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CHAPTER 1: I-TEAMS OVERVIEW

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022

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.

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 record.
3. Child Demographics information.
4. Contract and Team member assignment.
5. Insurance Consent.
6. Eligibility information.
7. Screening Information.
8. IFSP information.
10. Transition.
11. Transfer child record to new region.
13. Compliance decisions.
15. Invoice/Billing/Payments.
16. TPL information.

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 Windows 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
ITEAMS 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 button.

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 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 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. 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

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
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<tbody>
<tr>
<td>ACP</td>
<td>Address Confidentiality Program</td>
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<tr>
<td>ADHS</td>
<td>Arizona Department of Health Services</td>
</tr>
<tr>
<td>ADE</td>
<td>Arizona Department of Education</td>
</tr>
<tr>
<td>AHCCCS</td>
<td>Arizona Health Care Cost Containment System</td>
</tr>
<tr>
<td>AKA</td>
<td>Also known as</td>
</tr>
<tr>
<td>ALTCS</td>
<td>Arizona Long Term Care System</td>
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<tr>
<td>ASDB</td>
<td>Arizona State Schools for the Deaf and the Blind</td>
</tr>
<tr>
<td>AzEIP</td>
<td>Arizona Early Intervention Program</td>
</tr>
<tr>
<td>EIP</td>
<td>Early Intervention Program</td>
</tr>
<tr>
<td>DES</td>
<td>Department of Economic Security</td>
</tr>
<tr>
<td>CPS</td>
<td>Child Protective Services (aka DCS)</td>
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<tr>
<td>DCS</td>
<td>Department of Child Safety</td>
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<tr>
<td>DDD</td>
<td>Division of Developmental Disabilities</td>
</tr>
<tr>
<td>DSI</td>
<td>Developmental Special Instructionist</td>
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<tr>
<td>HRA</td>
<td>Health Reimbursement Account</td>
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<tr>
<td>HSA</td>
<td>Health Savings Account</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
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<tr>
<td>IFSP</td>
<td>Individualized Family Service Plan</td>
</tr>
<tr>
<td>ISP</td>
<td>Individualized Service Plan</td>
</tr>
<tr>
<td>I-TEAMS</td>
<td>Infant Toddler Electronic Administration and Monitoring System</td>
</tr>
<tr>
<td>LTC</td>
<td>Long Term Care</td>
</tr>
<tr>
<td>OT</td>
<td>Occupational Therapist</td>
</tr>
<tr>
<td>PEA</td>
<td>Public Education Agency</td>
</tr>
<tr>
<td>PT</td>
<td>Physical Therapist</td>
</tr>
<tr>
<td>PWN</td>
<td>Prior Written Notice</td>
</tr>
<tr>
<td>RSK</td>
<td>Raising Special Kids</td>
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<tr>
<td>SC</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>SLP</td>
<td>Speech Language Pathologist</td>
</tr>
<tr>
<td>TPL</td>
<td>Third Party Liability</td>
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<tr>
<td>TSC</td>
<td>Targeted Support Coordination</td>
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CHAPTER 2: GETTING STARTED

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
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

All Non-DES I-TEAMS users-AzEIP contractors, ASDB, and Central Referral Staff [Raising Special Kids (RSK)] 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 user name and registration code upon the creation of a user profile in I-TEAMS by the administrator.
New User steps to register in I-TEAMS

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

1. Click on Agree from User Agreement page.
2. Click on Register located on top left side of I-TEAMS login page.
3. *Enter User Name.
5. *Enter Password.
7. *Enter employee E-mail.

Note: Remember your security answers to manage and change your password in the future.

10. Click on Create User to complete registration.
11. Click on Log In to go to I-TEAMS login page.
12. Enter your Username, Password, and click on Log In to login to I-TEAMS.

Rules for creating I-TEAMS password:

1. Must be at least 8 characters long.
2. Must consist of only letters and numbers. No special characters.
3. Must have at least one UPPERCASE LETTER, lowercase letter, and number.

2.2 Log In

Non-DES employees can login to I-TEAMS once 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_TEAMS/Account/Login.aspx](https://azeip.azdes.gov/AzEIP/AzEIP_TEAMS/Account/Login.aspx)
2. Click on Agree from User Agreement page.
3. Enter Username.
4. Enter password.
5. Click on Log In.

2.3 Using the System

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 ITEAMS 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 button
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 links are located at the middle of the Home Page.

2.4 Manage Password

Manage Password functionality in I-TEAMS is for all Non-DES I-TEAMS users to reset their password. A user can reset their password when their account is locked out or when user forgets their password. If a user attempts to login with an invalid username or password more than three times, their user account will be locked.

ADES employees will contact their Technical Support team to manage or change password. ADES employees will use their Active directory credentials (D# and password) to login into I-TEAMS application.
Steps to manage password

1. Click on Agree from I-TEAMS User Agreement page.
2. Click on Manage Password from Login page.
3. Enter your username.
4. Click on Submit.
5. Answer security questions selected at the time of registration. Security Answers are case sensitive.
6. Click on Reset Password.
7. Re-enter security answers.
8. System will generate a temporary password. Copy the temporary password and click on Change Password.
9. Enter User Name.
10. Enter the temporary password as Old Password.
11. Enter New Password. Please refer to Section 2.1 for the I-TEAMS password rules.
13. Click on Change Password.

14. The user will see the following message when password is changed successfully
   “Change Password Success. Your password has been changed successfully”.

