Plan Reference Guide

Office of Child Development and Early Learning (OCDEL)

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Reference Guide Overview

PELICAN EI is a web-enabled information system that serves as the information system for the Bureau of Early Intervention Services (BEIS). This guide is an on-the-job reference to screens associated with the Plan module in PELICAN EI. This reference guide is targeted to the following user roles:

- SC Supervisor
- SC
- SC Data Entry
- Provider Contributor

The purpose of this reference guide is to give you additional information for a particular set of screens in PELICAN EI and is not intended to be a step-by-step guide. Included in this guide is an overview of the module and the screen name, brief description, and list of the "Important Things to Know" about each screen within the module.

This reference guide has been divided into the following five sections:

I. Create Initial Plan
II. Update Service Actual Delivery Date
III. Update Transition Plan Dates
IV. View Plan History and Print Plan
V. Perform a Revision
VI. Common Revisions
VII. Re-activate a Plan

For more information on additional training resources for the Plan functionality, please see the **Additional Resources** section below.

Additional Resources

In addition to this reference guide, users should use the following resources for help:

- On-Line Help within PELICAN EI
- HCSIS Learning Management System (LMS)
- HCSIS Help Desk

On-Line Help
On-line help is available for each screen in PELICAN EI and includes both screen and field-level descriptions. To access this information, click **Help** in the upper-right corner of PELICAN EI.
HCSIS LMS
The following materials on the Plan functionality are available on the LMS: • Plan Captivate • Plan Reference Guide • Plan Field Lengths • Evaluation & Plan Save -Finalize-Modify Tip Sheet **Note:** Please contact your local BP Administrator for LMS Access. Your BP Administrator can assign you an LMS ID and password so you have access to all the training materials and courses for PELICAN EI.
HCSIS Help Desk
The HCSIS Help Desk operates Monday through Friday from 8 AM to 5 PM. Users can contact the HCSIS Help Desk via phone, fax, and email. Contact details for the HCSIS Help Desk are listed below: • Phone: 1-866-444-1264 • Fax: 1-717-540-0960 • E-mail: c-hhcsishd@pa.gov

Overview of Plan

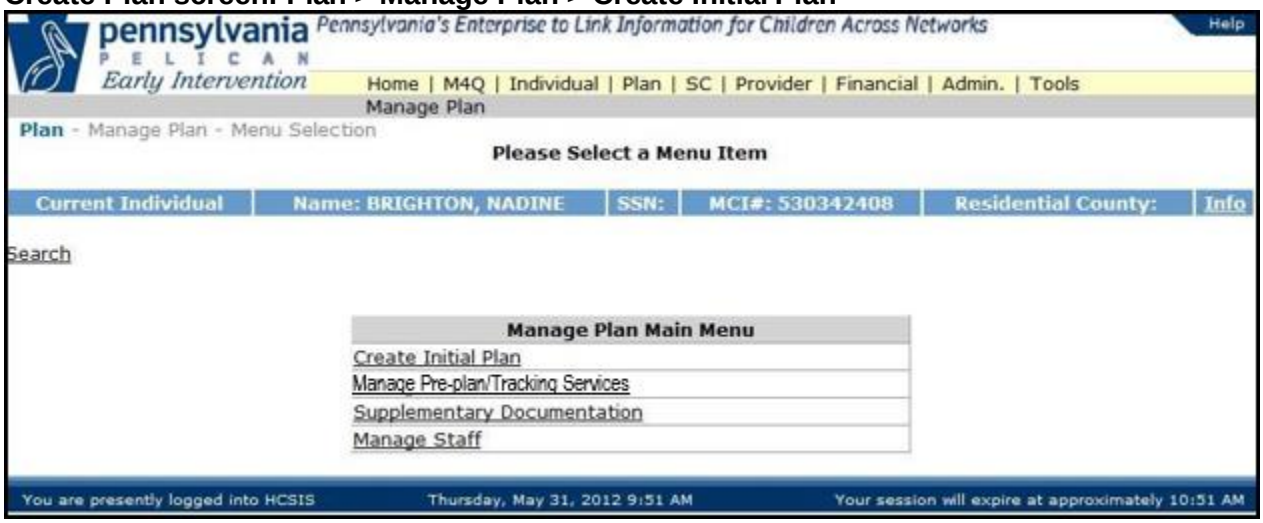
Once the initial plan meeting has been held, the SC or SC Supervisor should begin to enter the child's plan information into PELICAN EI. An explanation is required for all plans that are created more than 45 days from the referral date. The SC or SC Supervisor must also provide reasons for services that do not start within 14 calendar days of the service start date indicated on the child's plan. Each service on a plan must be associated with at least one outcome/goal and services must be associated with a provider that will render the service (the provider can be associated after a plan is approved, if needed). When the child's plan is complete, the SC or SC Supervisor submits and approves it in order for the County Financial Manager to authorize services and permit provider billing. SC and SC Supervisors can update a plan throughout the year, including adding information about a child's transition plan. An explanation is required for transition plans that are created less than 90 days before a child's third birthday. A plan can be printed at any time, whether the plan is in draft status or approved.

The plan module is comprised of multiple hyperlinked pages that pull from several different screens in PELICAN EI, each of which combine together to create the printable Individualized Family Service Plan (IFSP). It is important to note that there are very few dependencies within the Plan module. As a result, users are free to enter information in any order that makes the most sense to them. Ultimately, what is most important is that all of the information needed to complete the IFSP is entered into PELICAN EI prior to submission.

Manage Plan Main Menu

The **Manage Plan Main Menu** contains links that allow you to perform tasks related to creating and maintaining a child's plan. As plans are created, finalized and revised, the links on the menu change to reflect available tasks.

Create Plan screen: Plan > Manage Plan > Create Initial Plan



Above is the **Manage Plan Main Menu** screen for a child who does not yet have a plan. You can use this screen to create a child's initial plan and access screens useful for plan-related tasks, like adding supplemental documentation or entering evaluation services.

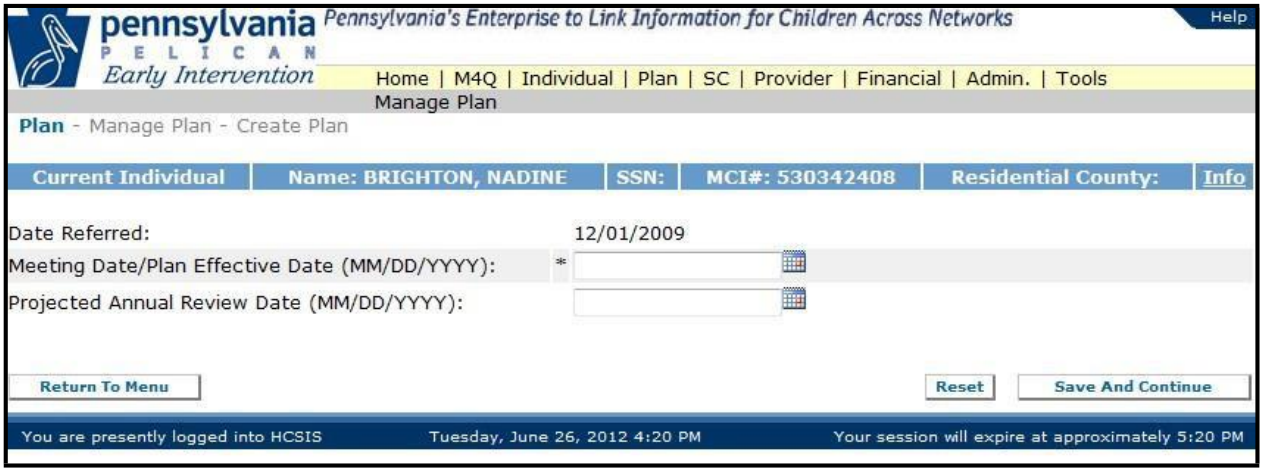
Additional Things to Know:

