



EIHub

First Steps Early Intervention
Case Management System



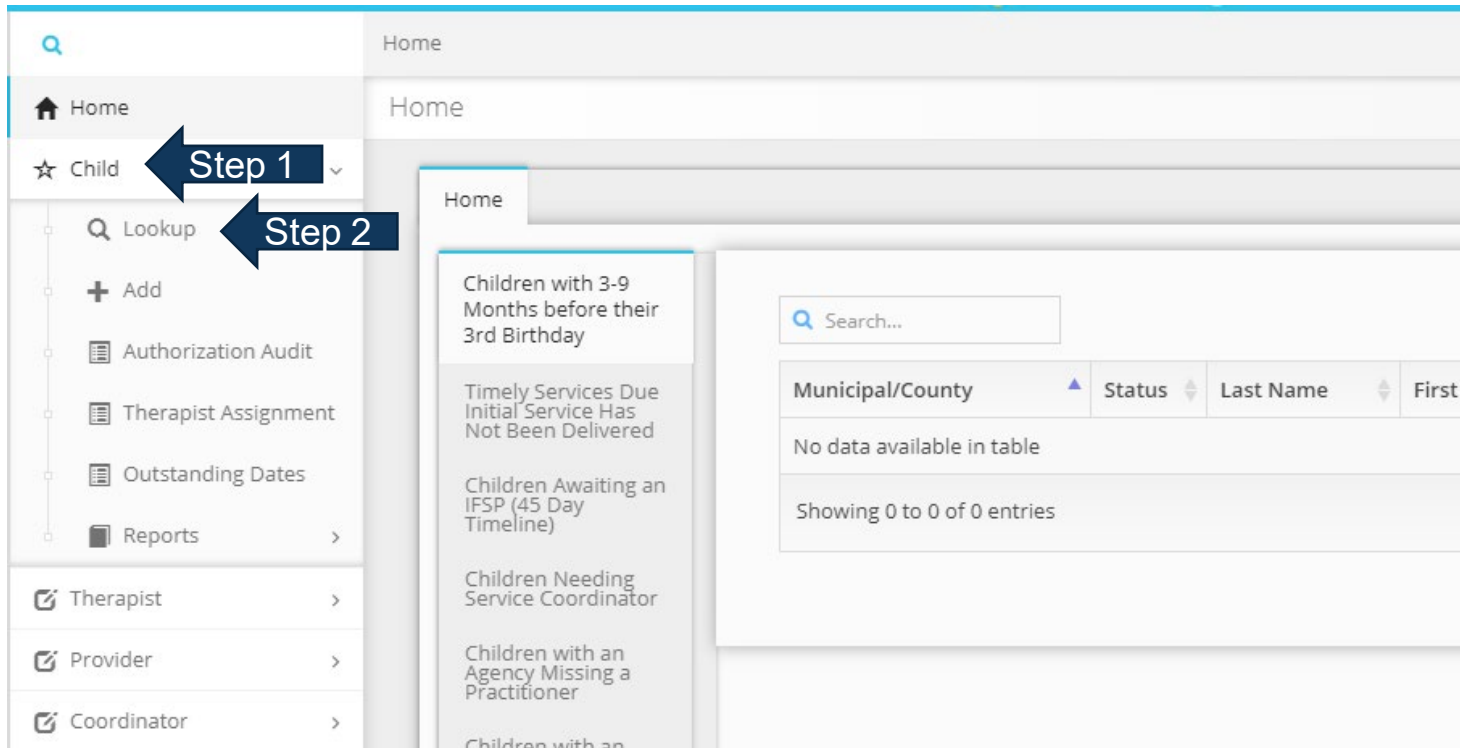
PUBLICTM
CONSULTING GROUP

Guide to
Entering a
Child Referral

Entering a Child's Referral

Child Lookup

1. Navigate to the "Child" menu
2. Select "Lookup" from the sub-menu

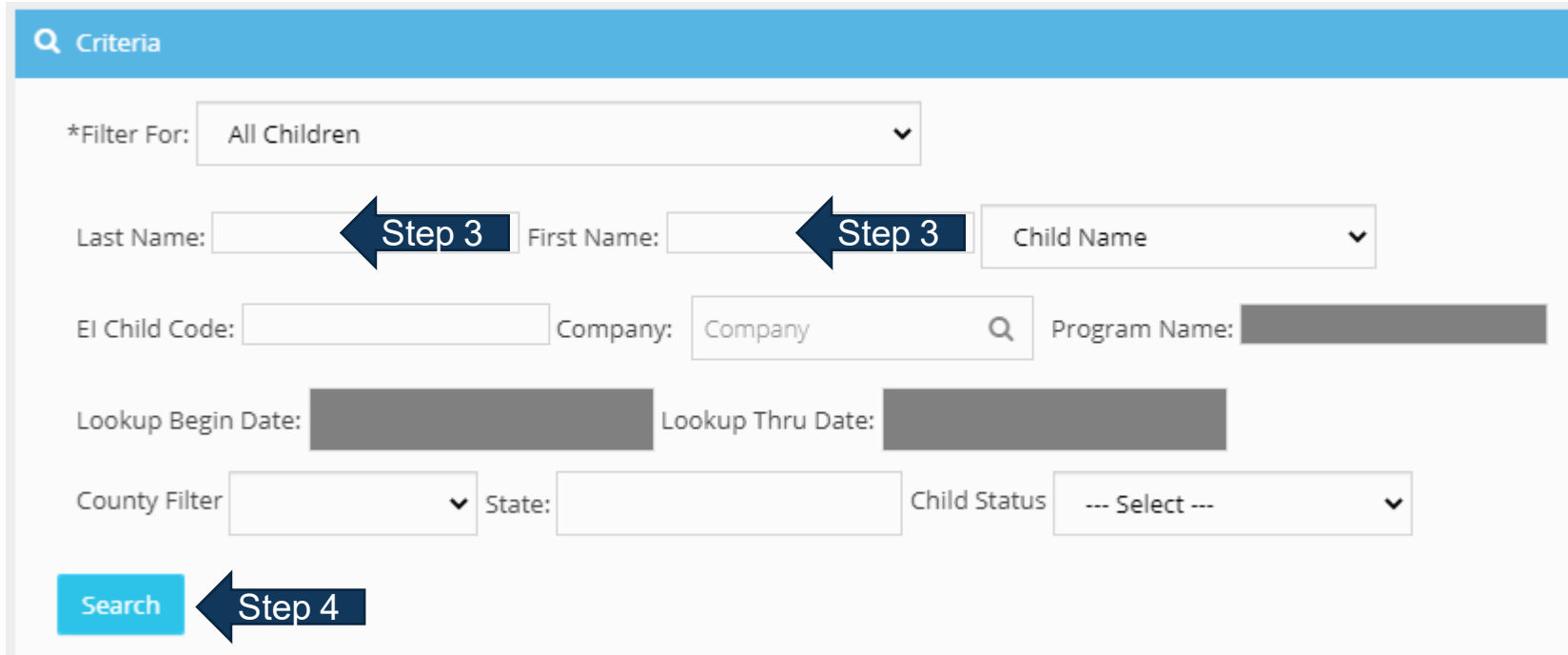


The screenshot displays a software interface with a sidebar menu on the left and a main content area on the right. The sidebar menu includes a search icon at the top, followed by 'Home', 'Child', 'Lookup', 'Add', 'Authorization Audit', 'Therapist Assignment', 'Outstanding Dates', and 'Reports'. Below these are 'Therapist', 'Provider', and 'Coordinator', each with a right-pointing arrow. Two blue arrows with white text point to the 'Child' and 'Lookup' items, labeled 'Step 1' and 'Step 2' respectively. The main content area shows a 'Home' header, a search bar, and a table with columns for 'Municipal/County', 'Status', 'Last Name', and 'First Name'. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. On the left side of the main content area, there are several informational cards with titles such as 'Children with 3-9 Months before their 3rd Birthday', 'Timely Services Due Initial Service Has Not Been Delivered', 'Children Awaiting an IFSP (45 Day Timeline)', 'Children Needing Service Coordinator', and 'Children with an Agency Missing a Practitioner'.

