I-TEAMS MANUAL

CHILD

Arizona Department of Economic Security
Early Intervention Program

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CHAPTER 1: I-TEAMS OVERVIEW

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
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) 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 partner 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 information.
6. Eligibility information.
7. IFSP information.
8. Service Delivery.

9. Transition.
10. Transfer child record to new region.
11. Entry and Exit indicator information.
12. Exit record.
13. Invoice/Billing/Payments.
14. TPL information.

1.2 User Access Levels

I-TEAMS uses role-based access control approach which restricts system access only to authorized users. Access levels and permissions in I-TEAMS is 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 using the I-TEAMS URL below:
https://extranet.azdes.gov/AzEIP/AzEIP_ITEAMS/Account/Login.aspx

Click on **Agree** button from **User Agreement** page to access the I-TEAMS **Login** page. Enter **Username** and **Password** to login to I-TEAMS.

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. Current Date and Time.
   B. Links including DES, FAQs, Contact us, Reports, Forms and Office Locator.
   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 and My Children 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. 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. A user can search for a child record using any combination of available search field choices. 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. 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 direct the user directly in to 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

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

CHAPTER 2: REFERRAL

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

2.0 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), DES/AzEIP, DDD or ASDB. The URL to AzEIP's Online Referral Application is: https://extranet.azdes.gov/azeip/azeipref/Forms/Categories.aspx
Central Referral Phone: (602) 635-9799/ (602) 635-9810 Spanish

2.1 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 for either an open record or an exited record.

Steps to Search for Referral Match

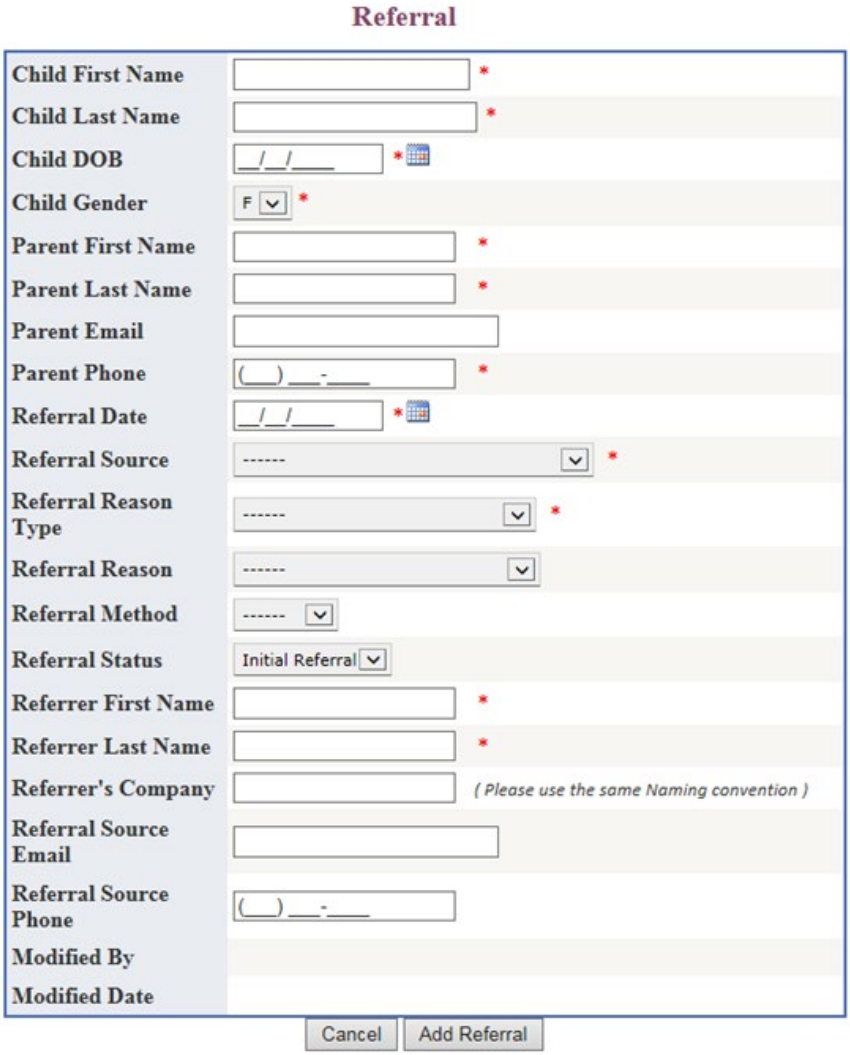
Note: This page allows users to search with partial values (for example first few letters of child's name can be used) to check for multiple potential matching child records.

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, child has never been referred to AzEIP and proceed to Add New Referral.

2.2 Add New Referral

Add New Referral page allows user to enter new referral to I-TEAMS which will create a new I-TEAMS record for the child.



Steps to Add New Referral

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

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.
14. Select Referral Method.
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 Cancel button to erase all the information entered without saving it.
22. Click on 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 Add New Referral page.

24. If system does not find a possible match, record will be added successfully.

25. If system does find a possible match, Child ID, Name, DOB, Gender, Status of the record (Open/Exited) and aren't name will be displayed at the bottom of the with message "Possible matches are found for the child".

26. If the record has a status of Exited user will see 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.

2.3 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 3: CHILD DEMOGRAPHICS

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3.0 Child Demographics

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

3.1 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. I-TEAMS ID: Auto generated unique number assigned to each child record in I-TEAMS to identify a child record.
2. CIF/Assist ID: Auto generated unique number assigned to each child record used to connect with DDD data system FOCUS.
3. Child: Child's last name and first name.
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, AT) that serve the child. If child is eligible for multiple programs, Primary Agency will be highlighted in yellow.
8. Contract Region: Name of the program and region that child is associated with. It lists all contract regions if child is eligible for multiple programs.
9. 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 45th day timeline, this date will be highlighted in RED.

3.2 Child Information

Basic information of child is saved in this section. Any changes on child's Name, DOB or Gender in Child Demographics page will automatically update header of child record as well as 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. *Enter Gender.
5. *Select School District of Residence. Click on Find School District to lookup school district on AZ Department of Education website.
6. 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.
7. Click on Save at the bottom of Child Demographics page to save changes successfully.

3.3 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 using which user can select all 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, list of languages will be displayed in drop-down list and user can select a language.
6. Child Resides With will be auto populated with Adult Type from Adult (parent, guardian, caregiver) section.

7. Click on Save button at the bottom of the page to save changes successfully.

3.4 Child Address

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

Note: Child's actual address should not be listed anywhere in I-TEAMS if they are part of ACP.

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 need to update it:

   A. Click on Edit.

   B. Make necessary changes and then click on Update.

   C. 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 the number.

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.

3.5 Contract Region and Service Coordinator

User can assign Contract Region to a child record via Demographics page only once, which is during initial referral intake process and it will be saved as Primary Contract in Assign/Change Team Member page. I-TEAMS automatically assigns contract region to child record if zip code of child's address is in a single contract region. User can select contract from the drop-down list if the zip code of child's address is in a region with multiple contracts.

Note: Click on Save located at the bottom of Child Demographics page after child address is saved, to display only contracts associated to the region based on child's zip code.

User can assign Service Coordinator to a child record via Demographics page only once, which is during initial referral intake process which will be saved in Assign/Change Team Member page. List of active Service Coordinators associated with assigned contract of child record will be listed in the drop-down list.

3.6 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 I-TEAMS.

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.

3.7 Siblings

Information about child's sibling under three being/has been served by AzEIP, DDD, ASDB or AT 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 other children being served in the same home as the child, but not siblings, i.e., foster children.

3.8 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 Information.
3. Insurance/TPL Waiver.
4. Assign/Change Team Members.
5. Eligibility.
6. IFSP Information.
7. Child Entry Indicator Summary Form.
8. Service Delivery.
9. Transfer Child.
10. Transition Child.
11. Child Exit Indicator Summary Form.
12. Exit Child Record.

3.9 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.

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 when it was entered will be displayed along with the comment.