- Click the Create Initial Plan link to begin a draft IFSP for a child. Refer to the "Create Initial Plan" section of this document for more information.
- Click the Manage Pre-plan/Tracking Services link to access the **Manage Pre-plan/Tracking** screen, where you can select Evaluation and "IFSP Teaming" services. Refer to the **Evaluation Reference Guide** for more information.
    - Use IFSP Teaming services to capture team meetings spent discussing the child's Individualized Family Service Plan (IFSP) with the family. This service can be used when an interdisciplinary team meets for 30 minutes or more.
      Note: While these meetings would typically represent conferring about the child's IFSP, these services are listed on the **Manage Pre-plan/Tracking Services** screen so they can be added at any time and do not print on the IFSP.
- Click the Supplementary Documentation link to access the **Supplementary Documentation** screen, where you can record any paper documentation relating to the child's involvement with the EI program. Refer to the **Eligibility Reference Guide** for more information.

Create Initial Plan

This activity will only be performed one time for a child who does not currently have a plan recorded in PELICAN EI. Users should navigate to the *Manage Plan* screen and select the Create Initial Plan link.

Create Plan screen: Plan > Manage Plan > Create Initial Plan



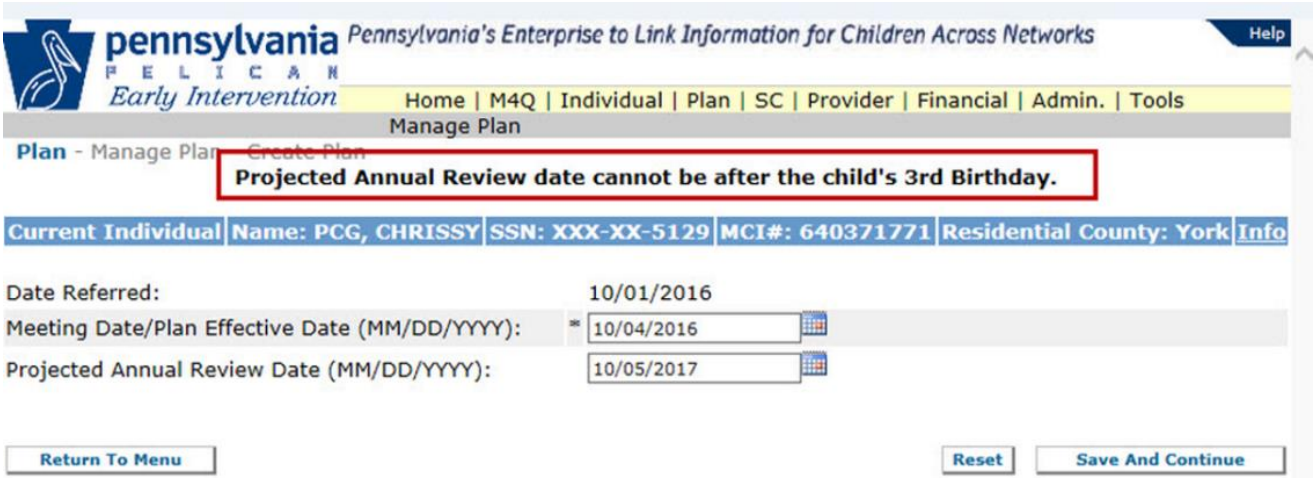
Above is the **Create Plan** screen. This screen is used to capture the **Plan Effective Date** and **Projected Annual Review Date**.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- A **Referral Date** is required before creating a child's initial plan. If no referral date exists in PELICAN EI, the user must navigate to the **Referral** screen within the Individual module and enter the child's referral date
- The **Meeting Date/Plan Effective Date** entered on this screen will be the date that the system uses to calculate the child's **Projected Annual Review Date** (364 days after the creation of the child's initial plan)
- If the child's third birthday comes before the 364 day timeframe, enter the day before the child's 3rd birthday as the **Projected Annual Review Date**
- The **Projected Annual Review Date** will appear in the blue information bar at the top of the screen when updating/viewing a plan for a child
- The edited Projected Annual Review Date must fall on/after the "Date Outcome Developed" that currently is saved to an IFSP/IEP in the Outcome/Goal section, otherwise a validation message will alert the user:

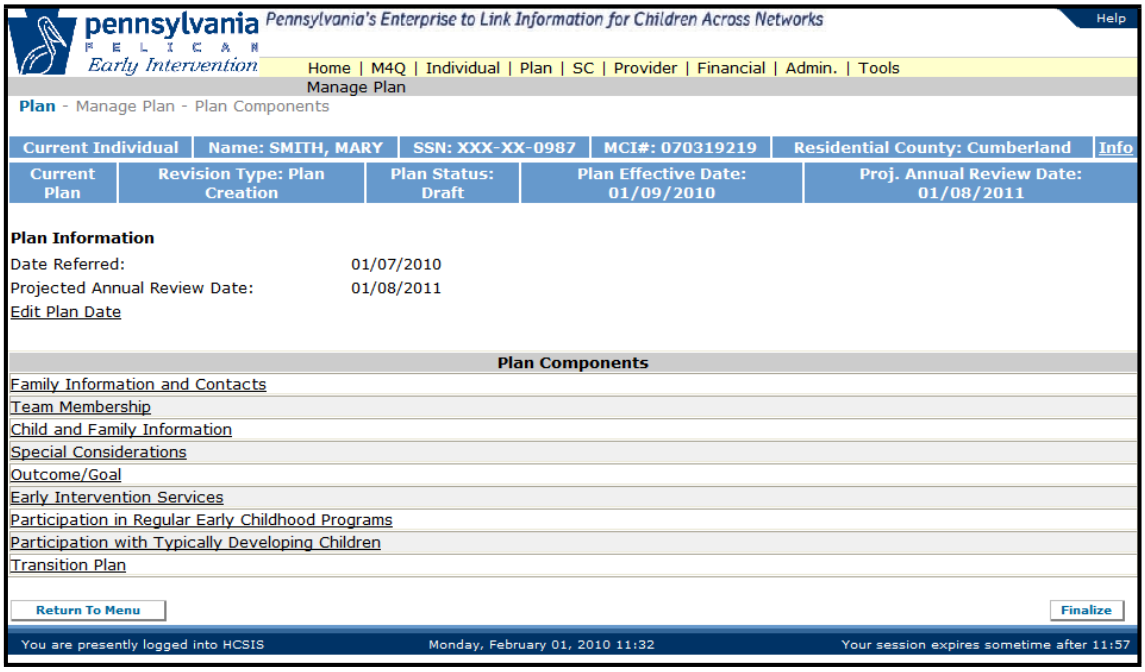
  "Projected Annual Review Date must be on or after any outcome/goal date."