15. Click on Log In to proceed to login to I-TEAMS.

2.5 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: July 2022
EFFECTIVE DATE: July 2022
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

Search for Referral Match page allows user 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.

Steps to Search for Referral Match

Note: This page allows users to search with partial values (for example first few letters of 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 fields to search for an existing child record. User can enter any...
three values to successfully get search results.

3. Click on Search to view a list of potential matching child records.

4. Click on Open / Pending / Transfer/ Exited to view the record in detail.

5. Click on Service Coordinator to view name and phone number of assigned Service Coordinator of the child.

6. Click on Available Address to view 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 values field.

8. Click on Search to view a list of potential matching child records.

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.

Users can also use Locate Child feature in I-TEAMS to search for a child record already existing in I-TEAMS. It gives a list of all matching records in I-TEAMS with given search values. Results display Child ID, Referral Date, Child Name, DOB, Gender and Record Status. User can Click on Select to view additional details about the record.

3.2 Add New Referral

Add New Referral page allows user to enter a new referral to I-TEAMS which will create a new I-TEAMS record for the child. AzEIP Central Referral 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. When Referral Reason Type is selected, Referral Reason list will change accordingly.

13. Select Referral Reason. When Referral Reason Type is selected as Other reason for referral, then enter Referral Reason.


15. Select Referral Status.

16. Enter Referrer First Name.

17. Enter Referrer Last Name.

18. Enter Referrer's Company. Please use same Naming convention for referrer companies.

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 the Cancel button to erase all the information entered without saving it.

22. Click on the Add Referral button.

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 button. Click on Add New Referral button 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 user will see 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 user to access referral page of a child record to modify basic referral information and add/remove/edit referral source address. User 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 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
REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

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.

<table>
<thead>
<tr>
<th>Alert Message</th>
<th>When Alert is Issued</th>
<th>User receiving Alert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional license expires for professional provider</td>
<td>Before License Expiration Date</td>
<td>Professional Provider</td>
</tr>
<tr>
<td>Evaluation not conducted 30 calendar days after referral</td>
<td>If Eligibility Decision Date is not entered after 30 calendar days after referral days</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Evaluation not conducted 40 calendar days after referral</td>
<td>If Eligibility Decision Date is not entered after 40 calendar days after referral days</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Assign Service Coordinator to child</td>
<td>More than two days past initial referral date</td>
<td>Referral intake users</td>
</tr>
<tr>
<td>Service coordinator must meet with family</td>
<td>Within seven days from the initial referral date</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Exit Date not entered</td>
<td>At child’s third birthday</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Children assigned to Service Coordinator</td>
<td>When child record is assigned to the Service Coordinator</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>New IFSP created Annually</td>
<td>1 month before annual IFSP is due</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Event Description</td>
<td>Condition/Timeframe</td>
<td>Response/Role</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>--------------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Initial IFSP not entered 30 calendar days after referral</td>
<td>If Date of IFSP is not entered after 30 calendar days after referral</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Initial IFSP not entered 40 calendar days after referral</td>
<td>If Date of IFSP is not entered after 40 calendar days after referral</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>IFSP Transition Planning meeting due</td>
<td>If IFSP date is entered and the DOB is between 1 year 11 months to 2 year 10 months and 15 days</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Transfer notification - transferred to user</td>
<td>When record is transferred</td>
<td>Contract Administrator of new Program</td>
</tr>
<tr>
<td>Transfer notification - transferred from user</td>
<td>When record is acknowledged</td>
<td>Contract Administrator of sending Program</td>
</tr>
<tr>
<td>Date consent to use insurance provided</td>
<td>One month before one year after date of consent</td>
<td>Service Coordinator &amp; Contract Administrator</td>
</tr>
<tr>
<td>A new child is assigned to your contract region</td>
<td>When a new referral is assigned to the contract</td>
<td>Contract Administrator</td>
</tr>
<tr>
<td>Entry Child Indicator Summary due</td>
<td>Child Indicator Summary Date of Entry Rating not entered if initial IFSP date is entered</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Exit Child Indicator Summary due</td>
<td>At 2 years and 9 months (2.9)</td>
<td>Service Coordinator</td>
</tr>
<tr>
<td>Your Invoice for the month of [0] has been Reviewed.</td>
<td>When Invoice is reviewed</td>
<td>Contract Administrator &amp; Finance</td>
</tr>
<tr>
<td>Units exceeding IFSP Units have been entered, which are Non-Billable</td>
<td>When excess IFSP units have been entered</td>
<td>Contract Admin &amp; Finance</td>
</tr>
</tbody>
</table>

**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 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 Home Page or from the left navigation pane.

2. Click on Last Name, First Name, Date of Birth, Gender, Status or Status Date to see list of children in sorted order.

3. Click on Select to open 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

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

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.

Hello TestFN TestLN.
Welcome to the AzEIP ITEAMS Application!

  My Alerts
  My Children
  I-TEAMS User Manuals
  My Reports
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 Home Page.
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 only one calendar month.

Steps to run Service Delivery Report

1. Click on My Reports from Home Page.
3. Select Service Start Date.
4. Select Service End Date.
5. Select Service Type.
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 Home Page.
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 Home Page.
2. Select IFSP Services Utilization Report.
3. Select IFSP Start Date.
4. Select IFSP End Date.
5. Select IFSP Service Type.
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 Home Page.
2. Select Active Case Count Report.
3. Select Start Date.
4. Select End Date.
5. Select Report Type.
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 Home Page.
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 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.
CHAPTER 6: CHILD DEMOGRAPHICS

REVISION DATE: July 2022
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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 45th day from the Referral Date. If eligibility has not been determined and Initial IFSP has not been created before the 45th day timeline, this date will be highlighted in ORANGE.
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 (AKA- also known as).
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.
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, 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 button 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 correct address from the Address Verification pop-up window.
   D. Click on Save Chosen Address to save 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 correct address from the Address Verification pop-up window.
   D. Click on Save Chosen Address to save 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 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 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 button 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.
10. Transfer Child.
11. Transition Child.
12. Exit Child Record.
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: July 2022
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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.