Entering a Child's Referral

Child Lookup

3. Search for the child's name by typing in the "Last Name" and "First Name" fields
4. Click "search"



The screenshot shows a web form titled "Criteria" with a search icon. The form contains several input fields and dropdown menus. Two blue arrows labeled "Step 3" point to the "Last Name" and "First Name" input fields. A blue arrow labeled "Step 4" points to the "Search" button at the bottom left of the form.

Criteria

*Filter For: All Children

Last Name: First Name: Child Name:

EI Child Code: Company: Program Name:

Lookup Begin Date: Lookup Thru Date:

County Filter: State: Child Status:

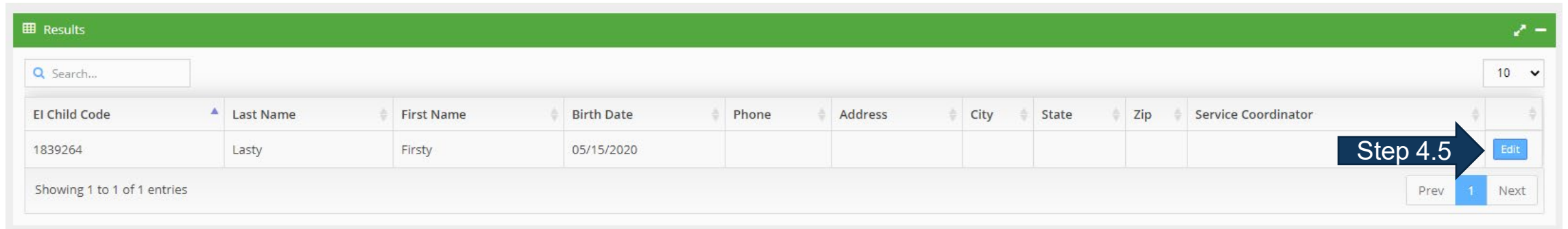
Search

Entering a Child's Referral

Existing Child Record

5. Click "Edit"

System will automatically open the child's existing record, move to step 18



Results

Search...

10

EI Child Code	Last Name	First Name	Birth Date	Phone	Address	City	State	Zip	Service Coordinator
1839264	Lasty	Firsty	05/15/2020						

Showing 1 to 1 of 1 entries

Prev 1 Next

Step 4.5

Edit

Entering a Child's Referral

No Existing Child Record

Results

Search...

10

EI Child Code	Last Name	First Name	Birth Date	Phone	Address	City	State	Zip	Service Coordinator
No data available in table									

Showing 0 to 0 of 0 entries

Prev Next

Entering a Child's Referral

Creating a New Child Record

6. Navigate to "Child" menu
7. Click "Add" from sub-menu

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes a search bar, a home icon, and a 'Child' menu item with a star icon. A blue arrow labeled 'Step 6' points to the 'Child' menu item. Below 'Child' are several sub-menu items: 'Lookup', 'Add', 'Authorization Audit', 'Therapist Assignment', 'Outstanding Dates', and 'Reports'. A blue arrow labeled 'Step 7' points to the 'Add' sub-menu item. The main content area displays a table with columns for 'Municipal/County', 'Status', 'Last Name', and 'First Name'. The table is currently empty, showing 'No data available in table' and 'Showing 0 to 0 of 0 entries'. The table is partially obscured by a sidebar on the left with various categories like 'Children with 3-9 Months before their 3rd Birthday', 'Timely Services Due Initial Service Has Not Been Delivered', etc.