- The Projected Annual Review date cannot be after a child's third birthday. If attempting to extend the Annual Review Date, HCSIS will validate if the new Annual Review Date falls after the child's third birthday. If it falls after the child's third birthday, users will receive the following validation message:



- Users with the Provider Contributor role cannot create a plan

Plan Components Screen: Plan > Manage Plan > View/Modify Plan Details



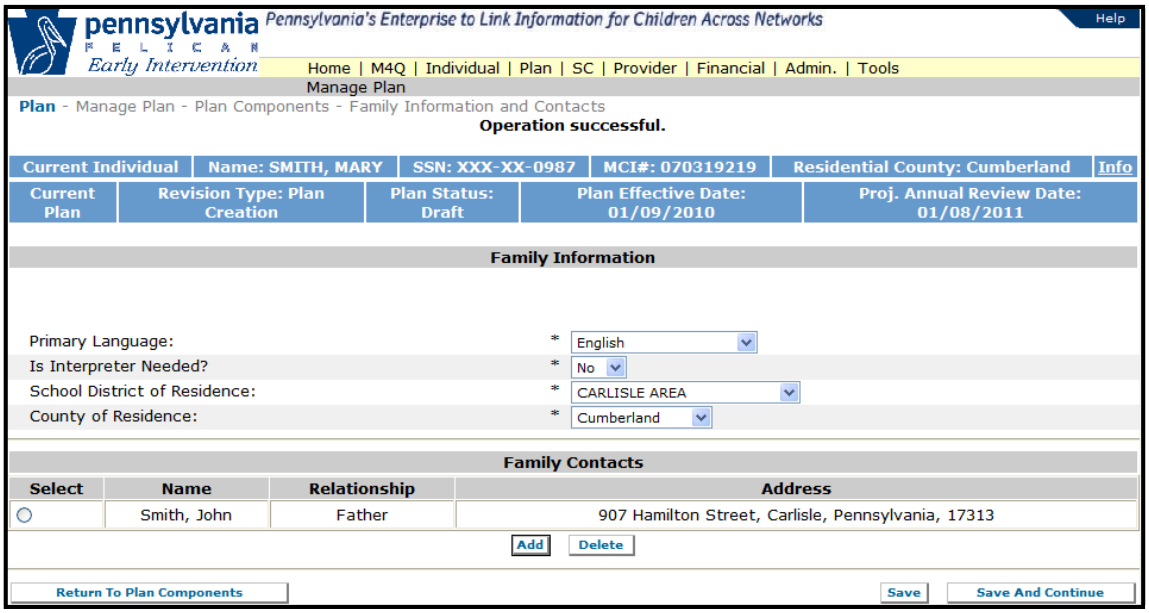
Above is the **Plan Components** screen. This screen serves as a portal to access all the sections of a child's plan. This screen will appear after a user clicks [Save and Continue] on the **Create Plan** screen.

<u>Additional Things to Know:</u>

- Users can edit the **Plan Effective Date** by clicking the <u>Edit Plan Revision Date</u> link on this screen
- The **Plan Components** can be accessed and completed in any order
- Users do not have to enter **Transition Plan** information during initial plan creation unless child is transition age
- Once a plan is complete, click [Finalize] to approve the child's plan
- For SC Unit Managers only, a [Delete Draft Plan] button appears and can be used to delete a Draft Plan that was created in error. Finalized Plans cannot be deleted
  <u>Note:</u> Deleted Plans cannot be recovered

Family Information and Contacts

Plan > Manage Plan > View/Modify Plan Details > Family Information and Contacts



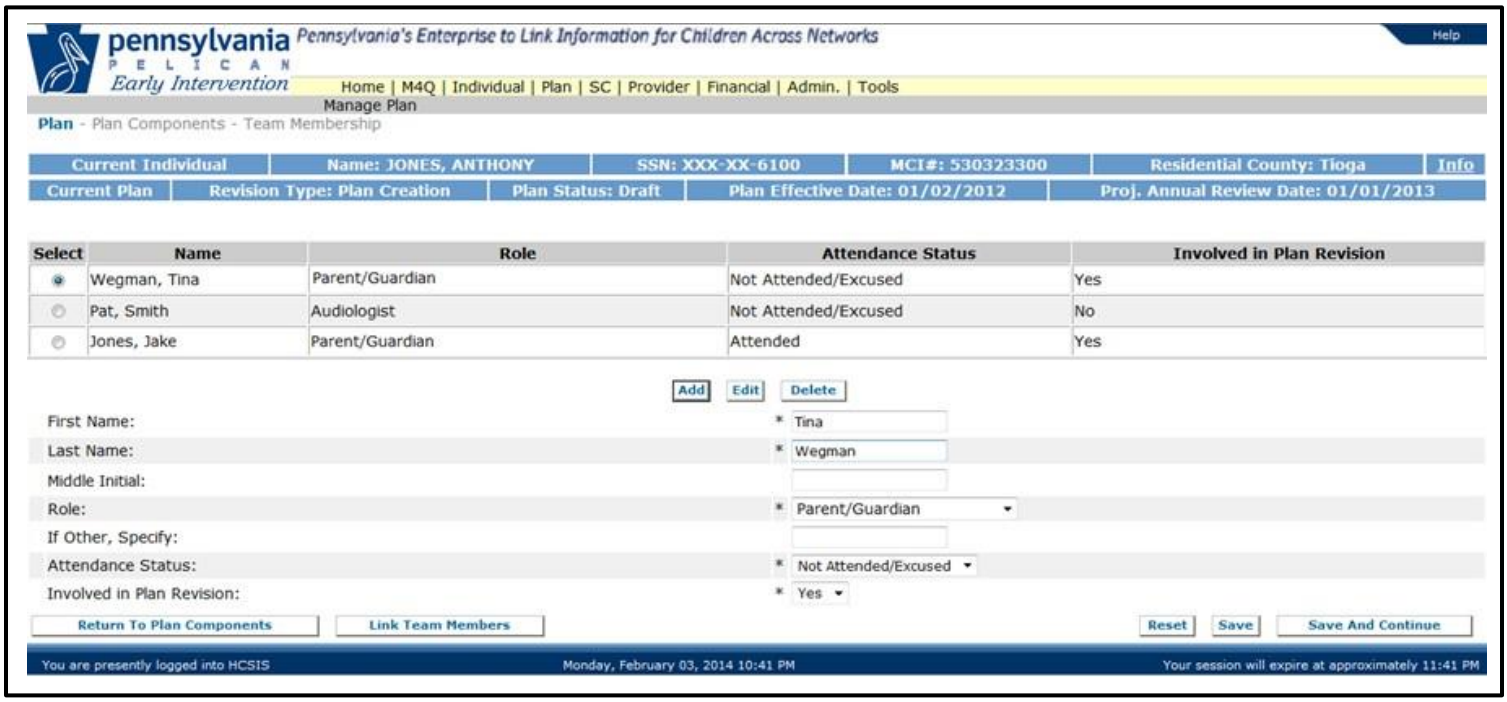
Above is the **Family Information and Contacts** screen. This screen is used to record demographic information about the child's family that will appear on the printed plan.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- Family contacts <u>must</u> be added to the screen by clicking [Add] to be directed to the **Select Family Contacts** screen.
  - Only active family contacts can be linked to the plan
    - 'Active' family contacts are defined as having either no end date or an end date in the future
  - If there were no contacts added to the Demographics **Contacts** screen and the [Add] button is clicked, the following error will display: **There are no contacts available to add. Please add a contact on the Contacts screen in Demographics.**
    - Users must enter at least one active contact in order to finalize the Plan.
- The information entered on this screen will appear on the child's printed plan
- There is no limit to the number of family contacts that can be entered
- Only active family contacts can be linked to the plan
  - 'Active' family contacts are defined as having either no end date or an end date in the future

Team Membership

Plan > Manage Plan > View/Modify Plan Details > Team Membership



Above is the **Team Membership** screen. This screen is used to record the names, roles, and attendance at the child's initial meeting of each member of the child's team.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*).
- The information entered on this screen will appear on the child's printed plan.
- There is no limit to the number of team members that can be entered.
- The [Link Team Members] button generates a pop-up window with the child's contacts, evaluation and plan team members to allow for the user to quickly import the child's team members from other areas of PELICAN EI.
- Please refer to the table below for guidance on data entry into PELICAN EI along with the associated display of team members on the printable plan.
    - Note; The "Involved in Plan Revision" field differentiates between plan team members who were involved in the plan revision for a certain version of the plan, and those team members who were not involved.