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 Eligibility page has DDD Eligibility Decision as Yes.

   B. User should add ASDB as an Agency when Eligibility page has ASDB Eligibility Decision as Yes.
2. 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.

3. 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.

<table>
<thead>
<tr>
<th>Eligibility</th>
<th>Is Primary</th>
</tr>
</thead>
<tbody>
<tr>
<td>AzEIP</td>
<td>AzEIP</td>
</tr>
<tr>
<td>AzEIP, DDD</td>
<td>DDD</td>
</tr>
<tr>
<td>AzEIP, ASDB</td>
<td>ASDB</td>
</tr>
<tr>
<td>AzEIP, ASDB, DDD</td>
<td>DDD</td>
</tr>
</tbody>
</table>

4. 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.

       a. RSK users can enter ASDB at time of referral before eligibility is entered when a referral indicates a potential need for ASDB services

       b. Depending on their role, Team Based Early Intervention Service Contractors may be able to enter ASDB eligibility and assign ASDB as a contract on the Assign/Change Team Members Page.

       c. DDD Service Coordinators are not able to assign ASDB as a contract on the Assign/Change Team Members Page but DDD Supervisors can.

5. 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 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.

Note: DO NOT manually save Assignment End Date for AzEIP during record transfers or exits.

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.

   Note: Please contact Helpdesk if AzEIP agency was end dated by mistake while assigning DDD as Primary.

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: July 2022
EFFECTIVE DATE: July 2022
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: July 2022
EFFECTIVE DATE: July 2022
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 Insurance Consent link from Additional Data section at 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)

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

*Note: Please contact I-TEAMS Help Desk to make any changes to active Insurance.*

#### 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.

   
   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. User will not be able to make any changes to Insurance once it is saved. 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.

<table>
<thead>
<tr>
<th>Primary</th>
<th>Primary (Secondary)</th>
<th>Secondary (Tertiary)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>HSA</td>
<td>Public</td>
</tr>
<tr>
<td>Private</td>
<td>HRA</td>
<td>Public</td>
</tr>
<tr>
<td>Private</td>
<td>Private</td>
<td>Public</td>
</tr>
<tr>
<td>Private</td>
<td>Military</td>
<td>Public</td>
</tr>
<tr>
<td>Private</td>
<td>Public</td>
<td>Public</td>
</tr>
</tbody>
</table>

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: July 2022
EFFECTIVE DATE: July 2022

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. User should create new waiver for different services and different insurances.

Waivers will be automatically ended:

1. When 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 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 user to submit Waiver documents through I-TEAMS.

Please submit Waiver documentation [here](#)

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: July 2022
EFFECTIVE DATE: July 2022
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, Redetermination of Eligibility, etc. Eligibility page also displays DDD eligibility and ASDB eligibility information.

Eligibility details can only be entered in the child record if Insurance information is entered in Insurance Consent page.

11.1 AzEIP Eligibility

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screening Conducted?</td>
<td><em>Required</em></td>
</tr>
<tr>
<td>Date of Consent/PWN Screening</td>
<td></td>
</tr>
<tr>
<td>Select Screening Results</td>
<td><em>Required</em></td>
</tr>
<tr>
<td>Screening Date</td>
<td></td>
</tr>
<tr>
<td>Date of Consent for Evaluation/PWN Signed</td>
<td></td>
</tr>
<tr>
<td>AzEIP Eligibility Decision</td>
<td><em>Required</em></td>
</tr>
<tr>
<td>AzEIP Eligibility Decision Date</td>
<td></td>
</tr>
<tr>
<td>45 Day Delay Reason</td>
<td><em>Required</em></td>
</tr>
<tr>
<td>Delay Reason Other</td>
<td></td>
</tr>
<tr>
<td>Date of PWN for Eligibility Provided</td>
<td></td>
</tr>
</tbody>
</table>

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

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.

*Note: Please contact I-TEAMS Help Desk if incorrect DDD Eligibility details are displayed in I-TEAMS.*

**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

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

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 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).

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

CHAPTER 12: IFSP INFORMATION

CHAPTER 12: IFSP INFORMATION

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
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 user 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 Insurance Consent page.
2. Child is AzEIP eligible and eligibility information has been entered in Eligibility page.
3. Team Lead has been assigned in Assign/Change Team Members page.

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 button. 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 IFSP Information link from Additional Data section at 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 Planned 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 IFSP Services**

*Note: Services should be edited only if an error was made on the service entry or to add any missing information.*

1. Click on Edit on the service.

2. Make necessary changes in Service Delivery entry.

3. Click on Apply to save changes successfully.

4. Click on Cancel to cancel changes.
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 Additional Data section at 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.
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

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: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

14.0 Service Delivery

User can enter all services delivered to or on behalf of a child and family in Service Delivery page. Service Delivery page also allows user 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.


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. **Select Service Team Member.** If Service Team Member is selected as Non-Team Member then enter Non-Team Member Full Name.

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.

