PPS Training Demo - Birth to 3 Scripts

Welcome to the Program Participation System or PPS Training Demonstration web cast. Today we will review five scenarios or components of PPS.

1. **Entering** a child into PPS (referral)
2. **Searching** for a child in PPS (add evaluation)
3. **Updating** child's Service Plan
4. **Transition Planning Conference** and **Referral** to your LEA
5. Finally **how to Access Reports** and track your county Indicators

1. <u>Entering a child into PPS (referral)</u>

- Open your Internet Explorer browser and go to the website pps.wisconsin.gov.
    - This will take you to the **Human Services Gateway Page**.
    - Find the **PPS link** and Click on **PPS**
    - You will now see the **PPS Login page**.
    - Enter your **WAMS ID** and **PASSWORD**
    - If you do **<u>NOT</u>** have a WAMS I.D. or Password please view the web cast on how to do so.
    - After entering WAMS ID and password, Click the **login** button.
- Once you have entered your **correct** log-in information and clicked the **login** button you will arrive at the **Program Participation System Home page**.
    - Now, to **Enter a child** into PPS:
        - Find the **Navigation Menu** on the **LEFT** side of the screen
        - Find **Basic Registration** in the navigation menu box
        - Click on **Basic Registration**
- You will see several fields with a **Red Asterisk**. You **MUST** enter all fields with a containing **red asterisk**.

- Lori will enter all the required fields for **Collin Smith** **<u>except gender</u>** to show you what happens
  - Now, Click on **next**.

- A **Red Error** appears saying I need to enter Collin's gender to continue.
  - Lori will enter **gender** and click **next**.
  - All required fields are entered and there is no error message

- The system is now checking if the **child is already known or has been entered into PPS already**… it will return all possible matches for Collin Smith.

  Note: These matches may or may not be children in Birth to 3 since other programs also use PPS. The matches are listed from the likeliest match on top to the least likely towards the bottom.

- Bolded and highlighted red information is **different** from what Lori entered on the previous page.

- You can see Collin Smith is exactly the same **<u>except</u>** for the middle initial.

- For our demonstration, Lori will create a new record by clicking '**Create new Individual'** button at the bottom of page…then select **next.**
  - When you select **NEXT** a yellow message (**MAY**) appears asking you to confirm if this is what you want to do, if it is
  - Click Create New Individual
  - And Click **Next**

- This takes you to the **Individual Summary page**
  - You can now add specific Birth to 3 information about Collin.
  - You can see the **Individual Summary page** provides Collin's **Basic information** that Lori previously entered
  - and the button "**what would you like to do?"** allows you to **update** basic information

- Now we will demonstrate the process of **completing the child and referral information** and **enroll** Collin Smith into B-3.

- Lori will click ‘**Add’** at the top right corner of the ‘Birth to Three Program’ section. This will open the ‘**Child and Referral to Birth to 3 Information’** page.

- This page will allow you to enter (***Lori will NOT enter info)***

    - **Child's Parent or Legal Guardian information**

    - **Residential Address**

    - **Mailing Addresses** *-if different from child’s parent info*

    - **Child's Race** and

    - **Ethnicity**

- This page will **also** allow you to enter

    - **Referral Source** and

    - **County of Responsibility** information

- **AGAIN, required** fields are those with a **red asterisk**.

- Lori will enter

    - Child’s **Parent or Legal Guardian**

    - **Residential Address**

    - And **all** other required fields on this page.

        - To save this information you **must** click **‘Return**’

        - When you Click **Return**, your information will be saved and it will take you back to the **Individual Summary Page**

        - You now see that Collin Smith has been enrolled in Birth to 3.

        - Also note that his status is “**Referred to B-3**”**.**

- Note that “**Which screen would you like to view/edit?**’ is displayed below the ‘Birth to 3’ section. We will be showing you more about this in a moment.

2. <u>Searching for a child in PPS OR add Screening & Evaluation information</u>

We will demonstrate how to find or locate a child in PPS through the "search" option.

- To search for a child you will select the **Search link** on the left side of the navigation menu.

- This will bring you to a **Search Criteria** page.

- You can search by a **Child's Name, Social Security Number** or **Other Demographics**

    - Lori will enter **Collin** and click **Go**. This begins the search

    - A search results page returns along with a list of potential matches based on the criteria Lori entered.

    - ***Note: The default setting for "search" is "<u>Starts With</u>" In other words, if you enter only a single letter of a child's name or only the first numeral of the SS # there will be a considerably higher number of results SO enter as much identifying info as possible.***

- So, we find a match for Collin Smith.

    - However, you have several matches and must choose which specific child you are searching for.

    - You will do this by clicking on the magnifying glass next to that child.

        - In this case, we are **looking** for the **Collin Smith with DOB 11-01-2005 with NO middle name.**

        - Click the magnifying glass next to the correct child

    - This will take you back to the **Individual Summary** page.

    - From this page, you may go to any B-3 page within PPS

      For example Child and Referral / Screening and Evaluation / etc.

- We will now enter **Screening** information for **Collin Smith**….