Entering a Child's Referral

Creating a New Child Record

8. Navigate to the "Child Info" tab
9. Select the "Basic Demographic Info" panel

The screenshot displays a web application interface for entering a child's referral information. The interface is divided into a navigation menu on the left and a main form area on the right. The navigation menu includes tabs for "Child at a Glance", "Child Info", "Insurance Info", "Assessment", "Eligibility", "IFSP", "Services", "Transfer, Transition, Exit, Close and Re-Open", and "Child/Family Outcomes Tab". The "Child Info" tab is selected, and a blue arrow labeled "Step 8" points to it. The "Basic Demographic Info" panel is active, and a blue arrow labeled "Step 9" points to it. The form area contains the following fields:

- Child Status: A dropdown menu with "-- Select --" and a downward arrow.
- *Child's First Name: A text input field with a pencil icon.
- Child's Middle Name: A text input field with a pencil icon.
- *Child's Last Name: A text input field with a pencil icon.
- Child's Suffix: A dropdown menu with "-- Select --" and a downward arrow.
- Child's Nickname: A text input field with a pencil icon.
- Child's AKA First Name: A text input field with a pencil icon.
- Child's AKA Middle Name: A text input field with a pencil icon.
- Child's AKA Last Name: A text input field with a pencil icon.
- *Birth Date: A text input field (partially visible).

Entering a Child's Referral

Creating a New Child Record

10. Select "Referral" in the "Child Status" field
11. Enter the child's first name in the "Child's First Name" field
12. Enter the child's last name in the "Child's Last Name" field

Child Status

Referral **Step 10**

*Child's First Name

Vincent **Step 11**

Child's Middle Name

*Child's Last Name

Acklin **Step 12**

Child's Suffix

--- Select ---

Child's Nickname

Child's AKA First Name

Child's AKA Middle Name

Child's AKA Last Name

Entering a Child's Referral

Creating a New Child Record

13. Enter the child's date of birth in the "Birth Date" field
14. Select the child's race in the "Race" field
 - If unknown, select "No Race Selected"
15. Select the child's ethnicity in the "Ethnicity" field
 - If unknown, select "Unknown"

*Birth Date

05/16/2020 ← **Step 13**

Chronological Age (months and days)

9 months 17 days

Gestation Age

Unknown

Gestation Weeks

*Race

No Race Selected × ← **Step 14**

*Ethnicity

Unknown ← **Step 15**

Entering a Child's Referral

Creating a New Child Record

16. Select the child's gender under "Gender"
17. Select the child's primary language in the "Primary Language" field
 - If unknown, select "Unknown at Referral"
18. Click "Submit"

*Gender **Step 16** Male

*Primary Language **Step 17** English

If Other

Parental Consent for Service

Interpreter Needed for Child

Service Consent Date

School District --- Select ---

Step 18 Submit

Entering a Child's Referral

19. Navigate to the "Child Info" tab
20. Select the "Referral" panel
21. Click "Add"

The screenshot displays a software interface for entering a child's referral. The top navigation bar includes tabs for 'Child at a Glance', 'Child Info', 'Basic Demographic Info', 'Assessment', 'Eligibility', 'IFSP', 'Services', 'Transfer, Transition, Exit, Close and Re-Open', and 'Child/Family Outcomes Tab'. The 'Child Info' tab is selected, and a blue arrow labeled 'Step 19' points to it. On the left, a sidebar menu lists various information panels: 'Basic Demographic Info', 'Referral', 'Child Address', 'Child Secondary Languages', 'Child Note', 'Contact Log', 'Child Attributes', and 'Initial/Ongoing Service Coordinator'. The 'Referral' panel is selected, and a blue arrow labeled 'Step 20' points to it. The main content area shows a search bar, a table with columns for 'Referral Date', 'Referral Status', 'Referral Type', 'Last Name', 'First Name', and 'Is Name Withheld', and an 'Add' button. A blue arrow labeled 'Step 21' points to the 'Add' button. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are also 'Prev' and 'Next' buttons at the bottom right of the table area.