<table>
<thead>
<tr>
<th>TPL Service</th>
<th>Active/Historical Insurance</th>
<th>Active/Historical Waiver</th>
<th>TPL Reimbursable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>--</td>
<td>No</td>
</tr>
<tr>
<td>No</td>
<td>N/A</td>
<td>N/A</td>
<td>No</td>
</tr>
</tbody>
</table>

*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 zipcode if applicable.

8. Click on Save to successfully save Team Conferencing.

9. Click on Back to Service Delivery to go back to Service Delivery page.

### 14.2 Review and Edit Service Delivery entry

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:

<table>
<thead>
<tr>
<th>Service ID</th>
<th>Date</th>
<th>Discipline</th>
<th>Service Coordination</th>
<th>Provider</th>
<th>IFSP Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>3062144</td>
<td>12/2/2020</td>
<td>Service Coordinator</td>
<td>Service Coordination</td>
<td>Kallie Chavez</td>
<td>Units: 0.75, Location: 85043, Setting: Other, TPL Service: No, TPL Removable: No</td>
</tr>
<tr>
<td>3037794</td>
<td>12/2/2020</td>
<td>Service Coordinator</td>
<td>Data Entry</td>
<td>Kallie Chavez</td>
<td>Units: 0.25, Location: 85043, Setting: Other, TPL Service: No, TPL Removable: No</td>
</tr>
<tr>
<td>2675305</td>
<td>11/2/2020</td>
<td>Service Coordinator</td>
<td>Service Coordination</td>
<td>Kallie Chavez</td>
<td>Units: 0.25, Location: 85043, Setting: Other, TPL Service: No, TPL Removable: No</td>
</tr>
<tr>
<td>2673285</td>
<td>10/28/2020</td>
<td>Service Coordinator</td>
<td>Service Coordination</td>
<td>Kallie Chavez</td>
<td>Units: 0.25, Location: 85043, Setting: Other, TPL Service: No, TPL Removable: No</td>
</tr>
</tbody>
</table>

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 with Reversals 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 Service Delivery entry is Team Conferencing, user will be redirected to 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 Service Delivery page and for Team Conferencing services from 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.
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: July 2022
EFFECTIVE DATE: July 2022
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 for Transferring Contractor to initiate child record transfer in Transfer Child page

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

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 child record.
4. *Enter Effective Date of Transfer. This date will become Assignment End Date for the transferring Contract and tam 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.
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 proceed to Transfer Child Record.
   B. Click on NO to keep child record open.
11. Click on OK on the confirmation pop-up message.

Steps for newly assigned Contractor to acknowledge the transfer in Search for Referral Match page

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: July 2022  
EFFECTIVE DATE: July 2022  
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.
   
   \textit{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.


20. Select Reason for Late Transition Conference.

21. Click on Save Transition Data to save information successfully.

\textit{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.

\textbf{Steps to Edit and Update Transition Child information}

\textit{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.}

\textit{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: July 2022
EFFECTIVE DATE: July 2022
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 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.


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: July 2022
EFFECTIVE DATE: July 2022
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

Please contact Helpdesk for assistance if data needs to be corrected.
CHAPTER 19: RE-OPEN CHILD RECORD

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
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.

<table>
<thead>
<tr>
<th>Incoming Re-referral in less than 30 days</th>
<th>Child was previously AZEIP Eligible</th>
<th>IFSP Exists in Previous referral</th>
<th>Active IFSP</th>
<th>Re-Open Record?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
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<td>Null</td>
<td>Null</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
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.


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 proceed 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: July 2022
EFFECTIVE DATE: July 2022
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.

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

<table>
<thead>
<tr>
<th>Incoming Re-referral in less than 30 days</th>
<th>Child was previously AZEIP Eligible</th>
<th>IFSP Exists in Previous referral</th>
<th>Active IFSP</th>
<th>Re-Refer Record?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td>N/A</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>Null</td>
<td>N/A</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**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 button to erase all the information entered without saving it.

19. Click on Add Referral button to save.

20. If system 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 button 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: July 2022
EFFECTIVE DATE: July 2022
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

REVOLUTION DATE: July 2022
EFFECTIVE DATE: July 2022
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.

Invoice Summary

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.
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: July 2022
EFFECTIVE DATE: July 2022
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: July 2022
EFFECTIVE DATE: July 2022
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.

   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: July 2022
EFFECTIVE DATE: July 2022
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.
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 Reversal documents through I-TEAMS.

Please Submit Reversal Documentation Here

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.

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

<table>
<thead>
<tr>
<th>Reversal ID</th>
<th>Reversal Date</th>
<th>Child ID</th>
<th>Service Delivery ID</th>
<th>Reason For Reversal</th>
<th>Number Of Records to View</th>
<th>Reversal Status</th>
<th>Reversal Status Date</th>
<th>Reversal Amount</th>
<th>Replacement Service ID</th>
<th>Reversal Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1736</td>
<td>04/04/2022</td>
<td>174921</td>
<td>5941677</td>
<td>Multiple Data Point Correction</td>
<td>25</td>
<td>Approved</td>
<td>04/04/2022</td>
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<td></td>
<td></td>
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<td>1872796</td>
<td>Multiple Data Point Correction</td>
<td>25</td>
<td>Approved</td>
<td>04/04/2022</td>
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<td>188730</td>
<td>3373317</td>
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<td>25</td>
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<td>$20.50</td>
<td>3394562</td>
<td></td>
</tr>
<tr>
<td>1720</td>
<td>03/31/2022</td>
<td>176552</td>
<td>374345</td>
<td>Incorrect Units 0.25</td>
<td>25</td>
<td>Approved</td>
<td>03/31/2022</td>
<td>$22.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1719</td>
<td>03/31/2022</td>
<td>176552</td>
<td>1897906</td>
<td>Incorrect Qualification</td>
<td>25</td>
<td>Approved</td>
<td>03/31/2022</td>
<td>$51.72</td>
<td>1882568</td>
<td></td>
</tr>
<tr>
<td>1316</td>
<td>03/30/2022</td>
<td>189150</td>
<td>3376380</td>
<td>Incorrect Discipline</td>
<td>25</td>
<td>Requested</td>
<td>03/30/2022</td>
<td>$30.68</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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. 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: July 2022
EFFECTIVE DATE: July 2022
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 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.