    - Select '**Screening/Evaluation'** and click '**GO**'.

    - The **Screening/Evaluation** page has three sections -

        - 'Screenings'

    - ‘Evaluations’
    - ‘Client Characteristics’

- Lori will add a **screening** for Collin that occurred on **2/12/06**
- This feature of this system is considered a **“Dynamic List”**
    - This type of list allows you to enter **multiple “events**” of a particular activity. In this case, a single screening is equal to a single event.
- When all the fields are completed click **“Add”** located at the bottom right hand side of the Screening Section.
- You have just added a single “event” or screening for Collin in the dynamic list below.
- You may add more Screening events as they occur, Lori will add another “event”
- Following the screening of Collin your B-3 team decides to “**Recommend an Evaluation**” to determine eligibility…

  By clicking the Pencil Edit button/reopen event

    - Now you must change the “**Recommend Evaluation**” box to **YES** and Click **UPDATE**
    - You MUST be certain the screening date **matches** the date entered in **“Referral or decision to evaluate**”, SO in this case it’s **2/12/06.**
- Now you will add an **Evaluation**. Lori will add evaluation date March 22, 2006 Audiology Eval / YES
    - Click the ‘**Add’** button at the bottom right side below the evaluation field.
    - This will **Add** the record to the Evaluations Dynamic list below.
    - Just like screenings you may add additional Evaluations as they occur.

When you begin entering **Services** on the next page you MUST have an evaluation that reflects the child is eligible.

- Now, let’s add details for **child characteristics**
    - Communication delay
    - Hard of hearing
- You MUST click ‘**Return’** on the page to save your information

- This will take you back to the **Individual Summary Page.**

3. Updating Child's Service Plan

- Now Lori is going to add **service-planning details** for Collin.
- Lori will select **'Service Planning'** and click the **'Go'**.
- This will open the **Service Planning** page.
- As you can see, this page has **four sections** i.e.
    - 'Initial IFSP Date'
    - 'Baseline Assessment Information'
    - 'Services' and
    - 'Additional Assessment'
        - ***Again, the* minimum *fields are those with a red asterisk, you MUST enter these fields before you continue forward.***
- Lori will enter **'Initial IFSP Date'**.
- You will add the **initial IFSP** date of May 1, 2006
    - You find that it is **past the 45 day** expected timeline
    - Now you **MUST** enter a reason code from the drop down menu**.**
    - Lori selected **"systems"** reason, which will unfortunately put Lori out of compliance with Indicator 7.

In the **Baseline Assessment Section**,

- You enter **Child Outcome information**
- Use the **drop down menu** to complete the **outcome ratings** for Collin.
- AND then do not forget **Sources of Information**
    - This Captures the methods used to complete the assessment.
    - Each section is an **Expandable** menu and remains out of view until it's triggered by clicking on '**Sources of Information'.**

- This opens up a section with 3 horizontally divided tabs on the left, they are

    - Socio-Emotional Skills
    - Knowledge and skills
    - Appropriate Actions

  Check boxes on the right side to document the tools used to rate Collin.

- You can see gray shading on both the right and left side of this section.

  I will select Socio-Emotional Skills and choose my "**sources of information**" from the list provided on the right. I will put a check mark in each box that corresponds with how information was gathered In this case, **'Parent Interview"**

- You will also do this for the other 2 remaining tabs

    - Knowledge and Skills
    - Appropriate Actions.

- As you click on the **Knowledge and Skills** section, the gray shading moves to the middle section on the left.
- Now you will complete entering **Sources of Information** details.
- If we don't want it to take up so much space we can re-collapse it and it summarizes the choices we have made.

Let's move on to the **'Services'** section

- Lori will Enter the following details to start services for Collin Smith.

    - IFSP date that that added all the services
    - Add **Assistive Technology**.
    - Service Provider
    - Location
    - Service Start Date
    - Click Add

- Here, too, Lori will be putting the service start date as **over 30 days** after the IFSP date.

- When Lori tries to enter the service by clicking ADD, Lori will see the prompt: **“Reason for late start must be entered**…”

- So, in the field Lori will enter **“IFSP team determined that a service should begin after the 30 day timeline**”.

- I chose this because it was decided that some augmentative communication devices would be tried several months into the future, after the speech pathologist saw how the child responded to a cochlear implant.

- Clicking ‘**Add’** Button at the bottom right side, below the **Services** field adds this to the dynamic list.

- We can add more Service records if necessary and modify them by using these buttons and icons to the right.

- ***Don’t forget to add Service Coordination as one of the services.***

- Clicking the **‘Return’** Button saves the **Service Planning information**.

- This will take you back to the **Individual Summary Page**.

NOTE the Birth to 3 Status has now **changed to ‘Receiving Services’** and will change again once we transition this child to a school district.

4. Now, we go on to **Transition Planning Conference /Referral to LEA**

- On Individual Summary Page, under ‘**Which screen would you like to view/edit?**’
  - Lori will select the ‘**Transition / Program Exit’** option
  - And Click ‘GO’ button.
  - The ‘**Transition / Program Exit’** page will appear.
- As you can see, this page has several sections such as
  - ‘LEA Information’
  - ‘Notification’
  - ‘Transition Planning Conference (TPC)’

- ‘Refer to LEA’
- ’Program Exit’ and
- ‘Child Outcome Information’

Let me give a brief overview of these sections.