PELICAN EI Data Entry		Printable Plan	
Attendance Status	**Involved in Plan Revision**	**IFSP/IEP TEAM MEMBERSHIP section of the Printable Plan**	**Revisions to the IFSP/IEP section of the Printable Plan**
Attended	Yes	Yes	Yes
Not Attended/Excused	Yes	Yes	Yes
Not Attended/Excused	No	Yes **Note:** These members remain part of the team	No **Note:** These team members did NOT participate in the revision

Child and Family Information

Plan > Manage Plan > View/Modify Plan Details > Child and Family Information

pennsylvania PELICAN Early Intervention — Pennsylvania's Enterprise to Link Information for Children Across Networks — Help

Home | M4Q | Individual | Plan | SC | Provider | Financial | Admin. | Tools

Manage Plan

Plan - Manage Plan - Plan Components - Child and Family Information

Current Individual	Name: PEARSON, TYLER	SSN: XXX-XX-4438	MCI#: 530324619	Residential County: Westmoreland	Info

Current Plan	Revision Type: Other Update	Plan Status: Draft	Plan Effective Date: 09/01/2011	Proj. Annual Review Date: 08/31/2012

Summary of the Child's Present Performance

Provide a summary from the Evaluation Report if current or update with current information *

Tyler wakes up in the morning and is placed in his adaptive high chair. He will not use a fork or spoon when eating his meals. Tyler does not attend daycare at the present time.

49821 characters remaining

Summary of Family Information

Provide a summary from the Evaluation Report if current or update with current information *

Tyler is unable to roam around because of his surroundings. He also can not communicate well with his parents and only moans and screams if he is in need of something.

3832 characters remaining

What assistance will be provided to the family in order to help them access community, medical or other non-early intervention services? *

4000 characters remaining

Which of the following outreach activities has any member of the household received in the last year?

Adult Education
Assist in Identifying Health Care
Assist in Obtaining Health Insurance
Assist Families of Incarcerated Indiv.

How often do the members of the household read to the child?

How many children's books are in the home (may include library books)?

Return To Plan Components | Populate From ER | Check Spelling | Reset | Save | Save And Continue

You are presently logged into HCSIS — Wednesday, September 15, 2010 2:31 PM — Your session will expire at approximately 3:31 PM

Above is the **Child and Family Information** screen. A user should complete this screen based on the child and family's present performance and activities.

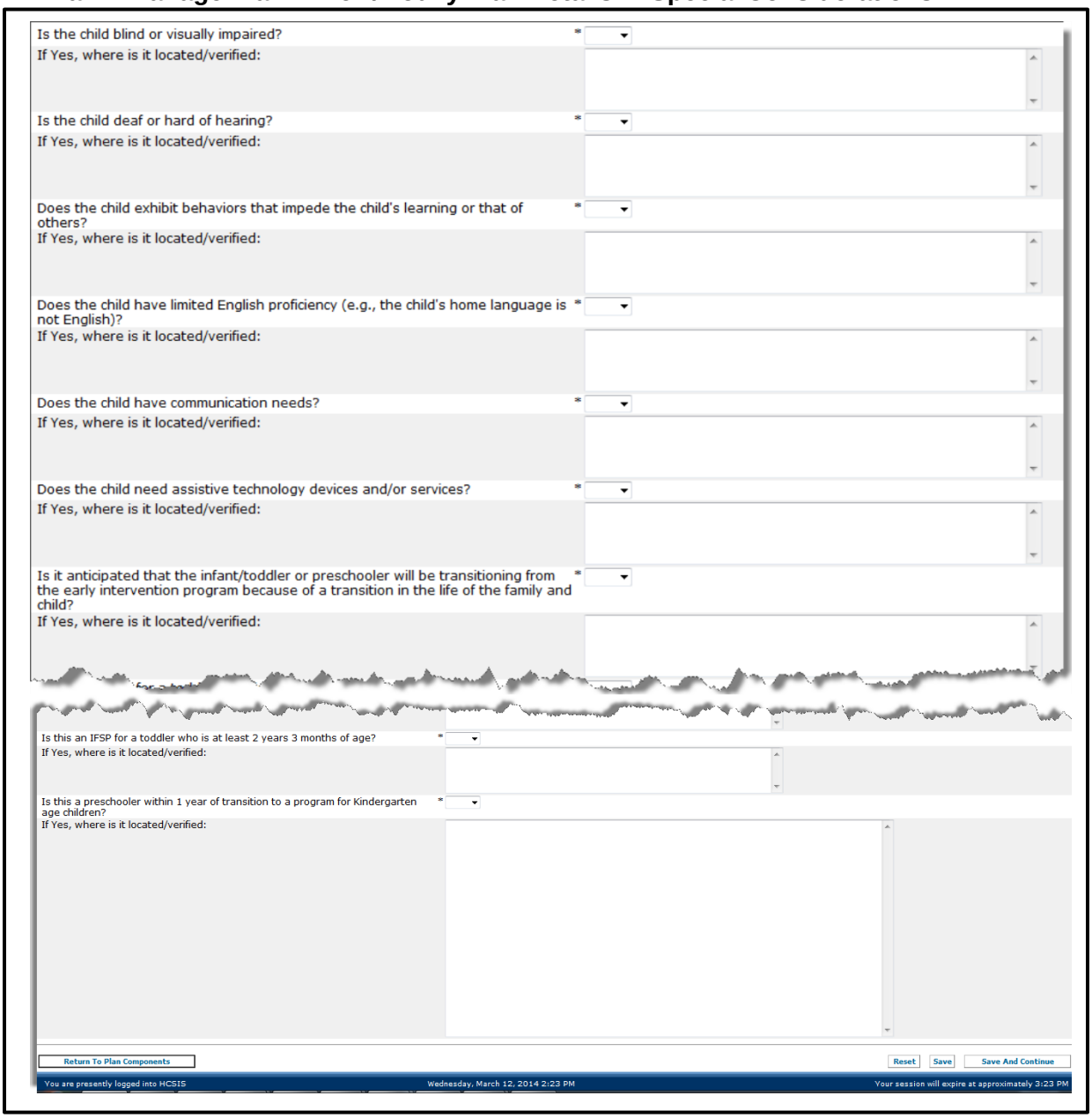
Continued on the next page.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*).
- The [Populate from ER] button pulls information from the **Evaluation Report** as follows:
  - The Summary of Child's Present Performance text box is populated with the following information from the child's ER:
    - **Family Assessment** screen – Describe activities that are challenging for the child… text box
    - **Family Assessment** screen – Describe the family's views of their child's strengths and concerns… text box
  - The Summary of Family Information - Provide a summary from the Evaluation Report... text box is populated with information from the child's ER:
    - **Family Assessment** screen – Describe the child's and family's typical day… text box
  - The Summary of Family Information – What assistance will be provided… text box is populated with information from the child's ER:
    - **Recommendation** screen - Are there referrals or linkages… text box