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: July 2022
EFFECTIVE DATE: July 2022
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 AzEIP-TEAMS@azdes.gov to edit Organization information.
CHAPTER 28: CONTRACTS
REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
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 AzEIP-TEAMS@azdes.gov to edit Contract information.
CHAPTER 29: EMPLOYEES
REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

29.0 Employees

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. Non-DES users are added and managed under the Employees pages on the left navigation pane.

29.1 Add Employee/Assign Roles

A Contract Admin and ASDB Admin have permissions to add new employees under their organization to I-TEAMS, assign their roles and assign contracts to the employee. The Add Employee/Assign Roles page allows Contract Admin and ASDB Admin to add Non-DES Employees to I-TEAMS.

Add Employee

<table>
<thead>
<tr>
<th>Employee Login ID</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Agency</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td></td>
</tr>
<tr>
<td>Central Registry Completed Status</td>
<td></td>
</tr>
<tr>
<td>Date Central Registry Completed</td>
<td></td>
</tr>
<tr>
<td>Employee Identification Number (EIN)</td>
<td></td>
</tr>
<tr>
<td>Employee Email</td>
<td></td>
</tr>
<tr>
<td>Termination Date</td>
<td></td>
</tr>
</tbody>
</table>

Roles

- [ ] Contract Admin
- [ ] DataEntryExpanded
- [ ] Supplier
- [ ] ServiceCoordinator
- [ ] Provider
- [ ] ReadOnly

[Select All Roles] [Clear All Roles]
Steps to Add Employees, Assign Roles and Assign Contracts

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

1. Click on Add Employee/Assign Roles link on the left navigation pane.

2. *Enter Employee Login ID. The Employee Login ID must use the first letter of the new employee’s first name followed by the full last name of the employee.

3. Select Title.

4. *Enter employee’s First Name.

5. *Enter employee’s Last Name.

6. Enter Agency.

7. Enter Job Title.

8. Select Central Registry Completed Status.

9. Enter Date Central Registry Completed.
   
   A. If Central Registry is “Completed”, you must enter the actual date it occurred in the Date Central Registry Completed field.
   
   B. If Central Registry is “Not Completed”, the Date Central Registry Completed field will be grayed out.

10.*Enter Employee Identification Number (EIN). This is also the TraCorp login number which may be a State employee’s numeric EIN or contractor’s DE#### number. The DE is currently unable to be entered as the field only accepts numbers at this time.

11.*Enter Employee Email address.

   Note: An automated email from AzEIPITEAMS@azdes.gov with subject New User Registration Code will be sent to this email address with a Registration Code. If invalid or wrong email address was entered, contact I-TEAMS Help Desk to get Registration Code.

12.*Select employee Roles. User has the optional buttons Select All Roles and Clear All Roles. One employee can be assigned multiple roles.

   Note: Please see table below for more information about each roles.

13. Click on Add to successfully save. Message will be displayed “Employee has been added successfully. Registration Code will be emailed at Employee Email. Select the Contract(s) to be assigned below.”

   A. Select Contract Name. All active contracts under user’s organization will be displayed in drop-down list.

   B. Enter Employee Start Date.

   C. Click on Add to save successfully.

_Note: If user exits out of Add Employee/Assign Roles page before assigning new employee to contracts, contact I-TEAMS Help Desk for support._

**Roles that can be assigned to AzEIP contract users:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Admin</td>
<td>Program director/manager of an Organization will have permissions for all child records and all employees under that organization.</td>
</tr>
<tr>
<td>Data Entry Expanded</td>
<td>User under specific contract will have access to all child records under their contract.</td>
</tr>
<tr>
<td>ReadOnly</td>
<td>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.</td>
</tr>
<tr>
<td>Service Coordinator</td>
<td>Service Coordinators under specific contracts will only have access to records assigned to them.</td>
</tr>
<tr>
<td>Prof Provider</td>
<td>Professional Providers are direct service providers under specific contracts will only have access to records assigned to them.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Supervisors under specific contract will have access to all child records and employees under their contract.</td>
</tr>
</tbody>
</table>

**Roles that can be assigned to ASDB users:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASDB Admin</td>
<td>ASDB Admin will have permissions to all ASDB eligible child records and all ASDB employees under their contract.</td>
</tr>
</tbody>
</table>
### Role Definition

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Entry Expanded</td>
<td>Users under specific contract will have access to all child records under their contract.</td>
</tr>
<tr>
<td>Prof Provider</td>
<td>Professional Providers under specific contracts will only have access to records assigned to them.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Supervisors under specific contract will have access to all child records and employees under their contract.</td>
</tr>
<tr>
<td>ReadOnly</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 29.2 Manage Employee/Roles

A Contract Admin and ASDB Admin have permissions to modify employee information, change/assign new roles and assign employees to new contracts through Manage Employee/Roles page.