Entering a Child's Referral

The system will automatically open to the "Referral EIP Panel" panel

22. Select "Open" as the "Referral Status"

23. Enter the date the referral was made as the "Referral Date"

24. Select the way the referral was made as the "Referral Method" (e.g., Phone)

25. Select "Primary" as the "Referral Type" if this is the child's first referral

26. Select the most appropriate reason for referral as the "Referral Reason" (e.g., Physical Fine Motor)

The screenshot shows a web form titled "Referral" with a sidebar on the left containing "Referral EIP Panel" (highlighted with a blue box) and "Referral Additional Information". The main form area contains the following fields:

- *Referral Status: A dropdown menu with "Open" selected. A blue arrow labeled "Step 22" points to this field.
- *Referral Date: A text input field containing "03/03/2021". A blue arrow labeled "Step 23" points to this field.
- *Referral Method: A dropdown menu with "Phone" selected. A blue arrow labeled "Step 24" points to this field.
- *Referral Type: A dropdown menu with "Primary" selected. A blue arrow labeled "Step 25" points to this field.
- *Referral Reason: A dropdown menu with "Physical Fine Motor" selected. A blue arrow labeled "Step 26" points to this field.

Entering a Child's Referral

27. Select the most appropriate source type as the "Referral Source Type" (e.g., Doctor's Office)
28. Enter the source's first name as the "Referral Source First Name"
29. Enter the source's last name as the "Referral Source Last Name"
30. Click the "*Capturing the information..." checkbox
31. Click the "*By checking this box..." checkbox
32. Click "Submit"

The screenshot shows a web form for entering a child's referral. The form includes the following fields and options:

- *Referral Source Type:** A dropdown menu with "Doctor's Office" selected. A blue arrow labeled "Step 27" points to this field.
- Is Name Withheld:** An unchecked checkbox.
- Referral Source First Name:** A text input field containing "John". A blue arrow labeled "Step 28" points to this field.
- Referral Source Middle Name:** An empty text input field.
- Referral Source Last Name:** A text input field containing "Siegenthaler". A blue arrow labeled "Step 29" points to this field.
- *Capturing the information...:** A checked checkbox. A blue arrow labeled "Step 30" points to this checkbox. Below the checkbox is the text: "requires that informed parental consent has been obtained. Your information will not be saved or submitted if you have not indicated that parental consent has been obtained".
- *By checking this box...:** A checked checkbox. A blue arrow labeled "Step 31" points to this checkbox. Below the checkbox is the text: "indicates they have received confirmation from the referral source that the parent/legal guardian was consulted, and he/she did not object to the referral".
- Submit:** A blue button. A blue arrow labeled "Step 32" points to this button.

Entering a Child's Referral

33. Navigate to the "Referral Additional Information" panel
34. Click the checkbox next to the most appropriate reason(s) for referral (e.g., Physical Fine Motor)
35. Type the details of the reason for referral in the most appropriate fields

Referral

Referral EIP Panel

Referral Additional Information

Provide additional information about developmental concerns. Include any testing that has been completed and child's functioning in one or more developmental areas that may constitute a developmental delay that may establish the child's eligibility for the EIP.

Please check all functional areas that the child is suspected of demonstrating a delay (including relevant comments or note that document attached):