CHAPTER 4: ASSIGN/CHANGE TEAM MEMBERS

REVISION DATE: November 2018
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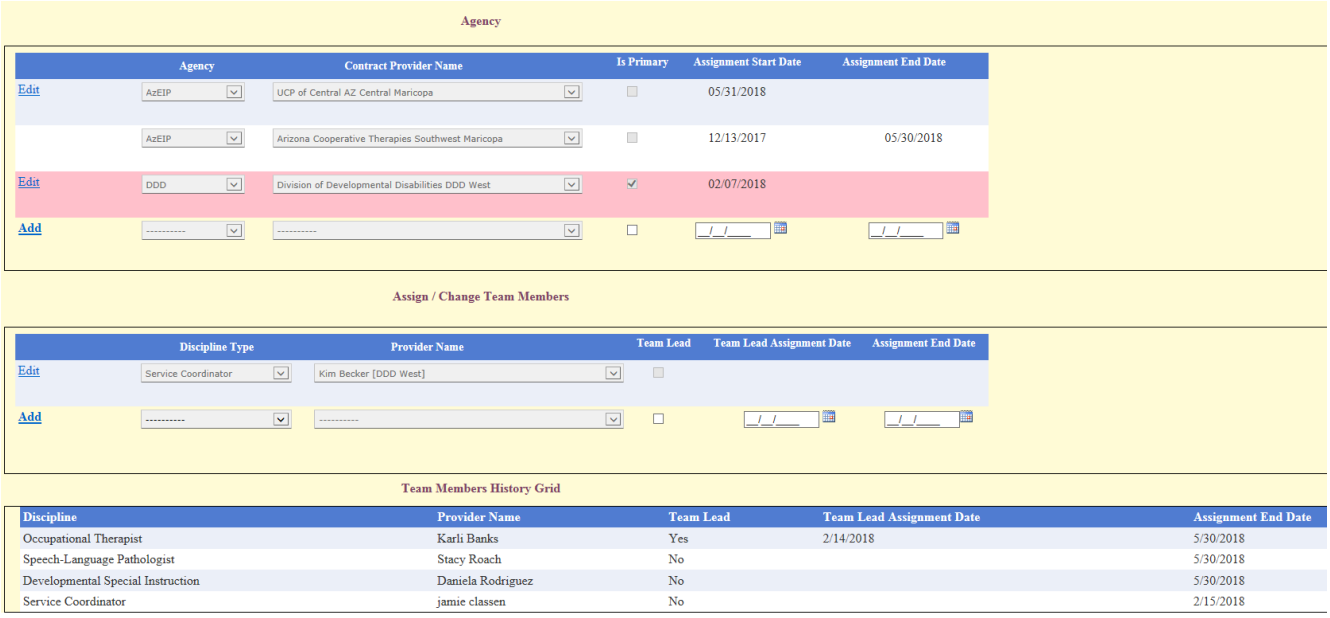
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

4.0 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.



4.1 Agency

Agency section displays both active and historic details about a child's Agency, Contract Provider name and duration each agency and contract has 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, AT) 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.

C. User should add AT as an Agency when AT service is listed in active IFSP. AT should never be listed as a primary agency.

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.

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

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, ASDB or AT eligible child records.

   A. For DDD eligible children, Assignment Start Date should be DDD Eligibility Date.

   B. For ASDB eligible children, Assignment Start Date should be the date the child is referred to one of the participating agencies, either ASDB, or AzEIP, whichever agency received the referral first and the child is found to have ASDB qualifying condition.

   C. For children receiving AT services, Assignment Start Date should be IFSP Date where AT service has been identified.

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 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.

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 District or when child is no longer ASDB eligible.

C. Assignment End Date for AT must be entered when AT services are no longer on the plan.

Note: Do NOT save Assignment End Date for AzEIP during record transfers.

4.2 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 and AT discipline will be available to 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 Team Lead.
4. Team Lead Assignment Date can be entered only for Team Lead. If Team Lead Assignment Date is not entered for Team Lead, I-TEAMS will automatically assign the date when Team Lead was entered into I-TEAMS.
5. Assignment End Date can be entered to end date active team member and assign new team member.

4.3 Team Members History Grid

All assigned team members of previous/inactive contracts will be displayed in the history grid with Discipline, Provider Name, Team Lead Yes/No, Team Lead Assignment Date for Team Lead and Assignment End Date for each team member.

Steps to assign DDD as Primary and assign DDD Service Coordinator

1. Verify if 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. Go to 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 mark AzEIP as not 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: Do not End date AzEIP agency.

Steps to assign ASDB Agency and ASDB Provider

1. Verify if Eligibility page shows ASDB Eligibility Decision as Yes. If not, please contact I-TEAMS Help Desk to enter ASDB eligibility details to child record.
2. Go to 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 ASDB Referral 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, which should be ASDB Referral Date from Eligibility page.
   D. Click on Add to save successfully.

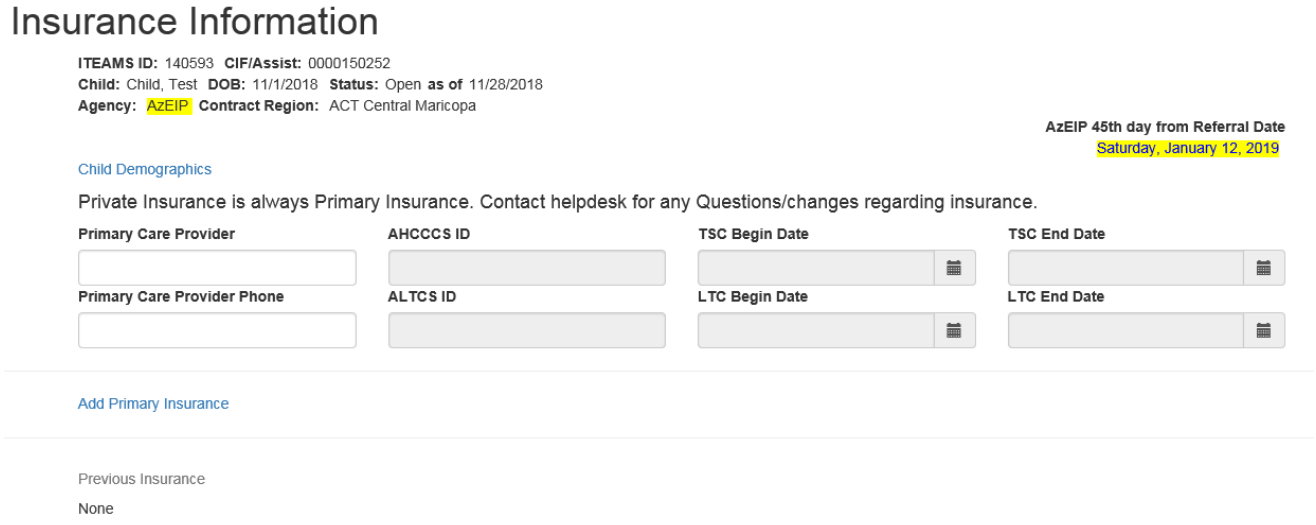
Steps to Assign AT Agency and AT Provider

1. Verify if AT- Service is listed on active IFSP in IFSP page.
2. Go to Assign/Change Team Member page from Additional Data section at bottom of the child record.
3. Assign AT under Agency section:
   A. Select AT from Agency drop-down list.
   B. Select AT-Statewide contract from Contract Provider Name drop-down list.
   C. Enter Assignment Start Date.
   D. Click on Add to save successfully.
4. Assign AT Provider under Assign/Change Team Members section:
   A. Select Discipline Type from drop-down list.
   B. Select Provider Name from drop-down list.
   C. Click on Add to save successfully.

CHAPTER 5: INSURANCE INFORMATION
REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

5.0 Insurance Information

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



User can see child's AHCCCS and ALTCS eligibility dates which are pushed from FOCUS. They are read-only values for all I-TEAMS users.