#### Steps to Manage Employee/Roles

1. Click on Manage Employee/Roles link on left navigation pane.
2. Enter First Name, Last Name, Member ID and/or Agency.
3. Click on Search.
4. Click on Select to open and manage Employee Information.
5. Click on Edit to update information.
6. Update employee’s information needed and then click on Update to successfully save changes.

### 29.3 Manage Employee Profile

Whenever a new employee is added to I-TEAMS through Add Employee/Assign Roles page, an Employee Profile will be automatically created in Manage Employee Profile page. Contract Admin can add/edit or delete Employee Address, Phone Number, and Email in Manage Employee Profile page. When Employee Name updated in Manage Employee Profile page, it will be automatically updated in Manage Employee/Roles page.
Steps to Manage Employee Profile Information

1. Click on Manage Employee Profile link on left navigation pane.
2. Enter First Name, Last Name, Member ID and/or Agency.
3. Click on Search.
4. Click on Select.
5. Click on Edit to edit Employee Profile.
6. Click on Update to successfully save changes.
7. Click on Cancel to cancel updates or changes.

Steps to Add/Edit/Delete Employee Address

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

1. *Enter the employee’s address on Address Line One and Address Line Two (if applicable). This is a Required Filed.
2. *Enter City using text box. This is a Required Filed.
3. Select State.
5. *Select Address Type.
6. User may select Is ACP if employee is enrolled in Address Confidentiality Program.

7. Click on Add.

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

9. Click on Save Chosen Address.

10. Click on Edit to make changes to employee address and then click on Update to successfully save changes.

11. Click on Delete to remove employee address.

Steps to Add/Edit/Delete Employee Phone Number

1. Enter Phone Number with extension (if applicable).

2. Select Phone Type.

3. Click on Add to successfully save information.

4. Click on Edit to update or make changes to employee Phone Number.

5. Click on Update to successfully save changes.

6. Click on Delete to remove employee Phone Number.

7. Multiple Phone Numbers can be entered.

Steps to Add/Edit/Delete Employee Email Address

1. Enter Email Address.

2. Select Email Type.

3. Click on Add to successfully save information.

4. Click on Edit to make any changes to email address.

5. Click on Update to successfully save changes.

6. Click on Delete to remove employee Email Address.

7. Multiple Email addresses can be entered.
29.4 Manage Terminated User Accounts

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 User Accounts link on left navigation pane.
2. Enter First Name, Last Name, Member ID and/or Agency.
3. Click on Search.
4. Click on Select.
5. Remove Termination Date.
6. Click on update. Now employee’s profile will be moved back to Manage Employee/Roles page.
CHAPTER 30: DES I-TEAMS EMPLOYEES

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, DES staff needing access to I-TEAMS, DDD Early Intervention staff including all employees, contractors, subcontractors and volunteers.

30.0 DES I-TEAMS Employees

I-TEAMS uses different functionalities to manage Non-DES users and ADES users. ADES employee’s supervisor submits a Service Desk ticket requesting the employee have access to I-TEAMS and their role. DDD Security will review the Service Desk Ticket and request permission from the AzEIP Data Manager or DDD Supervisor. Once the access is approved, the Service Desk will create the employee's account and notify the employee and Supervisor that the account was created.

ADES Employees are not required to register to I-TEAMS as they use their Active directory credentials (D# and password) to login into I-TEAMS.

30.1 Add DES Employee/Assign Roles

A DDDSecurity Role user has permissions to add new DES employees under their organization to I-TEAMS, assign their roles and assign contracts to the employee. The Add DES Employee/Assign Roles page allows DDDSecurity to add DES Employees to I-TEAMS.

![Add DES User Employee Form](image_url)
Steps to Add DES Employees, Assign Roles and Assign Contracts

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

1. Click on Add DES Employee/Assign Roles link on the left navigation pane.

2. *Enter DES User Login ID. The Employee Login ID is the D or C number assigned to the staff matching the active directory. Employees must be added to the active directory prior to creating an I-TEAMS account.

3. Select Title.

4. *Enter employee’s First Name.

5. *Enter employee’s Last Name.

6. Enter District/Program (DDD Central, DDD East, DDD North, DDD, South, DDD West, Central Office, DTS, AzEIP, etc.).

7. Enter Job Title.

8. Select Central Registry Completed Status.

9. Enter Date Central Registry Completed.

   A. If Central Registry is “Completed”, you must enter the actual date it occurred in the Date Central Registry Completed field.

   B. If Central Registry is “Not Completed”, the Date Central Registry Completed field will be grayed out.

10. *Enter Employee Identification Number (EIN).

11. *Enter Employee Email address.

12. *Select employee Roles. User has the optional buttons Select All Roles and Clear All Roles. One employee can be assigned multiple roles.

   Note: Please see table below for more information about each roles.

13. Click on Add to successfully save. Message will be displayed “Employee has been added successfully. Registration Code will be emailed at Employee Email. Select the Contract(s) to be assigned below.”