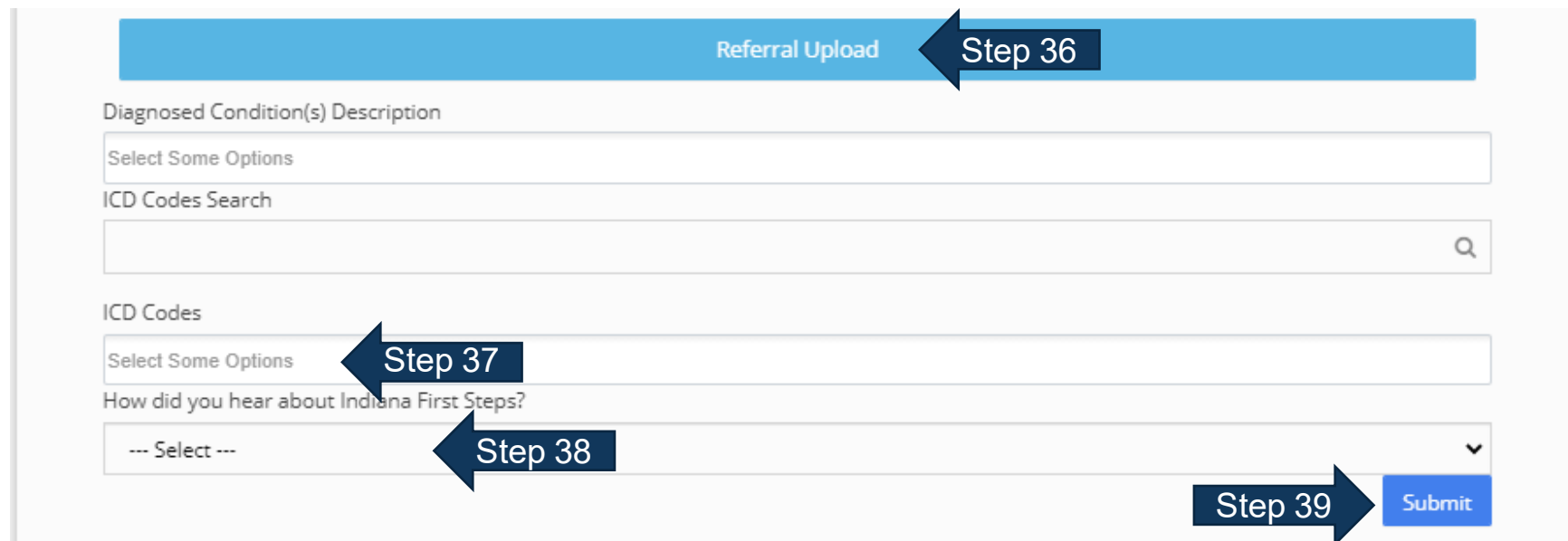
Physical Fine Motor

Physical Fine Motor Details

difficulty holding bottle and bringing food to mouth

Entering a Child's Referral

36. Upload the completed referral form and any additional referral documents
 - Currently, this is the only way to keep referral source contact information with the child's record
37. Enter diagnosis in the "ICD Codes" field if known
38. Select most appropriate response in the "How did you hear about Indiana First Steps?" field if known
39. Select "Submit"



The screenshot shows a web form titled "Referral Upload". At the top, a blue bar contains the text "Referral Upload" and "Step 36" with a left-pointing arrow. Below this are four input fields: "Diagnosed Condition(s) Description" with a dropdown menu showing "Select Some Options"; "ICD Codes Search" with a search bar and a magnifying glass icon; "ICD Codes" with a dropdown menu showing "Select Some Options" and a left-pointing arrow labeled "Step 37"; and "How did you hear about Indiana First Steps?" with a dropdown menu showing "--- Select ---" and a left-pointing arrow labeled "Step 38". At the bottom right, there is a blue "Submit" button with a right-pointing arrow labeled "Step 39".

Viewing the Referral in the Child's Record

40. Navigate to the "Child Info" tab
41. Select the "Referral" panel
42. View the newly entered referral in the grid

The screenshot shows a software interface with a navigation bar at the top containing tabs: "Child at a Glance", "Child Info", "Basic Demographic Info", "Assessment", "Eligibility", "IFSP", "Services", "Transfer, Transition, Exit, Close and Re-Open", and "Child/Family Outcomes Tab". The "Child Info" tab is selected, and a blue arrow labeled "Step 40" points to it. On the left, a sidebar menu lists various panels: "Basic Demographic Info", "Referral", "Child Address", "Child Secondary Languages", "Child Note", "Contact Log", "Child Attributes", and "Initial/Ongoing Service Coordinator". The "Referral" panel is selected, and a blue arrow labeled "Step 41" points to it. The main content area displays a grid with the following data:

Referral Date	Referral Status	Referral Type	Last Name	First Name	Is Name Withheld	
03/05/2021	Open	Primary	Siegenthaler	John	False	Add Edit

Below the grid, it says "Showing 1 to 1 of 1 entries". At the bottom right of the grid, there are navigation buttons: "Prev", "1", and "Next". A search bar and a dropdown menu showing "10" are located at the top right of the grid area.



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For assistance, contact
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877-522-1065



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