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

Steps to enter Primary Care Provider details

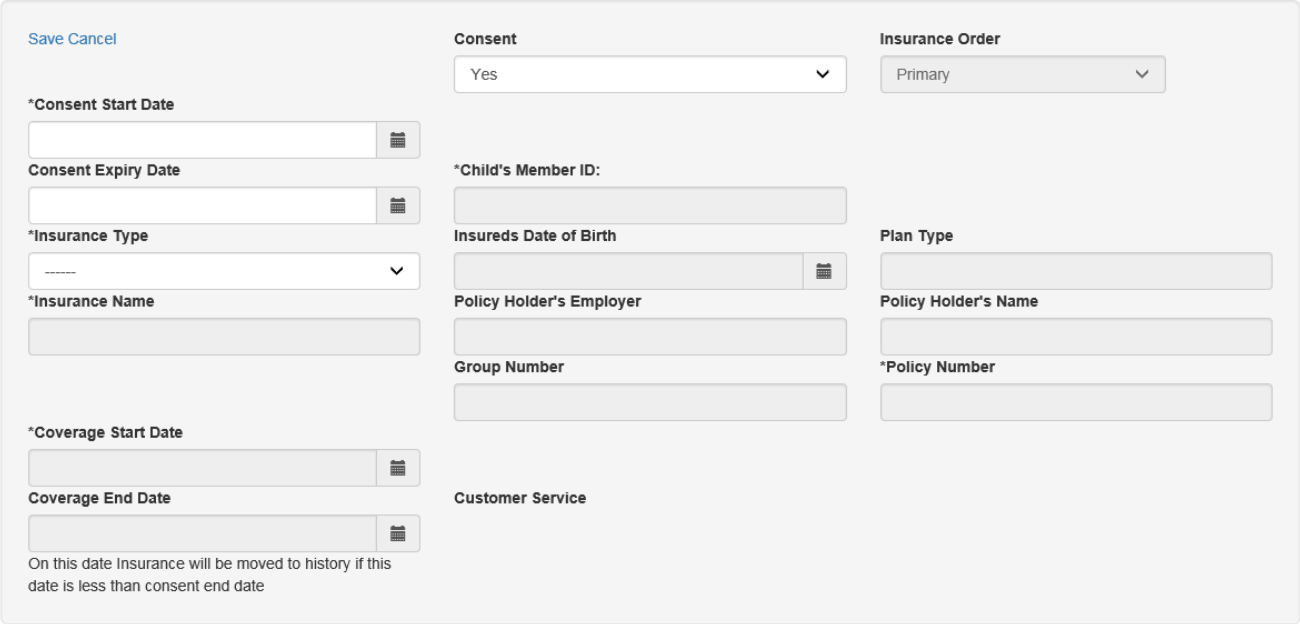
1. Enter Primary Care Provider.
2. Enter Primary Care Provider Phone.

3. Click on Save Primary Care.

5.1 Active Insurance(s)

Active Insurance(s) section allows users to enter Insurance details to child record and displays all active insurances (Primary and/or Secondary). Each insurance is associated with a unique Insurance ID. User can enter only two active insurances to a record. Any additional insurance entry will move active insurance to the history (Previous Insurance section). 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

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

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

2. If record has no previous insurance saved, then proceed to step 4.

3. If record has existing active Primary Insurance, user must update Consent Expiry Date to date before the new Consent Start Date before new Insurance is entered. Click on Yes to enter new Primary Insurance (Existing active insurance will be moved to Previous Insurance section). Click on No to keep active Primary Insurance.

   Note: User must update Consent Expiry Date to date before the new Consent Start Date

before new Insurance is entered.

A. If Consent Expiry Date entered is less than today's date, then active insurance will be moved to Previous Insurance section automatically.

B. If Consent Expiry Date is not entered, system will auto populate with date before the date when new insurance is entered.

4. Click on Add Primary Insurance.

5. *Select Consent.

C. *User must select Consent No Reason if Consent is selected as No. This field will be displayed only when Consent is No.

D. *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.

6. *Enter Consent Start Date.

7. *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.

8. *Enter Insurance Name. When user type Insurance Name, list of available insurances will be listed according to Insurance Type selected.

9. *User must enter Child's Member ID when Insurance Type is Private.

10. *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.

11. Enter Policy Holder's Employer.

12. Enter Policy Holder's Name.

13. Enter Plan Type.

14. *User must enter Group Number when Insurance Type is Private.

15. Enter Policy Number.

16. *Enter Insureds Date of Birth.

17. *Enter Coverage Start Date.

18. Enter Coverage End Date. Active Insurance will be automatically moved to Previous Insurance on Coverage End Date.

19. Click on Save to save Insurance details successfully.

20. Click on Yes if all information entered is accurate and ready to save. User will not be able to make any changes Insurance once it is saved. Click on No to review.

21. 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 a particular insurance.

    B. Insurance Customer Service.

    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 on Consent Expiry Date.

Steps to enter Secondary Insurance

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

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

2. Click on Add Secondary Insurance.

    A. If record has no insurance saved, then proceed to step 3.

    B. If record has existing active Secondary Insurance, user must update Consent Expiry date before new Insurance is entered. Existing Insurance will be moved to Previous Insurances. Click on Yes to enter new Secondary Insurance. Click on No to keep active Secondary Insurance.

3. Please refer steps to enter Primary Insurance (steps 3-21).

Steps to enter Primary insurance when child has only one insurance which is Public

1. Click on Edit.

2. Change Insurance Order from Primary to Secondary.

3. Click on Update to save changes successfully.

4. Click on New Primary.

5. Please refer steps to enter Primary Insurance (steps 3-21).

5.2 Previous Insurance

This section displays history of previous insurances. User cannot make any changes to previous insurances.

CHAPTER 6: INSURANCE/TPL WAIVER

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

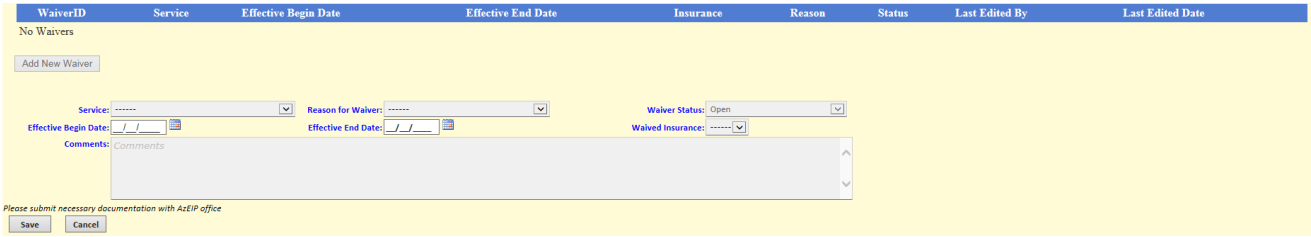
6.0 Insurance/TPL Waiver

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 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 moved to history:

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.



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. Enter Effective Begin Date.

6. 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.

7. Select Waived Insurance. I-TEAMS will display both Active and Previous insurances saved in child record between Effective Begin Date and Effective End Date.
8. Enter Comments as additional information about the waiver.
9. Click on Save to save waiver successfully.
10. Click on Edit to make changes to active Waiver.
11. Make necessary changes and then click on Save.
12. If user makes any changes to an Approved waiver, Waiver Status will automatically change back to Open.

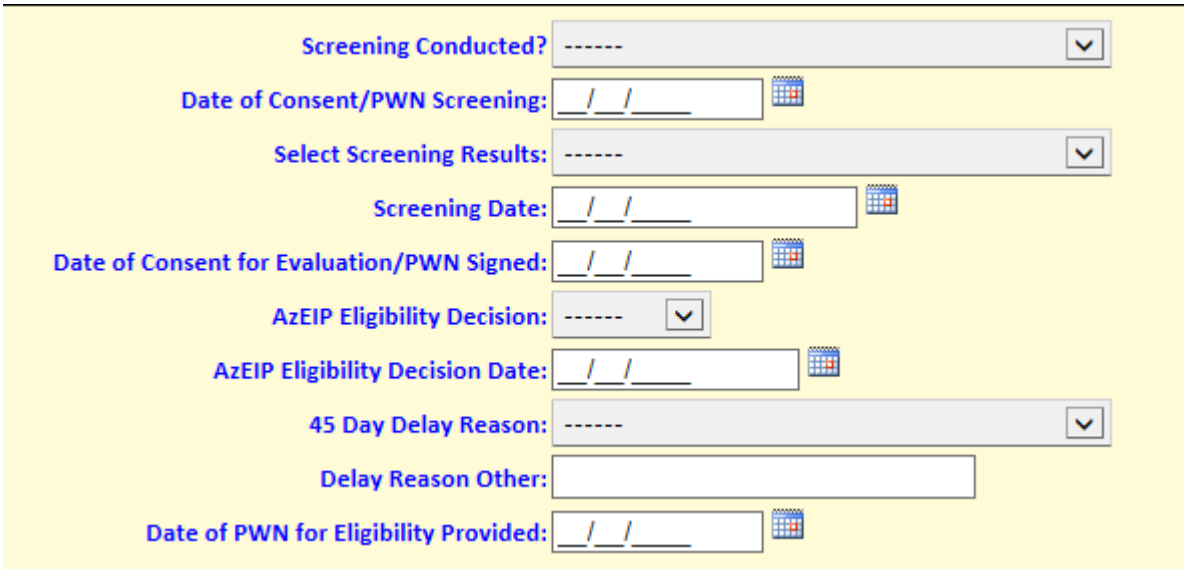
CHAPTER 7: ELIGIBILITY
REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

7.0 Eligibility

Eligibility page allows user to save details of the AzEIP eligibility determination process including Evaluation, Screening, Prior Written Notice, AZEIP Eligibility Decision, Re-determination 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 Information page.