   A. Select Contract Name. All active contracts under user’s organization will be displayed in drop-down list.

   B. Enter Employee Start Date.
C. Click on Add to save successfully.

Roles that can be assigned to DDD and other DES users:

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DDDAdmin</td>
<td>Program director/manager of an Organization will have permissions for all child records and all employees under that organization.</td>
</tr>
<tr>
<td>Data Entry Expanded</td>
<td>User under specific contract will have access to all child records under their contract.</td>
</tr>
<tr>
<td>DESReadOnly</td>
<td>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.</td>
</tr>
<tr>
<td>DDDService Coordinator</td>
<td>Service Coordinators under specific contracts will only have access to records assigned to them.</td>
</tr>
<tr>
<td>Prof Provider</td>
<td>Professional Providers are direct service providers under specific contracts will only have access to records assigned to them. Professional Providers include DDD Service Coordinators working in early intervention.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Supervisors under specific contract will have access to all child records and employees under their contract.</td>
</tr>
<tr>
<td>DDDSecurity</td>
<td>Staff 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.</td>
</tr>
</tbody>
</table>

For other roles, please contact the AzEIP Data Manager if uncertain or additional support is needed for which role to assign.

30.2 Manage DES Employee/Roles

A DDD Security role user has permissions to modify employee information, change/assign new roles and assign employees to new contracts through Manage DES Employee/Roles page.
Steps to Manage DES Employee/Roles

1. Click on Manage DES Employee/Roles link on left navigation pane.
2. Enter First Name, Last Name, Member ID and/or Agency.
3. Click on Search.
4. Click on Select to open and manage Employee Information.
5. Click on Edit to update information.
6. Update employee’s information needed and then click on Update to successfully save changes.

30.3 Manage DES Employee Profile

Whenever a new employee is added to I-TEAMS through Add DES Employee/Assign Roles page, an DES Employee Profile will be automatically created in Manage Employee Profile page. Contract Admin can add/edit or delete Employee Address, Phone Number, and Email in Manage DES Employee Profile page. When Employee Name updated in Manage Employee Profile page, it will be automatically updated in Manage DES Employee/Roles page.
Steps to Manage DES Employee Profile Information

1. Click on Manage DES Employee Profile link on left navigation pane.
2. Enter First Name, Last Name, Member ID and/or Agency.
3. Click on Search.
4. Click on Select.
5. Click on Edit to edit Employee Profile.
6. Click on Update to successfully save changes.
7. Click on Cancel to cancel updates or changes.

Steps to Add/Edit/Delete Employee Address

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

1. *Enter the employee’s address on Address Line One and Address Line Two (if applicable). This is a Required Filed.
2. *Enter City using text box. This is a Required Filed.
3. Select State.
5. *Select Address Type.
6. User may select Is ACP if employee is enrolled in Address Confidentiality Program.
7. Click on Add.
8. Select correct address from the Address Verification pop-up window.
9. Click on Save Chosen Address.
10. Click on Edit to make changes to employee address and then click on Update to successfully save changes.
11. Click on Delete to remove employee address.

Steps to Add/Edit/Delete Employee Phone Number

1. Enter Phone Number with extension (if applicable).
2. Select Phone Type.

3. Click on Add to successfully save information.

4. Click on Edit to update or make changes to employee Phone Number.

5. Click on Update to successfully save changes.

6. Click on Delete to remove employee Phone Number.

7. Multiple Phone Numbers can be entered.

**Steps to Add/Edit/Delete Employee Email Address**

1. Enter Email Address.

2. Select Email Type.

3. Click on Add to successfully save information.

4. Click on Edit to make any changes to email address.

5. Click on Update to successfully save changes.

6. Click on Delete to remove employee Email Address.

7. Multiple Email addresses can be entered.

**30.4 Manage Terminated User Accounts**

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 User Accounts link on left navigation pane.

2. Enter First Name, Last Name, Member ID and/or Agency.

3. Click on Search.

4. Click on Select.

5. Remove Termination Date.

6. Click on update. Now employee’s profile will be moved back to Manage Employee/Roles page.
CHAPTER 31: PROFESSIONAL PROVIDERS
REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

31.0 Professional Providers

Professional Provider includes DSI, OT, PT, SLP, SC, Psychologist, Social Worker, Nurse, Physician, Hearing Specialist, Audiologist and Vision Specialist, Deaf Mentor, Teacher of Deaf and Hard of Hearing, Teacher of the Visually impaired.

31.1 Manage Professional Provider

A Professional Provider must be successfully registered in I-TEAMS. Upon first login, they can complete their Professional Provider Profile. Manage Professional Provider page allows Professional Providers and Contract Admin to complete and manage their Professional Provider Profile.
Steps for Professional Provider to complete Professional Provider Profile page

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

A Professional Provider enters required information based on their ‘Professional Discipline’.

1. Click on Manage Professional Provider link on the left navigation pane.
2. *Select Professional Discipline.
3. Enter License Number (if applicable). This is a required field when a therapist (PT, OT, SLP), Social Worker or Psychologist is selected as Professional Discipline.
4. Enter License Expiration Date (if applicable). This is a required field when a therapist (PT, OT, SLP), Social Worker or Psychologist is selected as Professional Discipline.
5. Enter AHCCCS ID. This is a required field when a therapist (PT, OT, SLP) is selected as Professional Discipline.
6. Enter Certification Number.
7. Enter National Provider Identifier. This is a required field when a therapist (PT, OT, SLP) is selected as Professional Discipline.
8. Select Type of Degree.
9. Select Field of Study.
10. If Field of Study is not in drop down list, select Other and enter Field of Study Other. This is a required field when Field of Study Other is selected.
11. *Select EI Counties Served in which Professional Provider will provide services. This is a required field, at least one county should be selected. User can select more than one county.
12. Enter Started At AzEIP date. This is the date the professional first started working with AzEIP as a Professional Provider.
13. AzEIP Standards of Practice Due Date field auto-populates three years from date Professional Provider started with AzEIP.
14. Enter Fingerprint Expiration Date.
15. Enter Total Hours Professional Provider works in early intervention per week. This can be calculated by adding Hours Per Week from all active contracts assigned to
the provider.

