER First Name,

This is an automated reminder to login to your I-TEAMS account. AzEIP records indicate that you have not logged into I-TEAMS for more than 60 days. The system will suspend

your I-TEAMS account on XX/XX/XXXX. If you would like to continue using the system, please login into **I-TEAMS here** to avoid account being suspended.
Username: <User Name>

If you are an occasional user of I-TEAMS, it is recommended you set a task or calendar reminder for yourself to login at least once every 90 days to avoid any suspension.

Thank You,
AzEIP Helpdesk

User account Suspended

Subject : [Secure]Your I-TEAMS Account Has Been Suspended

Dear XXXX,

If you are receiving this email, then you have not logged in into I-TEAM for 90 days and your account has been suspended. If you need to use I-TEAMS in the future, please contact your supervisor to unlock your I-TEAMS account or click here to unlock your account on your own.

Username: XXXX

Thank You,
AzEIP Helpdesk

User account Terminated

Subject: [Secure]Your I-TEAMS Account is Terminated

Dear XXXX,

If you are receiving this email, then your account has been terminated in I-TEAMS.
If you need to use I-TEAMS in the future, please contact your supervisor to reactivate your I-TEAMS account.

Username: XXXXX

Thank You,
AzEIP Helpdesk

Password Expiration Reminder Email

Subject: [Secure]Your I-TEAMS Password will Expire Soon
Dear XXXX,

This is an automated reminder to reset to your I-TEAMS password. AzEIP records indicate that you have not reset your password for more than 60 days. Your I-TEAMS password expired on XX/XX/XXXX. If you would like to reset your password, please click here.

Username: XXXXX

If you are an occasional user of I-TEAMS, it is recommended you set a task or calendar reminder for yourself to reset your password at least once every 90 days to avoid account Suspension.

Thank You,
AzEIP Helpdesk

Password Expiration Email

Subject: [Secure]Your I-TEAMS Password Has Expired

Dear XXXX,

If you are receiving this email, then your I-TEAMS password has been expired. If you would like to reset your I-TEAMS password, please **click here.**

Username: XXXXX

Thank You,

AzEIP I-TEAMS

APPENDIX

The last I-TEAMS release was on 11/30/2023. This version of I-TEAMS manual includes most current features in I-TEAMS as of that date, corresponding with I-TEAMS Release 8.7. For support on features or releases after that date which are not included in this manual, please contact the AzEIP Help Desk.

Help Desk Contact

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AzEIP Data Manager

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AzEIP Office

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