7.1 AzEIP Eligibility



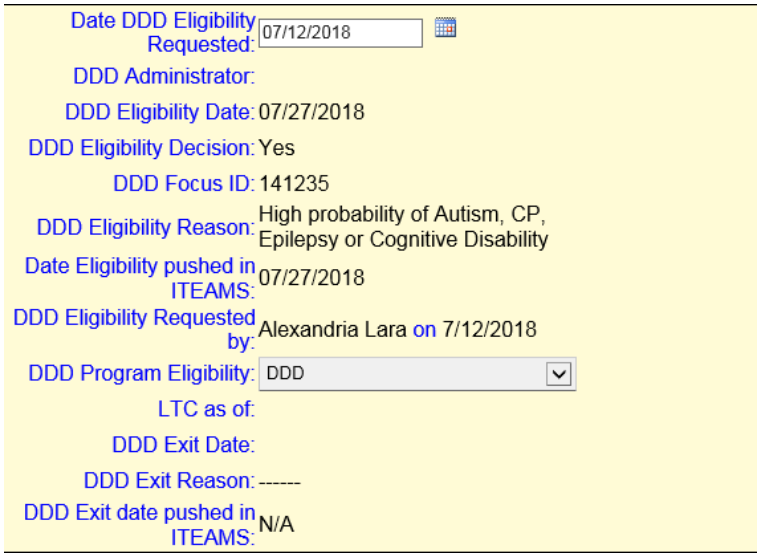
Steps to enter AzEIP eligibility information

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 entered 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.

7.2 DDD Eligibility



Child must be AzEIP eligible and Insurance Information page must include Family consent (Yes, Yes-HSA, Yes-HRA, No Insurance, No-HSA or No-HRA) in order to be able 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. 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 are list of mandatory fields to successfully save Date DDD Eligibility Requested:

A. Child Demographics page:

Child Name Last.

Child Name First.

Date of Birth.

Gender.

Child Address.

School District of Residence.

Race/Ethnicity.

Language of Home.

Responsible Party should be Yes.

Responsible Party First Name.

Responsible Party Last Name.

Responsible Party Address.

Child/Responsible Party Phone.

B. Referral page:

Referral Reason Type.

Referral Date.

Referrer First Name.

Referrer Last Name.

Referrer Phone.

Referrer Address.

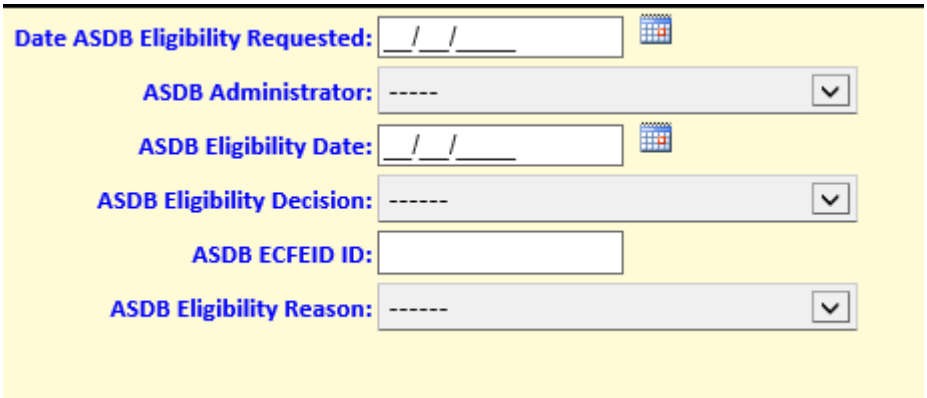
Authorized DDD personnel determines DDD eligibility and enters DDD eligibility details in FOCUS. An electronic automated process (AKA "push pull" process between I-TEAMS and FOCUS) pushes DDD Eligibility information to I-TEAMS from FOCUS at midnight each night. DDD Eligibility details are read-only for 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.

7.3 ASDB Eligibility



If child becomes ASDB eligible, ASDB eligibility details must be entered first in order to assign child record to ASDB agency.

Please contact I-TEAMS Help Desk to enter ASDB eligibility details to child record.

CHAPTER 8: IFSP INFORMATION

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

8.0 IFSP Information

IFSP Information page allows user to create 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 Information 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. DO NOT edit existing IFSP to enter new IFSP. All closed IFSPs will be displayed after active IFSP.

Steps to create Initial/Interim IFSP

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

1. *Select IFSP Type.
2. Initial IFSP Date is a read-only field and will be auto populated with IFSP date when Initial IFSP is saved successfully.
3. *Enter IFSP Date.
4. Active Team Lead is auto populated from Assign/Change Team Member page.
5. *Select answer to Parent Consent as Written.
6. If No is selected, Comments and Date PWN Provided fields will be displayed. User can enter reason for not consenting and any services that parent did not consent in Comments. Enter PWN Provided date.
7. *Enter Consent Date.
8. Primary Service Setting is a read-only field and it will be auto populated with Service Setting value from IFSP services when services are successfully saved.
9. Over 45 day reason will be auto populated from eligibility page when Initial IFSP is saved if IFSP Date is more than 45 days past Referral Date.
10. Click on Save IFSP to save IFSP successfully.

11. 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 ISP date.

12. 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. Changes cannot be made to Closed IFSP.

2. Click on Create New IFSP.

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 Create New IFSP button to close the IFSP.

4. *Select IFSP type.

Note: When IFSP Type is 6 Month Review or Other Review, IFSP Date is a read-only field with Initial IFSP date if Annual IFSP was never saved on the record, otherwise IFSP Date will display most recent Annual IFSP date.

5. *When IFSP Type is Annual, user must enter Annual IFSP date in IFSP Date.

6. *When IFSP Type is Other Review or 6 Month Review, user must enter IFSP Review Date. It will be displayed only when IFSP Type is 6 Month Review or Other Review.

7. *Select Parent Consent as written Yes or No.

8. *Enter Consent Date.

9. Click on Save IFSP to save successfully.

10. 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.

11. Once IFSP is saved successfully, proceed to enter services to IFSP

Steps to Enter IFSP Services

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

1. Click on Add New Services. This button will be enabled only when IFSP is successfully saved.

2. *Select Service.

Note: Service Coordination is a required service on every IFSP.

3. *Select correct Discipline of selected Service.

Note: If incorrect Discipline is selected then services may become non billable during invoice creation.

4. *Select service Frequency:

    A. Select Frequency (Daily, Weekly, Monthly etc.) service will be provided 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.) of each service delivery from second drop-down list.

5. *Select Service Setting. If Other is selected, user must enter type of location.

6. *Enter Planed Start Date.

Note: The Planned Start Date for a service cannot be before the current IFSP date.

7. *Enter Planned End date. Max End Date is calculated as 12 months from the initial IFSP 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.

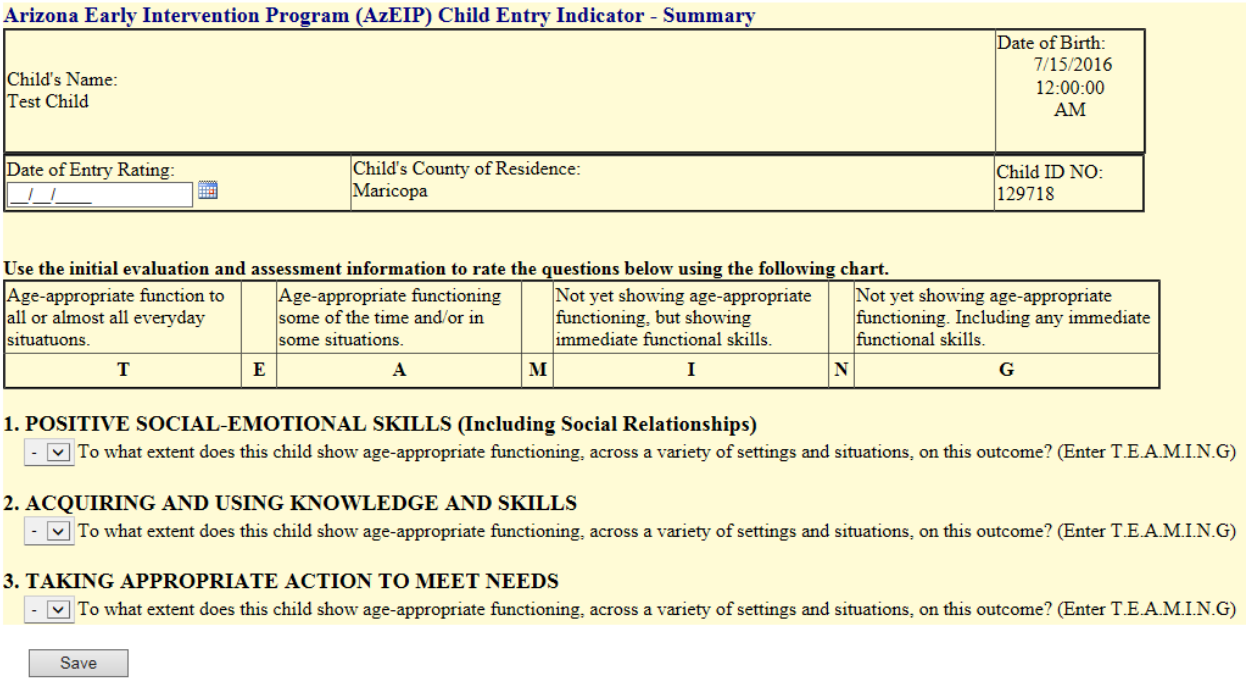
CHAPTER 9: CHILD ENTRY INDICATOR SUMMARY FORM