16. Click on Insert to save successfully.

After Professional Provider Profile has been successfully created, page will be refreshed. Provider will see Manage Professional Provider Information page. Click on ‘Select’ to go to Profile page where provider is able to edit and update their profile.

**Steps for Professional Provider to add New Contract Information**

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

1. Click on Select from Manage Professional Providers page.

2. Select ‘Add New Contract Information’ from drop down list at top right side of the profile page.

3. User will see Professional Information page.
4. *Select Early Intervention Agency.


6. Select Relationship to Organization.

7. Enter Subcontractor Name, if applicable when Subcontractor is selected as Relationship to Organization.

8. *Select EI Services Provided. Select all services that provider will provide according to their education and qualification.

9. Select ‘Other Early Intervention Services’ if service is not within the list of EI Services Provided. Enter Services for other.

10. Enter Hours Per Week. This is the number of hours per week that service can be provided for selected contract.

11. Click on Insert to save successfully.

Note: EIP Affiliation Status will be displayed as Pending until Contract admin to
change it to Active.

Steps for Contract Admin to complete on Professional Provider Profile page

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

*Professional Provider must complete their profile and accepts contracts before starting steps for Contract Admin.*

1. Click on Manage Professional Provider from left navigation pane.
2. Search for employee by First Name and/or Last Name.
3. Click on Select to go to Provider’s Profile.
4. Click on Standards of Practice.
   A. Click on Edit to enter Standards of Practice details.
   B. Click on Update to save successfully.
   C. Click on Return to Professional Provider List to go back to Professional Provider Profile page.
5. Select contract from List of Contracts drop down list at top right side of Profile page.
6. Click on Edit.
7. *Change EIP Affiliation Status from Pending to Active.*
8. *Enter Effective Begin Date.*
9. Click on Update to save changes successfully.
CHAPTER 32: ADDITIONAL INFORMATION

REVISION DATE: July 2022
EFFECTIVE DATE: July 2022
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

32.1 Steps to complete when an employee leaves organization

Note: Steps below must be completed by Contract Admin/ASDB Admin/DDD Security Roles for Professional Providers.

1. If the employee is a Professional Provider, then enter Assignment End date for the employee in all records assigned to the employee.

2. Click on Manage Professional Provider link on left navigation pane.
   A. Search for employee by First Name and/or Last Name.
   B. Click on Select to go to Provider’s Profile.
   C. Select correct contract from -- List of Contracts -- drop down list at top right side of Profile page.
   D. Click on Edit.
   E. Change EIP Affiliation Status to Inactive.
   F. Save Effective End Date.
   G. Click on Update to save changes successfully.

3. Click on Manage Employee/ Roles link on left Navigation pane.
   A. Search for employee by First Name and/or Last Name.
   B. Click on Select to go to Provider’s Profile.
   C. Click on Edit under list of contracts on the bottom of the page.
   D. Enter Employee End Date.
   E. Click on Update to save changes successfully.
   F. Click on Edit under employee details.
G. Enter Termination Date.

H. Click Update. Now the employee profile will be moved under Manage Terminated User Accounts.

*Note: DO NOT remove contract assigned to employee and DO NOT remove employees from their roles.*

### 32.2 Steps to complete when employee’s Role/Discipline changes

*Note: Steps below must be completed by Contract Admin/ DDD Admin. Do not make any changes to an employee’s Role/Discipline until below steps has been completed.*

1. Verify all billing has been entered into I-TEAMS for employee.

2. Verify all child records assigned to employee have been end dated and re-assigned.

3. Update Manage Employee/Roles page.
   
   A. Click on Manage Employee/Roles for Non-DES employees or Manage DES Employees/Roles for ADES Employees link on left navigation pane.
   
   B. Locate employee by First Name and/or Last Name
   
   C. Click on Select to open employee Information.
   
   D. Click on Edit to update Job Title.
E. Click on Update to successfully save changes.

4. Update Manage Professional Provider page.
   A. Click on Manage Professional Provider link on left navigation pane.
   B. Search for employee by First Name and/or Last Name.
   C. Click on Select to go to Provider’s Profile.
   D. Click on Edit.
   E. Update Professional Discipline.
   F. Click on Update to save changes successfully.
   G. Select correct contract from -- List of Contracts -- drop down list at top right
      side of Profile page.
   H. Click on Edit.
   I. Update EI Services Provided.
   J. Click on Update to save changes successfully.

32.3 Steps to complete when an employee joins new Organization

1. Steps to follow by Contract Admin of PREVIOUS organization:
   A. Follow steps listed under section 10.1 (Steps to complete when an
      employee leaves organization)

2. Steps to follow by Contract Admin of NEW organization:
   A. Contact I-TEAMS Helpdesk to assign new contract to employee.

   Note: Please **DO NOT** create new employee profile (new employee login ID) if
   employee already has existing profile in I-TEAMS. However a new profile may
   need to be created when an employee transfers in or out of DES to either
   ASDB or an AzEIP contractor.
   B. Update information in Manage Employee/ Roles and Manage Employee
      Profile pages if needed.
   C. Employee must accept new contract in their Manage Professional Provider
      page.
   D. Contract Admin follows Steps for Contract Admin to complete on
      Professional Provider Profile page, including changing EIP Affiliation Status
      from Pending to Active and entering Effective Begin Date.