<u>LEA Information:</u>

We assign the child to one of the available Local Education Agencies using this section. The LEA information has to be filled out **before** sending an‘LEA" Notification’ or ‘Referral to the LEA’.

<u>Notification:</u>

- This section helps us to send **electronic ‘Notification’** to the assigned Local Education Agency.
- If notification has already been sent, then the fields ‘**Last Sent Date’ & ‘Last Notified LEA’** will be already be populated when the page comes up.
- The ‘**Populate with last Notification details’** button is used to load the other details of the most recent notification sent to the LEA for the child.

<u>Transition Planning Conference (TPC):</u>

- This section allows the user to record **Transition Planning Conference** details for a child.
- The important thing to remember is that **TPC details must be completed before sending a ‘Referral’**.
- Let’s enter **6/10/2008** as the date when the LEA was invited and **10/1/2008** as the date which the TPC actually occurred.
- When we click Return at the bottom of the page we will be asked to provide a reason it didn’t occur more than 90 days before Collin Smith turned 3 in November.
- Let’s choose “<u>Birth to 3 did not start transition process in timely manner”</u> which will put us **out of compliance on Indicator 8C**. However, if the family did not provide timely consent, we could choose that reason.

Refer to LEA:

- This section helps us to Document that an electronic (or Manual) referral was sent.
- If a referral has already been sent, then the fields '**Last Sent Date' & 'Last Referred LEA'** will be completed when the page opens.
- The '**Populate with last Referral details'** button is used to load the other details of the most recent referral sent to the LEA.
- The '**Referral Type'** drop down menu will indicate the type of referral sent.
- For '**Manual Referral**'**—**a referral sent via a **mailed paper referral**, the email address fields are disabled since no email has been sent.
- For 'Electronic Referral' the '**Referral Sent Date' has to be a current** date.
- Exept for:
    - 1. Comments
    - 2. Parent did not provide timely consent
    - 3. Child was referred to Bto3 after age 2 years, 9 months' check box,
    - ALL other fields are required to be filled in this section in order to send a referral.

Program Exit

This section captures the **Exit information** of a child.

- You will verify that **transition steps were recorded** on the IFSP
- **AND the date** the transition steps were documented on the IFSP

NOTE: once the closing date is entered, the case is considered "closed" and all the Birth to Three pages becomes view/read only.

Child Outcome Information:

This section is used to capture the **Exit child outcome** information of the child when he/she leaves the program.

Referral Process

- Now let’s send a referral to the LEA.

    - Before sending a referral to the LEA, you need to enter details about the **Transition Planning Conference** and complete the necessary details in the **‘Refer to LEA**’ section.

    - It is also very important to **verify the parent’s contact information** (address and phone numbers) is up to date so the LEA receives accurate information.

In our demonstration, we added the **Transition Planning Conference** (TPC) and know the parental contact information is correct.

So, Lori will enter the details for a referral and click **‘Send / Save Referral’** button in the ‘**Refer to LEA’** section on the page.

- You will be asked to **verify** that you want to send the referral by clicking the ‘Send/Save Referral’ button again.

- An electronic referral (i.e. an email) will be sent to the LEA.

- As you notice, the page is reloaded with informational messages i.e.

    - Electronic Referral to LEA sent successfully.

    - Please send manual packet to the LEA’.

We have now completed the process of sending an electronic referral for Collin Smith.

Now click the ‘**Return**’ button on the bottom of the **‘Transition / Program Exit’** page which will take you back to the Individual Summary Page.

You can see the Birth to 3 Status has now **changed to ‘Transitioned to LEA’**.

5. Accessing Reports

- Now Lori will demonstrate how you access reports.

- There are a couple of reports available to Birth to Three agencies.

    - Going to the '**Reports'** link on the left navigation menu.

    - You will see a **list of reports** you can utilize.

- Lori will select the first report listed **– Birthto3 Enrolled Children list**.

  This report shows children currently receiving services through the program. Lori will enter **July 1, 2007** through **June 30, 2008** for a year end count and click **NEXT**. If Lori enters **October 1, 2008** through **October 1, 2008**, this would give you a one-day count.

    - The page will refresh with a link to the report right underneath the criteria I've entered.
    - Clicking the **magnifying glass** will open the report in PDF format in a new window, from which I can scroll, print it, or save as necessary.
    - To leave the report, close it using the X in the top right corner.

- Let's talk about the uses of the **Transition/Indicator 8 report**.

    - To access this report, click on **Reports** on the Left Navigation Menu and then locate the B-3 Transition Report.
    - For this report, the date entered determines what the information can tell you.
    - I could put in July 1, 2007 to get a list of all the activities that happened this past FFY from July 1, 2007 through June 30, 2008 for any child who turned three within that time period OR
    - I could put in today's date and get a list of the children who will turn 3 within the next year so I can plan accordingly.