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

9.0 Child Entry Indicator Summary Form

Child Entry Indicator page allows user to save child entry indicator ratings. I-TEAMS will only allow user to enter child entry indicator data if child is less than 2 years 6 months old. Child Entry Indicator Summary is only completed for children who have the potential to receive services for at least 6 months since Referral Date.

Refer to AzEIP Policy and Procedure manuals for definitions of the scoring values T-E-A-M-I-N-G. The Child Outcomes Report uses the information entered in to I-TEAMS and shows T=7, E=6, A=5, M=4, I=3, N=2, G=1.



Arizona Early Intervention Program (AzEIP) Child Entry Indicator - Summary

Child's Name: Test Child		Date of Birth: 7/15/2016 12:00:00 AM
Date of Entry Rating: __/__/____	Child's County of Residence: Maricopa	Child ID NO: 129718

Use the initial evaluation and assessment information to rate the questions below using the following chart.

Age-appropriate function to all or almost all everyday situatuons.		Age-appropriate functioning some of the time and/or in some situations.		Not yet showing age-appropriate functioning, but showing immediate functional skills.		Not yet showing age-appropriate functioning. Including any immediate functional skills.
T	E	A	M	I	N	G

1. POSITIVE SOCIAL-EMOTIONAL SKILLS (Including Social Relationships)
- To what extent does this child show age-appropriate functioning, across a variety of settings and situations, on this outcome? (Enter T.E.A.M.I.N.G)

2. ACQUIRING AND USING KNOWLEDGE AND SKILLS
- To what extent does this child show age-appropriate functioning, across a variety of settings and situations, on this outcome? (Enter T.E.A.M.I.N.G)

3. TAKING APPROPRIATE ACTION TO MEET NEEDS
- To what extent does this child show age-appropriate functioning, across a variety of settings and situations, on this outcome? (Enter T.E.A.M.I.N.G)

Save

Steps to Enter Child Entry Indicator Summary Form

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

1. Click on Child Entry Indicator Summary Form link from Additional Data section at bottom of the child record.
2. Child's Name, Date of Birth, Child's County of Residence and Child ID NO are read-only

fields and are auto populated from Child Demographics page.

3. *Enter Date of Entry Rating.
4. *Select rating for POSITIVE SOCIAL-EMOTIONAL SKILLS (Including Social Relationships).
5. *Select rating for ACQUIRING AND USING KNOWLEDGE AND SKILLS.
6. *Select rating for TAKING APPROPRIATE ACTION TO MEET NEEDS.
7. Click on Save to successfully save Child Entry Indicator Summary ratings.

CHAPTER 10: SERVICE DELIVERY

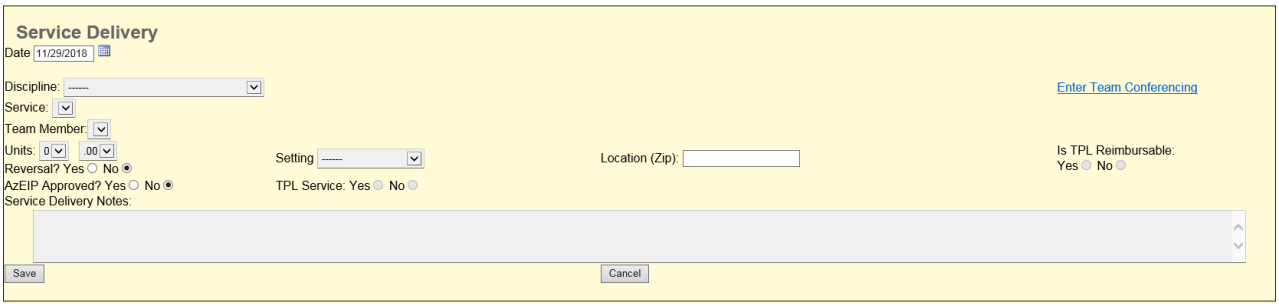
REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

10.0 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 AzEIP Billing Manual for more information.

10.1 Service Delivery entry



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 Date when service was provided.
3. *Select Discipline.
4. *Select Service.
    A. List of Service items are displayed according to Discipline selected.
    B. When a Service item with –-[IFSP]-- is selected, IFSP Service 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 Team Member. If Discipline selected is not assigned to child record in Assign/Change Team Members page:
    A. Select Team Member as Non-Team Member.

B. Enter Full name of the Team Member per team member's I-TEAMS profile (Manage Employee page).

6. *Enter Units.

7. Select Reversal? if applicable. Please refer steps to enter Reversal below for more information on Reversal.

8. Select Setting if applicable.

9. Location (Zip) will be auto populated with zip code of active Child Address from Child Demographics page. User can change Location (Zip) if applicable.

   Note: If the service delivery entry is after record is transferred to different region, please update Location (Zip) with correct zip code to avoid billing denials.

10. TPL Service will be Yes for all TPL billable services regardless of Discipline.

11. Waiver will be auto populated Yes or No based on active/historical waivers. Waiver will be displayed only if TPL service is Yes.

12. Is TPL Reimbursable? will be Yes/No based on below table. TPL Reimbursable are services that are billable to Insurance if family has provided consent and waiver is not in place and its only applicable for PT, OT, SLP. Services will be available in Third Party Liability page only when Is TPL Reimbursable is Yes.

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

13. Enter Amount. Amount will be displayed only when Discipline is selected as Audiologist/Hearing specialist/Nurse/Physician/Registered Dietician/Vision specialist or when Service item is selected as Assistive Technology Device/Transportation Service.

    Note: User must enter total Amount for selected units not a rate per unit. For example, if you are billing for 2 units at $100 per unit then you would enter the full $200 in this field.

14. Enter Service Delivery Notes if applicable.

15. Click on Save to save successfully.

16. Click on Cancel to cancel service delivery entry.

10.2 Review and Edit Service Delivery entry

Number Of Records to View: 25

	Service ID	Date	Discipline	Service	Provider	IFSP Service						
Edit	2381285	10/17/2018	Service Coordinator	Meeting	Alexandria Lara		Units: 0.75	Not IFSP	Location: 85226	Setting: Home	TPL Service: No	TPL Reimbursable: No
Edit TPL	1465991	9/26/2018	Speech-Language Pathologist	Team Lead	Amber Sampson	Speech and Language Pathology Services	Units: 0.75	Remaining: 18.00	Location: 85226	Setting: Home	TPL Service: Yes	TPL Reimbursable: Yes
Edit	2381286	9/12/2018	Developmental Special Instruction	Meeting	Sara Cherepinsky		Units: 0.75	Not IFSP	Location: 85226	Setting: Home	TPL Service: No	TPL Reimbursable: No
Edit TPL	1461530	9/5/2018	Speech-Language Pathologist	Team Lead	Amber Sampson	Speech and Language Pathology Services	Units: 1.00	Remaining: 18.75	Location: 85226	Setting: Home	TPL Service: Yes	TPL Reimbursable: Yes

User can 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 servicer delivery entries. Each Service Delivery entry is associated with a unique ID and displays details including:

A. Status of Service Delivery (Edit, Edit-TPL, Pending, Reviewed) shows if the service has been invoiced or not. If the service is not invoiced user will see Edit and user can click on Edit to update service delivery if applicable. If Invoice is saved as Draft, then status will be Pending. If Invoice has been submitted successfully, service Delivery status will be Reviewed.