Special Considerations

Plan > Manage Plan > View/Modify Plan Details > Special Considerations

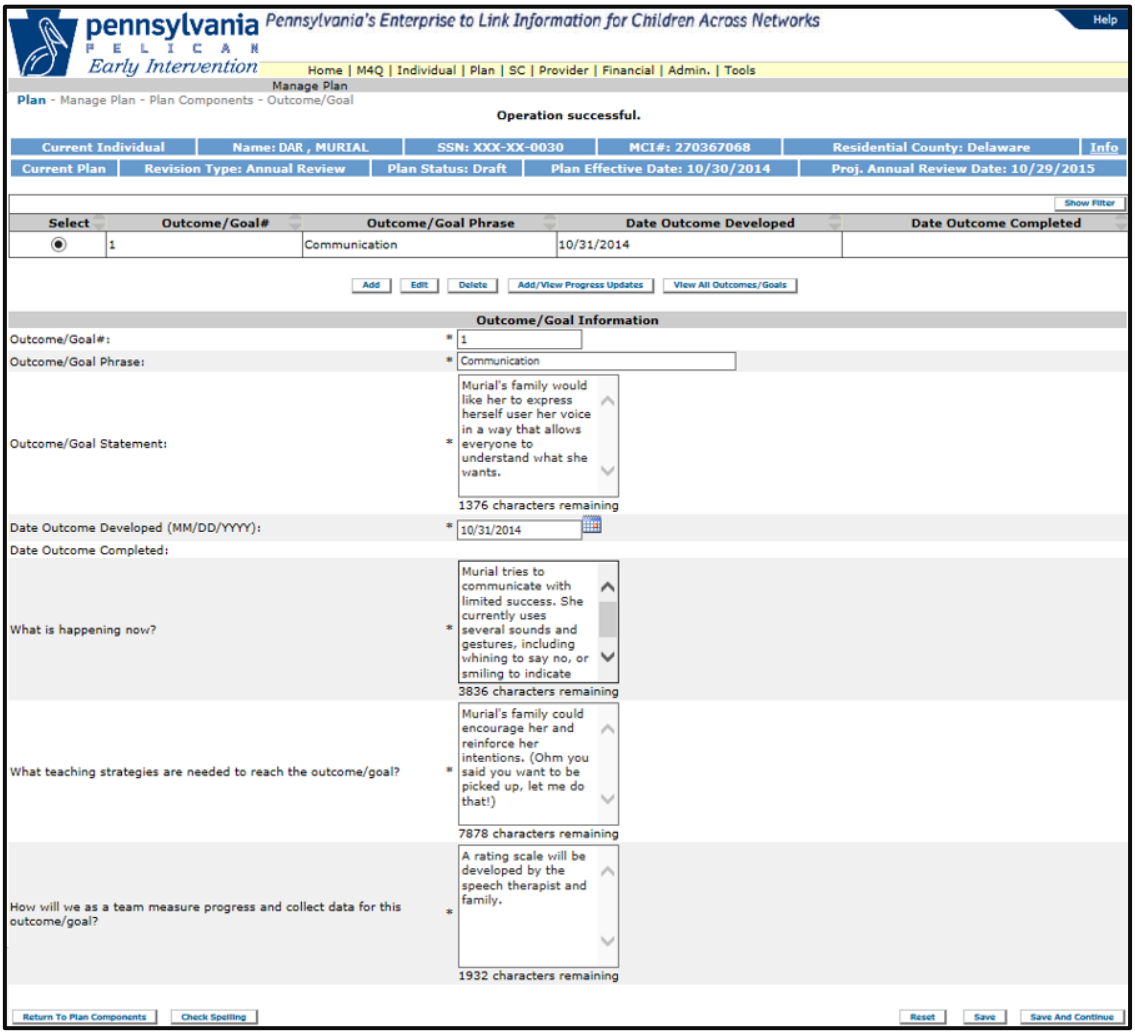


Above is the **Special Considerations** screen. A user should complete this screen to identify any special factors that may affect the child's needs.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- If **Yes** is selected for a question, the **If Yes, give details** text box becomes mandatory and users should feel free to enter information referring reader's to other parts of the child's plan, if applicable.
- The text entered in the text boxes will appear on the child's printed plan

Outcome/Goal



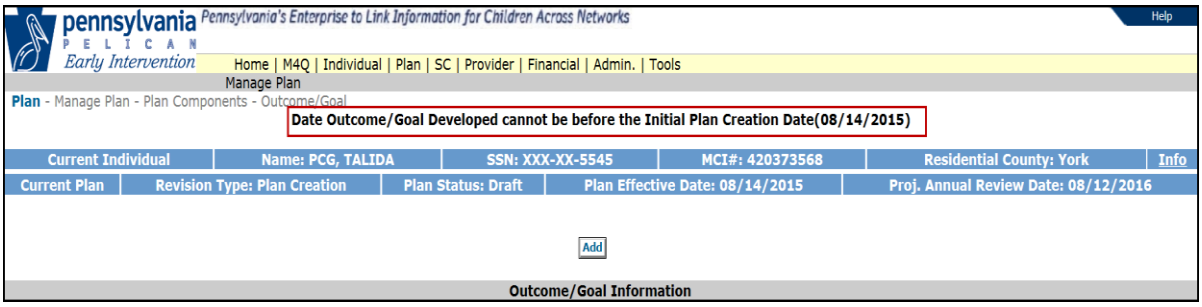
Above is the Outcome/Goal screen. This screen captures the activities and skills that the child's team would like to see happen during the plan year. A user should record goals for the child using this screen

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- There is no limit on the number of outcomes/goals that can be recorded in the system for a child
- Each outcome/goal must have an **Outcome/Goal Phrase** to easily identify it – these phrases will not be printed on the plan
- Each **Outcome/Goal Phrase** entered on this screen will be used to populate the **Outcome/Goal Phrases** on the **Early Intervention Services** screen
- Outcome/Goal Phrases must be created in order for services to be added to a child's plan
- Outcome/Goals should never be deleted unless the information was entered in error. If the Outcome/Goal has been met or is no longer valid, use the [Add/View Progress Updates] functionality to end-date the Outcome/Goal.

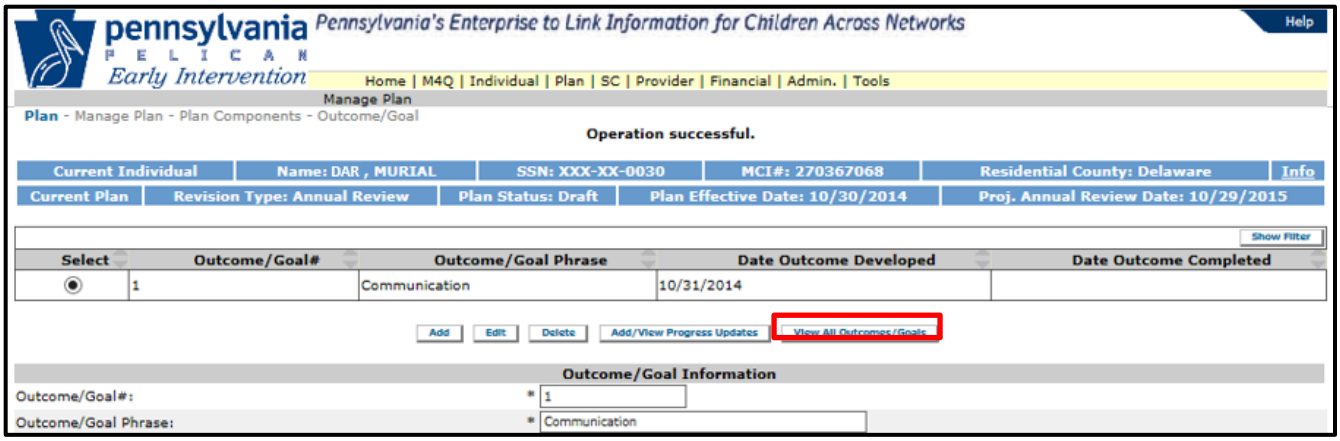
- When a user modifies an outcome/goal which has a Date Outcome Developed that falls before the new Initial Plan Creation Date, the user will receive the following validation message:

