This document is intended to assist individuals transferring child record information from paper copy to electronic record on the web SPOE system. The format allows for an individual to look at the web SPOE **CHILD** tab, choose Child Detail section, and know where to look in the paper file to gather the necessary information, and so forth.

Web System Assistance Tool: (Parentheses = location of information in common docs)

- **CHILD**
  - Child Detail
    - Child demographics ***(Combined Enrollment Form)***
    - Initial Parental Consent for Eval/Assess ***(Notice of Action/ Consent for Initial Eval/Assess)***
    - Important dates ***(DOB, Referral Date, Elig Date - Eligibility Determination Doc) (Initial IFSP date – Initial IFSP)***
    - Service Coordination List ***(Intake – Referral Form, Ongoing – Page 2 of Initial IFSP)***
  - Enrollment
    - General enrollment information ***(Referral Form, Change of Information/Inactivation Form)***
  - Family Members
    - Family member and child detail ***(Page 2 of Combined Enrollment Form)***
    - Head of Household & other family member ***(Page 2 of Combined Enrollment Form)***
  - Health Plans
    - Insurance, Medicaid, MC+ ***(Page 3 of Combined Enrollment Form)***
  - Social History
    - Social history topic / Health tab ***(Social History, Medical Records, Health Summary)***
- **HEALTH**
  - Current Health
    - Concerns/Illnesses, Hospitalization/Surgeries ***(Medical records, Health Summary, Eligibility Determination Doc, Social History)***
  - Medication/Equipment/Supply ***(Page 3 of Social History, Medical records)***
  - Immunizations ***(Medical records, Health Summary)***
  - Physician ***(Page 2 of Social History, Page 2 of IFSP, Bottom of Health Summary)***
  - Neonatal Information regarding birth ***(Pages 6-8 of Social History, Medical records)***
  - Diagnosis ***(Medical records, Eligibility Determination Doc, Health Summary)***
- **DOMAINS**
  - Domains
    - Domain Eval/Assess info ***(Current evaluation / assessment reports)***
    - Domain Summary Report ***(Pages 4 & 5 of Social History)***
  - Development
    - Developmental Milestones ***(Pages 4 & 5 of Social History, Evaluation/Assessment reports, Screenings, Page 3 of IFSP)***
- **ELIGIBILITY**
  - Eligibility Determination ***(Eligibility Determination Doc)***
  - Eligibility Source ***(Eligibility Determination Doc)***
  - Eligibility Authorizations ***(Authorization for Team meeting/ Evaluation-Assessment form)***
  - Eligibility Notes ***(Case notes, Health Summary)***

- **TEAM MEETINGS**
  - Meeting History
    - All tentative, scheduled, ongoing and finalized meetings ***(Meeting Notification, Case notes, Pages 1 & 6 of IFSP)***
  - Meeting Planner
    - Info for IFSP meetings ***(Case notes, Meeting Notification, IFSP planning worksheet)***
    - Schedule/reschedule a meeting ***(Case notes, Meeting notification)***
    - Team Meeting Members ***(Page 11 of IFSP, Case notes)***
  - Meeting Activities
    - Attendance ***(Page 11 of IFSP, Case notes)***
    - IFSP Specifications ***(Pages 1 & 6 of IFSP)***
    - Review Family Assessment ***(Page 4 of IFSP)***
    - Team Summary of Present Level ***(Page 3 of IFSP)***
    - New Outcome or Review Existing Outcomes ***(Page 5 of IFSP, duplicated as needed)***
    - Parental Consent for IFSP Services ***(Notice of Action/Consent for EI Services)***
    - IFSP Authorizations or Other Services ***(Pages 6, 7, & 9 of IFSP)***
    - Meeting Notes ***(Case notes)***
    - Transition Information ***(Page 10 of IFSP)***
    - Team Communications ***(bottom of Page 11 of IFSP)***
    - Next Meeting ***(bottom of Page 11 of IFSP, case notes)***
    - Delivered Services Review ***(Not in common docs)***
    - Finalize Meeting ***(Not in common docs)***
  - Team Members ***(Page 11 of IFSP, Case notes, Meeting notification)***

- **IFSP**
  - Present Level ***(Page 3 of IFSP)***
  - Family Assessment ***(Page 4 of IFSP)***
  - Outcomes ***(Page 5 of IFSP, duplicated as needed)***
  - Authorizations ***(Pages 6 & 7 of IFSP)***
  - Other Services ***(Page 9 of IFSP)***
  - Transition
    - Transition 'Into' and 'Within' Topic ***(Top of Page 10 of IFSP)***
    - Transition 'From' Topic ***(Bottom of Page 10 of IFSP)***

- **NOTES**
  - Case Notes ***(Case notes)***
  - Provider Progress Notes ***(Provider Monthly Progress notes)***
  - Compliance Notes
    - View/Add note for reason for exceeding 45-day timelines ***(Case notes)***
    - View/Add Access Log notes ***(Access Log)***
  - E-Access
    - Links to E-Access Summary and Detail Reports ***(Not in common docs)***

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