B. Date of Service Delivery.

C. Discipline of the provider.

D. Service Catalog.

E. Name of the Provider.

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

G. Units.

H. Remaining or Not IFSP explains whether or not service is pulling units from IFSP. IFSP services pulls units from IFSP and displays Remaining units. IPP and Non IFSP services are marked as Not IFSP.

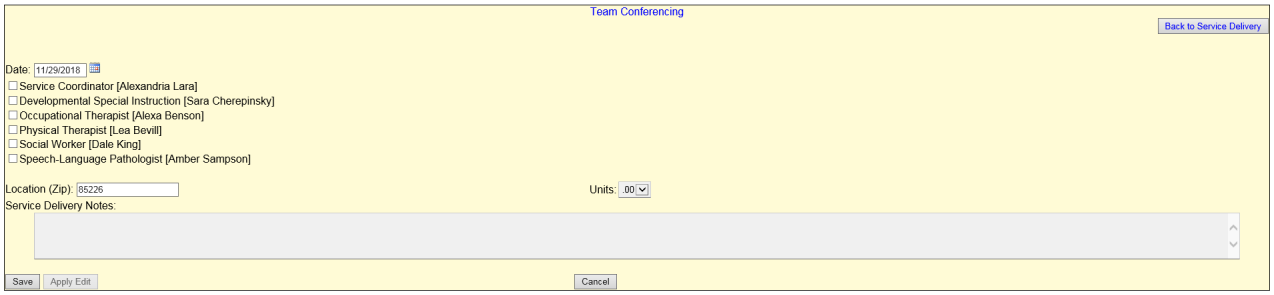
I. Location Zip Code.

J. Service Setting.

K. Whether or not service is TPL or regular.

L. Whether or not TPL Reimbursable.

Steps to enter Team Conferencing



1. Click on Enter Team Conferencing.
2. Enter Date.
3. Select applicable Disciplines.
4. Location (Zip) will be auto populated with zip code of active Child Address from Child Demographics page. User can change Location (Zip) if applicable.
5. Select Units.
6. Enter Service Delivery Notes if applicable.
7. Click on Save to successfully save Team Conferencing.
8. Click on Back to Service Delivery to go back to Service Delivery page.

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 successfully save changes.
5. Click on Cancel to cancel changes.

Steps to enter Reversal

Note: Reversal is entered when a service is previously billed and paid by mistake. Service Delivery details must be entered in a manner identical to the paid service.

1. Enter Date.
2. *Select Discipline.
3. *Select Service Catalog.
4. *Select Team Member.
5. *Select Units.
6. Select Reversal? as Yes.
7. Select Setting if applicable.
8. Location (Zip) will be auto populated with zip code of active Child Address from Child Demographics page. User can change Location (Zip) if applicable.
9. Enter Service Delivery Notes if applicable.
10. Click on Save to save successfully.

Note: Units will be marked in Red with negative for Reversal Services.

CHAPTER 11: TRANSFER CHILD

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

11.0 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.

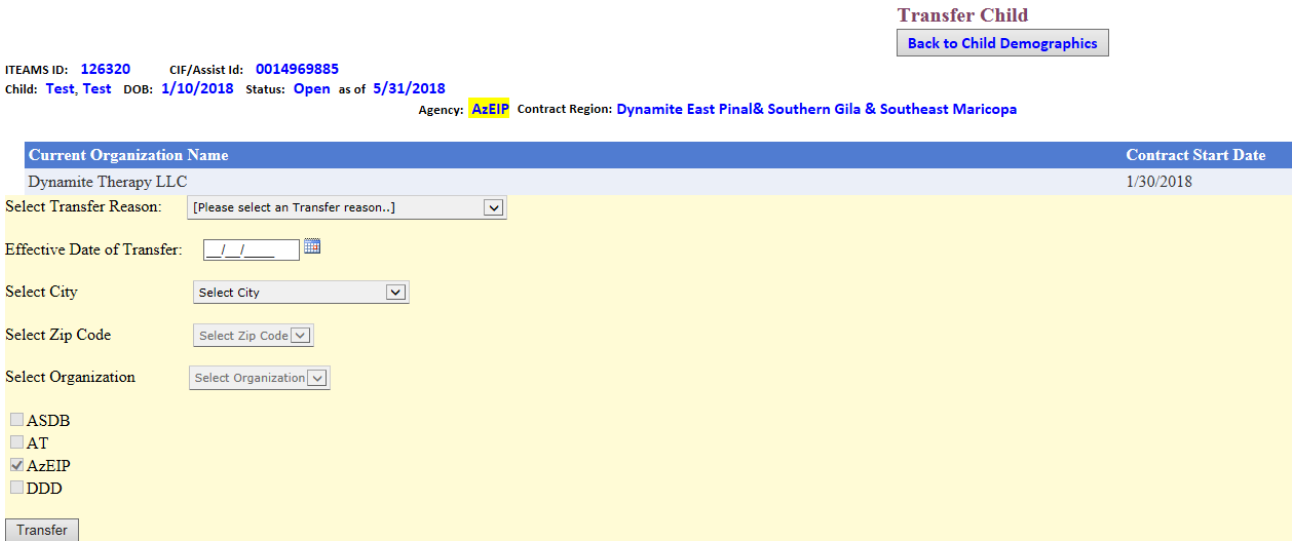
Child's record transfer will only be complete if:

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 30 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.
3. *Select Transfer Reason.
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.
6. *Select Zip Code related to the selected City.
7. *Select Organization. Organization will be displayed based on the zip code selected.
8. Click on Transfer.
9. I-TEAMS will display a pop-up message to confirm Transfer Child Record.
    A. Click on YES to procced to Transfer Child Record.
    B. Click on NO to keep child record open.
10. 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.

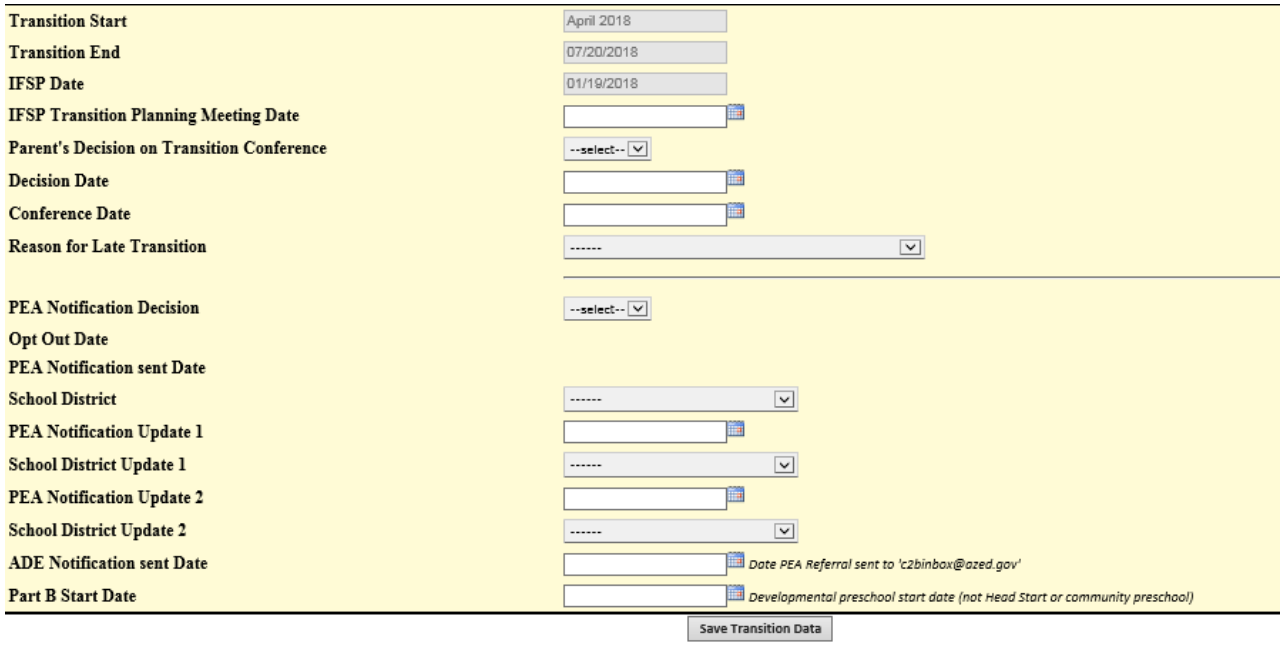
Note: If the child is DDD and/or ASDB eligible, and the newly assigned EIP is a different DDD unit and/or ASDB Regional Provider, please work with currently assigned DDD SC and/or

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 12: TRANSITION CHILD
REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

12.0 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. Transition Start is a read-only field and is auto calculated as 2 years 6 months from child's DOB.
3. Transition End is a read only field and is auto calculated as 2 years 9 months from child's DOB.
4. IFSP Date is a read only field and is auto displayed as the most recent IFSP Date from IFSP page.
5. Enter IFSP Transition Planning Meeting Date.