  Date Outcome/Goal Developed cannot be before the Initial Plan Creation Date

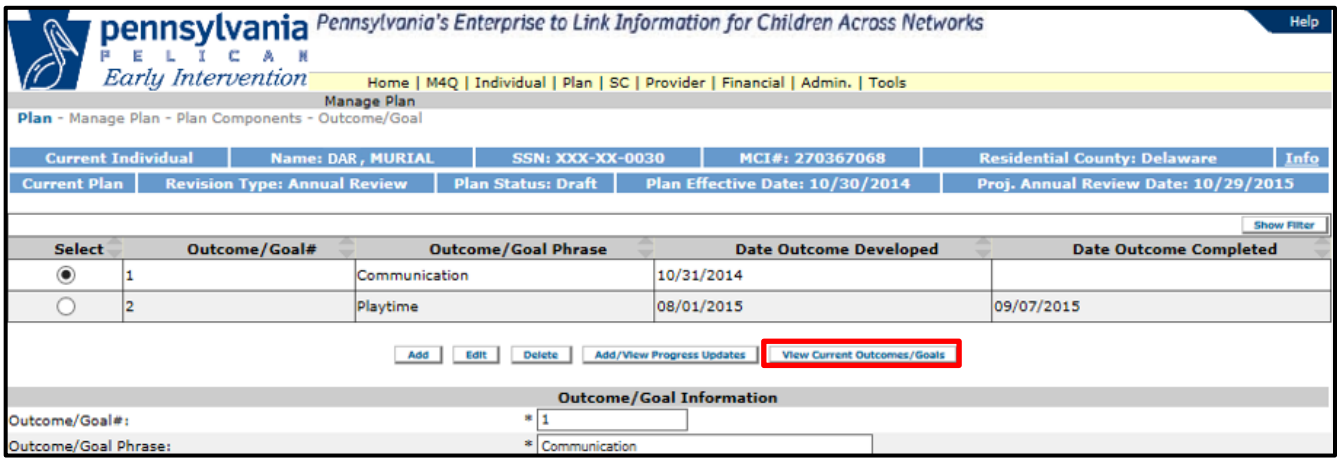


- The Outcome/Goal screen will initially display those outcomes/goals that do not have a completion date or a completion date in the future. If completed outcomes/goals exist, the *View All Outcomes/Goals* will be available to select and display those outcomes/goals.

Outcome/Goal screen with *View All Outcomes/Goals* button



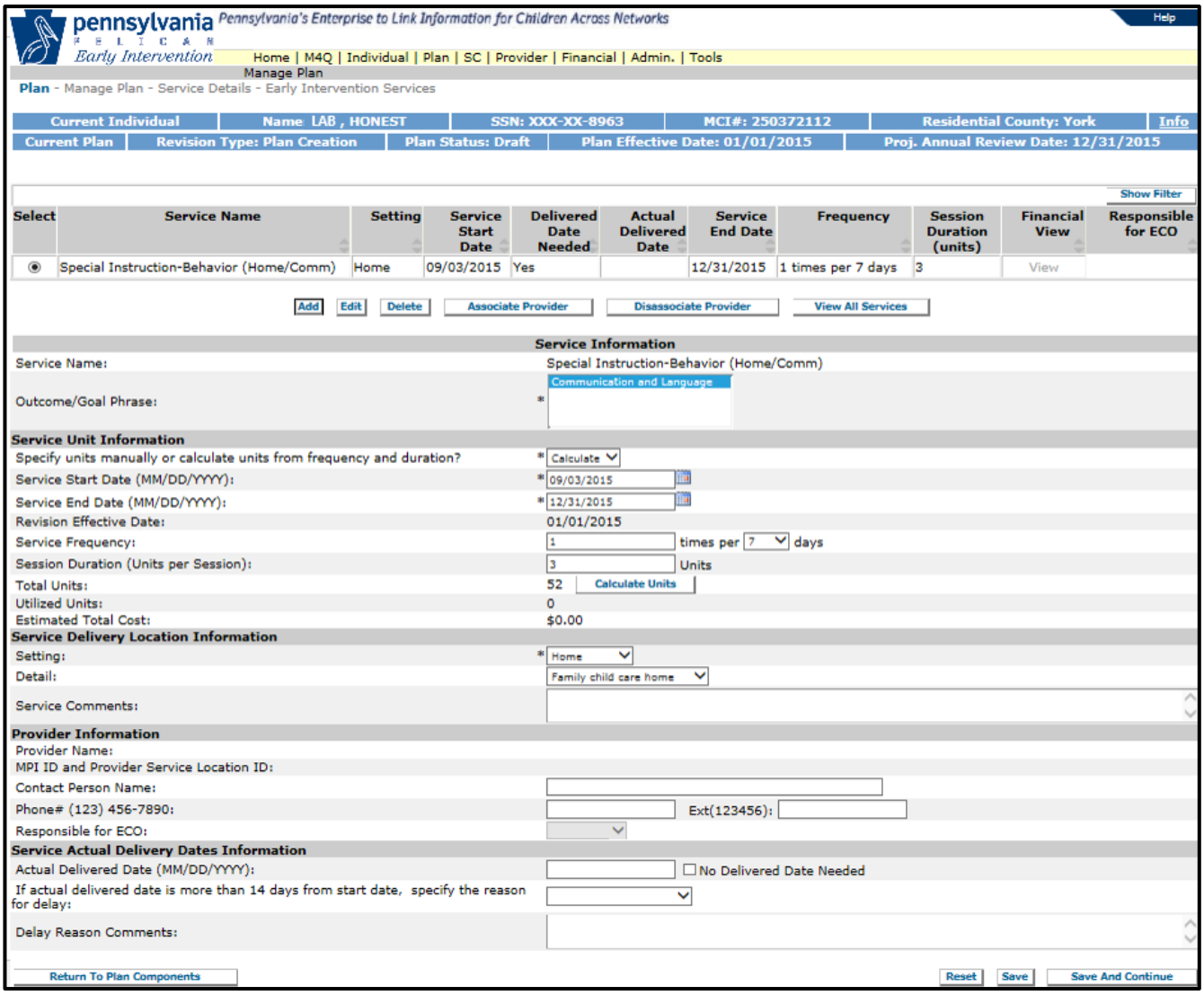
Outcome/Goal screen with *View Current Outcomes/Goals* button



- Upon navigating to the Outcome/Goal screen, services that have an end date in the future or do not have an end date will be displayed. The [View All Outcomes/Goals] button, once selected, will allow a user to view all services on a consumer's Plan. If a user would like to look at Current Outcomes/Goals, the [View Current Outcomes/Goals] button will be available to take the user to that specific view.

Early Intervention Services

Plan > Manage Plan > View/Modify Plan Details > Early Intervention Services



Above is the **Early Intervention Services** screen. A user must record details about each service on a child's plan on this screen.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- Depending on your role, you can add, edit or delete services using this screen
- You must associate each service with at least one **Outcome/Goal Phrase** (previously entered on the **Outcome/Goal** screen)
  - To associate a service with multiple outcomes/goals, hold down the **Ctrl** key and select all outcome/goals that apply
- One service unit is equivalent to 15 minutes
- You may choose to manually enter the number of service units, if desired
- If **Other** is selected from the **Setting** drop-down list, the **Participation with Typically Developing Children** screen becomes mandatory
- The **Service Start Date** represents the date the Plan is developed.

- Do not enter the **Actual Service Delivery Date** until such event has taken place
    - The **Service Actual Delivery Dates Information** section is covered in the **Update Service Details** section of this reference guide
- To revise a service after the plan has an Approved status (for example, if service units/frequency change), end-date the current service, then add the same service using a new **Service Start Date** and entering the change in service units/frequency
- When a service is rendered using more than one provider:
    - If it is a single billing provider, add appropriate units to a single service and enter the rendering provider names in the provider **Contact Person Name**.
    - If the billing providers are different, a service can be added for each billing provider as many times as needed.
- If you are receive an error message when trying to change a **Service End Date** on a child's plan where the service has been authorized, contact your SC Supervisor to report the issue. The County Financial Manager may have pre-authorized a future service segment. If this is the case, the County Financial Manager should unauthorize the future service segment.
- If you receive an error message notifying you that the **Service End Date** is past the fiscal year end date (June 30th), the provider may have identified a service end date. Notify your SC Supervisor. The SC Supervisor should work with the provider to extend the dates of their service offering.
- Users with the Provider Contributor role cannot add or modify Early Intervention Services
- Use the **Service Comments** textbox to record a phone extension, travel, service detail or service setting information
- If the **No Delivered Date Needed** checkbox is selected, a mandatory **Reason Delivered Date Not Needed** textbox appears
- Use the **Responsible for ECO** drop-down list to designate the provider responsible for entering the child's Entry ECO data, Exit ECO data, or both. The selection appears in the **Responsible for ECO** column of the table at the top of the screen.
- You can filter and/or sort to find a specific name, setting, service start/end date, frequency or duration using the arrows at the top of the columns.
- Services should never be deleted unless the information was entered in error and/or was never delivered. If the service is no longer required, end date it.

Continued on the next page.

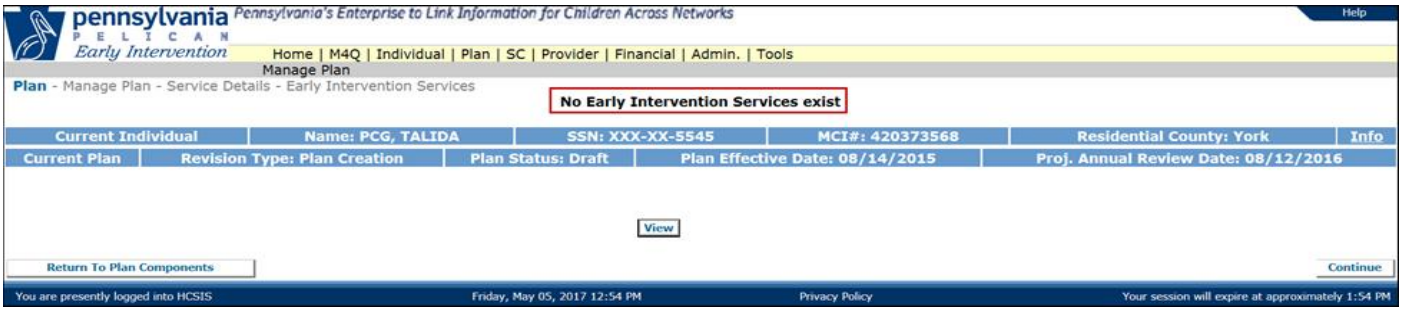
- To add a service to a previous plan year for billing purposes, select the service in the **Early Intervention Services** screen normally. When associating the provider, select the provider and contract associated with the appropriate fiscal year.
- **Note:** The Printable Plan document will not necessarily show all end-dated/historical outcomes and services information for a child's plan. Outcomes and services will only appear on the current printable plan if the **Service End Date** falls on or after the **Plan Effective Date (Annual Review Date)**. Services with a **Service End Date** prior to **Plan Effective Date (Annual Review Date)** will not be reflected on any printable plan, past or current. In order to access the history of all end-dated outcomes and services, refer to the End-Dated Outcomes and Services report located on the **Manage Plan** screen.

- To modify/update service frequency and duration, end date the service, then add the service again with the updated frequency and/or duration.

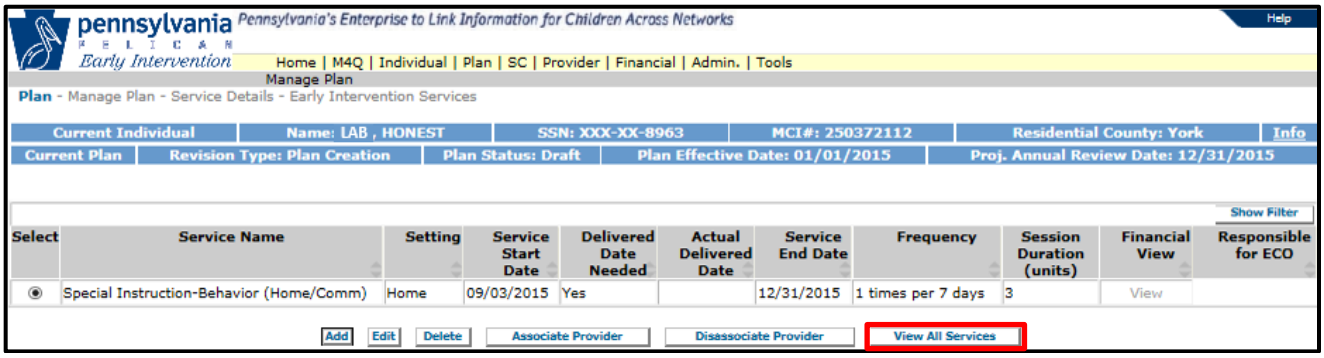
- The **Early Intervention Services** screen will display those services that have an end date in the future or do not have an end date. The [View All Services] button will be available to view all services on a consumer's Plan. If a user would like to look at Current Services, the [View Current Services] button will be available to take the user to that specific view.