6. Select Transition Steps Documented on IFSP.
7. Select Parent's Decision on Transition Conference.
8. *Enter Decision Date.
9. Enter Conference Date when Parent's Decision on Transition Conference is selected as Yes.
10. Select Reason for Late Transition if Conference Date is late based on AzEIP Transition policy.
11. Select PEA Notification Decision.
12. *Enter Opt Out Date when PEA Notification Decision is No.
13. *Enter PEA Notification sent Date when PEA Notification Decision is Yes.
14. Select School District.
15. Click on Save Transition Data to save information successfully.

Note: If there is any change in Parent's Decision on Transition Conference and if it's after 2 years and 9 months, enter Reason for Late Transition.

Steps to Edit and Update Transition Child information

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

If PEA Notification Decision changes from Yes to No and the PEA has already been sent, noted the notes DO NOT make changes in I-TEAMS.

If PEA Notification Decision changes from No to Yes, document in the notes and update I-TEAMS.

1. Click on Transition Child link from Additional Data section at bottom of the child record.
2. Click on Edit Parent Agree Record.
3. Update existing information or enter additional information as needed.
4. Enter PEA Notification Update 1, if applicable.
5. Select School District Update 1, if applicable.
6. Enter PEA Notification Update 2, if applicable.
7. Select School District Update 2, if applicable.

8. Enter ADE Notification sent Date which is the date PEA Referral sent to 'c2binbox@azed.gov'.
9. Enter Part B Start Date (the date child starts school district developmental preschool not Head Start or community preschool), if known. User will not be able to edit this date once it is saved. Contact I-TEAMS Help Desk to make any changes.
10. Click on Update Parent Agree Record to save information successfully.

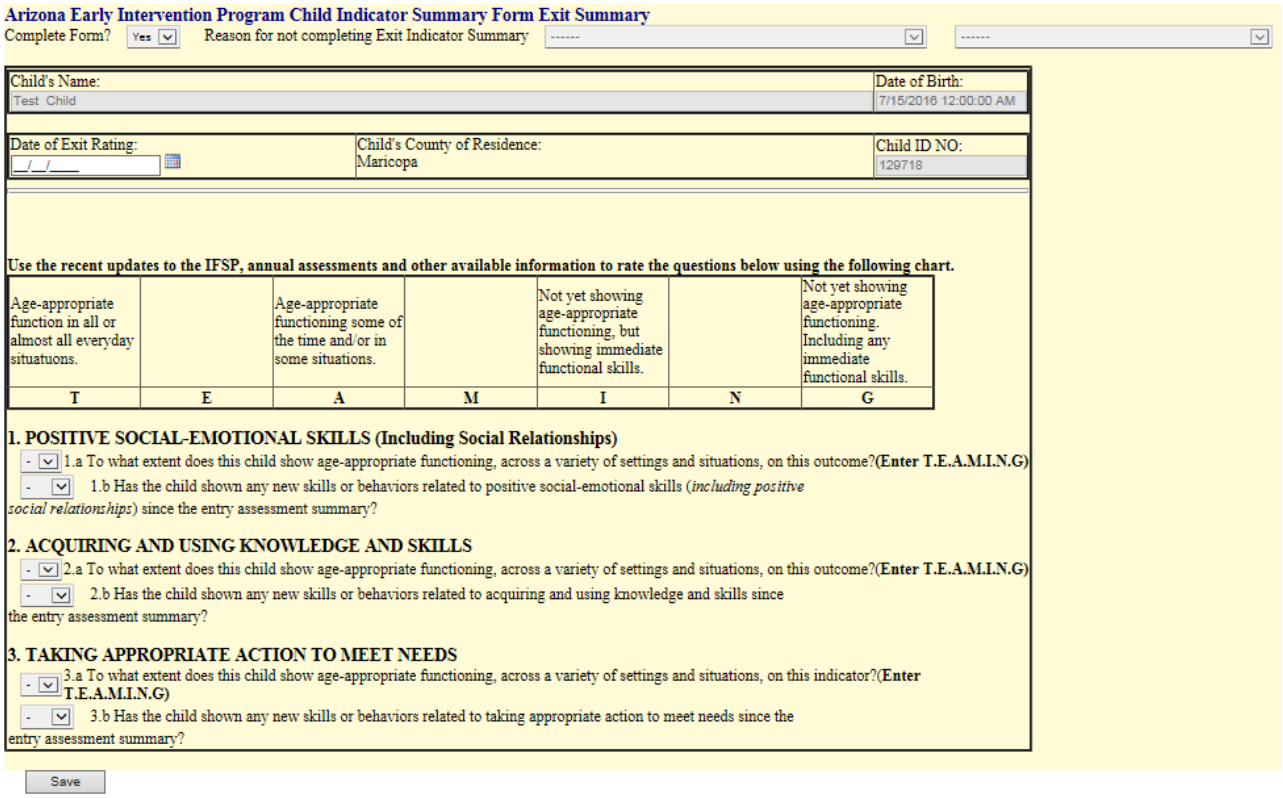
CHAPTER 13: CHILD EXIT INDICATOR SUMMARY FORM

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

13.0 Child Exit Indicator Summary Form

Child Exit Indicator page allows user to save results of the Child's Exit Indicator Summary process at the time child is exiting AzEIP if the child is eligible and has been receiving services for at least 6 months since Referral Date. I-TEAMS will only allow user to enter child exit indicator data if child's age is less than 2 years and 6 months.

Refer to the AzEIP Policy and Procedure manuals for definitions of the scoring values T-E-A-M-I-N-G.


Arizona Early Intervention Program Child Indicator Summary Form Exit Summary
Complete Form? Yes Reason for not completing Exit Indicator Summary ------ ------

Child's Name:	Date of Birth:
Test Child	7/15/2016 12:00:00 AM

Date of Exit Rating:	Child's County of Residence:	Child ID NO:
__/__/____	Maricopa	129718

Use the recent updates to the IFSP, annual assessments and other available information to rate the questions below using the following chart.

Age-appropriate function in all or almost all everyday situatuons.		Age-appropriate functioning some of the time and/or in some situations.		Not yet showing age-appropriate functioning, but showing immediate functional skills.		Not yet showing age-appropriate functioning. Including any immediate functional skills.
T	E	A	M	I	N	G

1. POSITIVE SOCIAL-EMOTIONAL SKILLS (Including Social Relationships)
- 1.a To what extent does this child show age-appropriate functioning, across a variety of settings and situations, on this outcome?(Enter T.E.A.M.I.N.G)
- 1.b Has the child shown any new skills or behaviors related to positive social-emotional skills (*including positive social relationships*) since the entry assessment summary?

2. ACQUIRING AND USING KNOWLEDGE AND SKILLS
- 2.a To what extent does this child show age-appropriate functioning, across a variety of settings and situations, on this outcome?(Enter T.E.A.M.I.N.G)
- 2.b Has the child shown any new skills or behaviors related to acquiring and using knowledge and skills since the entry assessment summary?

3. TAKING APPROPRIATE ACTION TO MEET NEEDS
- 3.a To what extent does this child show age-appropriate functioning, across a variety of settings and situations, on this indicator?(Enter T.E.A.M.I.N.G)
- 3.b Has the child shown any new skills or behaviors related to taking appropriate action to meet needs since the entry assessment summary?

Save

Steps to enter Child Entry Indicator Summary Form

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

1. Click on Child Exit Indicator Summary Form link from Additional Data section at bottom of the child record.

2. Select answer to Complete Form?. User can only enter rating only if Yes is selected.
3. Select Reason for not completing Exit Indicator Summary from drop-down list which will be displayed only if No is selected in Complete Form? When team has insufficient knowledge of child's functioning due to is selected as the reason, select specific reason from the second drop-down list.
4. Child's Name, Date of Birth, Child's County of Residence and Child ID NO are read only fields and are auto populated from Child Demographics page.
5. *Enter Date of Exit Rating.
6. *Select rating and progress for POSITIVE SOCIAL-EMOTIONAL SKILLS (Including Social Relationships). If user selects No after choosing a rating higher than the entry rating, then a message will be displayed saying "Impossible – Rating show progress".
7. *Select rating and progress for ACQUIRING AND USING KNOWLEDGE AND SKILLS. If user selects No after choosing a rating that is higher than the entry rating, a message will be displayed saying "Impossible – Rating shows progress".
8. *Select rating and progress for TAKING APPROPRIATE ACTION TO MEET NEEDS. If user selects No after choosing a rating that is higher than the entry rating, then a message will be displayed saying "Impossible – Rating shows progress".
9. Click on Save to save information successfully.

Note: If user gets the "Impossible - Ratings show progress" error message, please enter a new rating or YES must be selected in order to save the ratings.

CHAPTER 14: EXIT CHILD RECORD

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

14.0 Exit Child Record

Exit Child Record page allows user to exit child record by saving child's Reason for Exit and Exit Date 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, so user can double 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.

CHAPTER 15: RE-OPEN CHILD RECORD

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

15.0 Re-Open Child Record

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

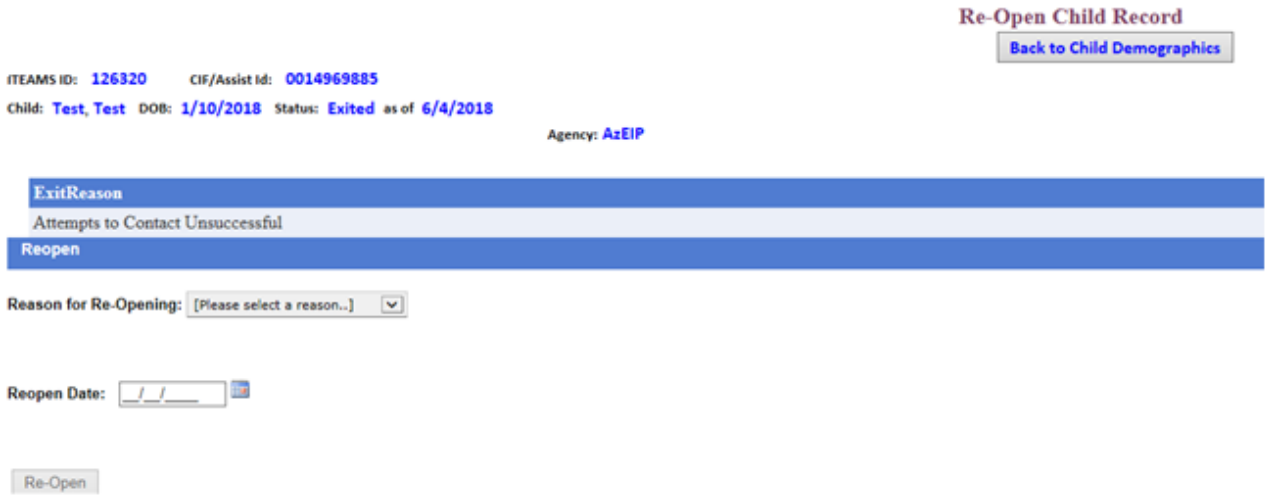


Table below describes conditions on which a record must be Re-opened, any other scenarios would be considered as Re-refer.

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

Note: Please contact I-TEAMS Help Desk if system is preventing user to Re-Open child record for above scenarios.

Steps to Re-open Child Record

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

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

CHAPTER 16: THIRD PARTY LIABILITY

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

16.0 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, user must enter Insurance company decision and other details in TPL page before submitting TPL Invoice.

16.1 Third Party Liability search

User 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. User must click on Select to open TPL service page to enter TPL information.

Select	ITEAM ID	Child Last Name	Child First Name	Service Date	Service	Provider	Invoice Status
Select	108389	Vanwagner	Thane	4/18/2018	Speech and Language Pathology Services	Thorn, Stacey	Not Invoiced
Select	127643	McGaha	Pandora	4/18/2018	Occupational Therapy	Travis, Brittany	Not Invoiced
Select	121756	Session	Hailey	4/18/2018	Occupational Therapy	Wheeler, Tammy	Not Invoiced
Select	124152	Aispuro	Angel	4/17/2018	Occupational Therapy	Wheeler, Tammy	Reviewed
Select	113918	Esquivel	Victoria	4/17/2018	Speech and Language Pathology Services	Thorn, Stacey	Not Invoiced
Select	124286	Hamblin	Willie	4/17/2018	Occupational Therapy	Travis, Brittany	Not Invoiced

Steps to search for TPL

1. Click on Third Party Liability link from 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.

16.2 TPL information entry

User can enter Insurance Company Decision, Decision Date and Reimbursed amount 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. Click on Edit.
2. *Select Insurance Company Decision.

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

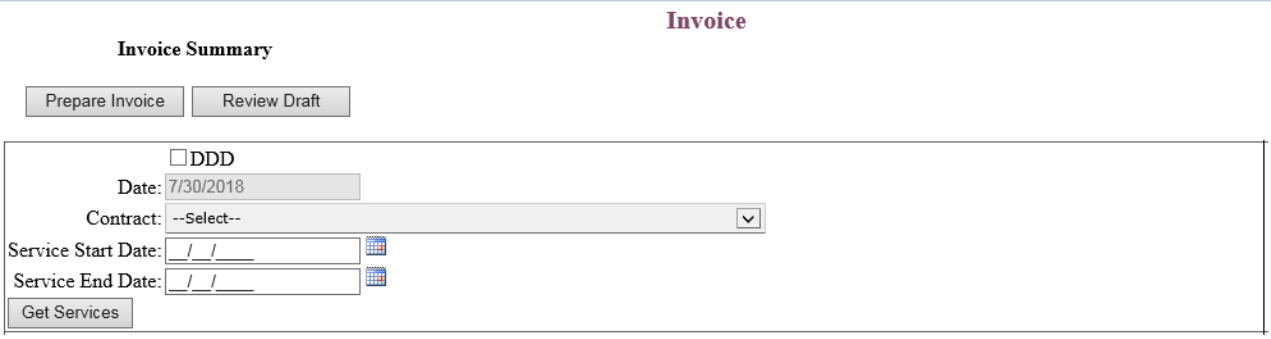
   A. When Insurance Company Decision is selected as Denied, user must select Reason For Denial.
3. *Enter Insurance Decision Date.
4. *Enter Amount.
5. Click on Save All Active TPL Records to save TPL information successfully.
6. Remainder will be auto populated as Amount deducted from Extended Amount

CHAPTER 17: CREATE INVOICE

REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

17.0 Create Invoice

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



Steps to Create Invoice

1. Click on Create Invoice link from left navigation pane.
2. Click on Prepare Invoice.
3. Select DDD if preparing Invoice for DDD funded services (DDD eligible children).
4. Select Contract.
5. Enter Service Start Date.
6. Enter Service End Date.
7. Click on Get Services.
8. Click on View Non-Billable Services to review non-billable services.
9. Click on Save Draft.
10. Click on Review Draft.
11. Select Contract.
12. If there are multiple Invoices to be submitted under selected contract, user must select

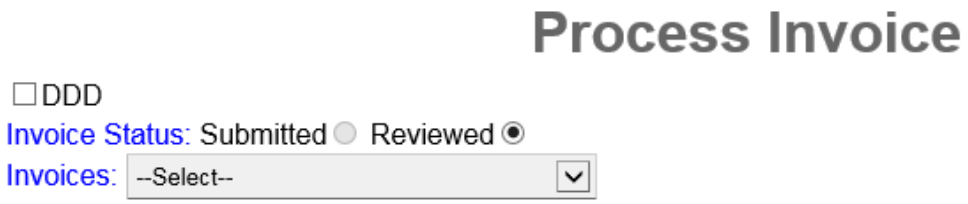
Invoice number. Otherwise Invoice Number will be auto populated.

13. Click on Retrieve Draft.
14. Click on Export to Excel to save Invoice to excel document.
15. Click on Submit to submit Invoice successfully.

CHAPTER 18: PROCESS INVOICE
REVISION DATE: November 2018
EFFECTIVE DATE: December 2018
INTENDED USER(S): All ADES/AzEIP personnel, AzEIP Service Providing Agencies including all employees, contractors, subcontractors and volunteers.

18.0 Process Invoice

User can view full details of all Reviewed Invoices including regular and TPL for both AzEIP and DDD under their contract in Process Invoice page. It will display the date when Invocie was submitted, list of serivces, total billable amount etc.



Steps to Process Invoice

1. Click on Process Invoice link from 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 user's local computer.