- When a user clicks the [View] button on the Manage Plan Services Details Early Intervention services, for a record that does not have Early Intervention Services, the user will receive the following validation message:

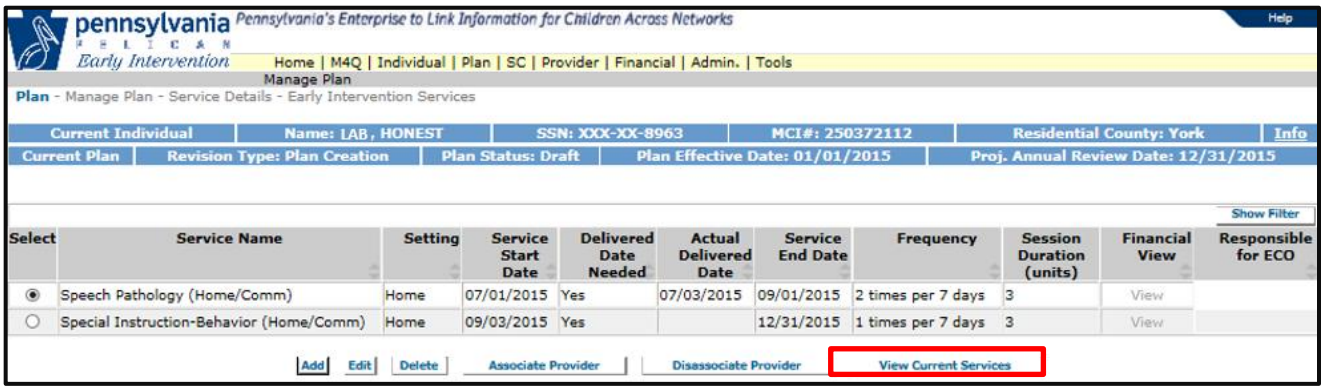
No Early Intervention Services exist



Early Intervention Services screen with *View All Services* Button



Early Intervention Services screen with *View Current Services* Button



Service Coordination Service Guidance

For the Service Coordination service, complete the **Early Intervention Services** screen as follows:

Outcome/Goal(s): Because the purpose of Service Coordination is to coordinate and monitor the IFSP, all outcomes should be linked to this service. To select all outcomes, hold the [Ctrl] on your keyboard, then left-click all outcome/goal phrases listed. Typically, Service Coordination does not need its own outcome. In some cases, it may be warranted that the team agreed to a separate Service Coordination outcome.

Service Unit Information

Service Start Date: Use the **Plan Meeting Date**
Service End Date: Use the Anticipated Plan End Date
Frequency: Reflect time anticipated. See your EI Coordinator for county instruction.
Session Duration: Reflect time anticipated. See your EI Coordinator for county instruction.

Session Delivery Location Information

Refer to the "Service Delivery Location Guidance" section below.

Actual Service Delivery Date Information

Actual Delivered Date: Use the **Plan Meeting Date**
Pre-plan/Tracking SC Services Start & End Dates: Service Dates should not overlap for the same provider.

Service Delivery Location Guidance

Primary setting is the service setting in which the child receives the largest number of hours of Part C early intervention services. Determination of primary setting should be based on the information included on the IFSP in place on the Child Count date.

- If, according to the IFSP, the only early intervention services that are provided are service coordination services or services provided to a family member, such as counseling, family training, and home visits, report for this child the setting where most of these services are provided. If this information is not specified in the IFSP, report the child in the other setting category.

- If, according to the IFSP, all of the early intervention services for a child were delivered in the same setting then that setting is the primary setting. For example, if the IFSP states that the child receives 1 hour of physical therapy services in his or her home each week, and that is the only early intervention service the child receives (in addition to service coordination services) according to the IFSP in place on the Child Count date, then the home is the primary setting for that child.

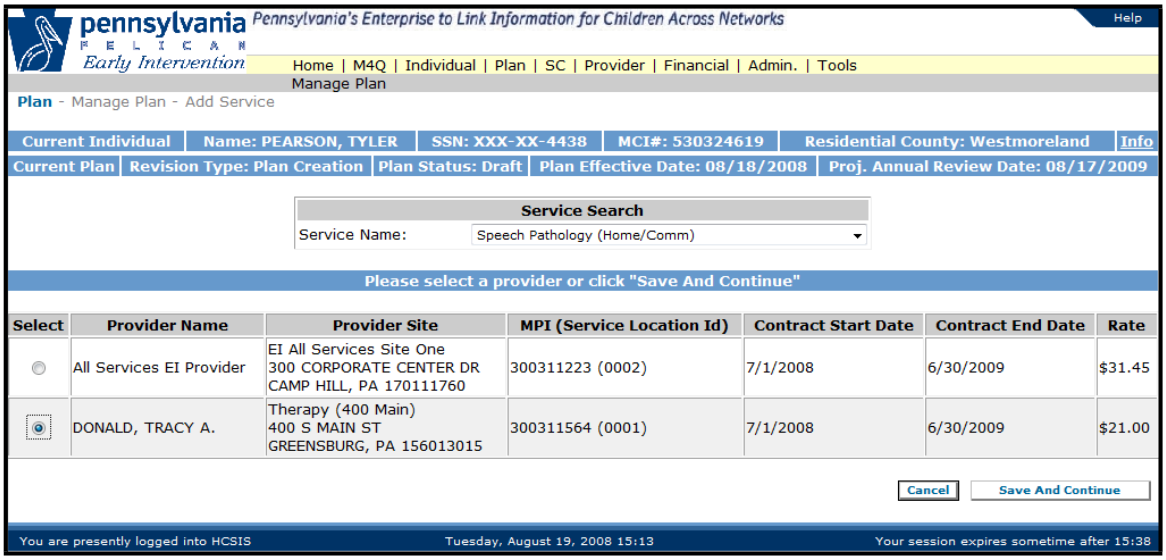
- If, according to the IFSP, a child was to receive services in more than one setting, report the child in the setting in which he or she was to receive the largest number of hours of early intervention service. For example, a toddler who receives 1 hour of service a month in the home and 4 hours of service a month in a preschool that serves children without disabilities in addition to children with disabilities, should be reported in the category "community-based setting."

- If, according to the IFSP, there is tie for primary setting (the child was to receive an equal number of hours of service in two or more settings and the child does not receive a higher number of hours of early intervention service in a different setting), report primary setting based on the following decision rules:
  1. If the child receives an equal number of hours of service in the home and one or both of the other settings, report the child in the home setting.

  2. If the child receives an equal number of hours of service in a community-based setting and other settings, report the child in the community-based setting.

Add Service

Plan > Manage Plan > View/Modify Plan Details > Early Intervention Services



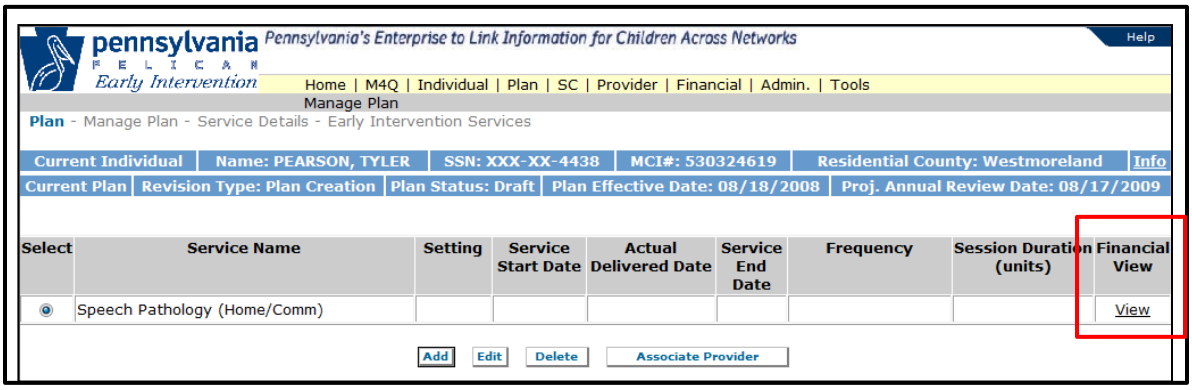
Above is the **Add Service** screen. This screen allows a user to search for a particular service to add to the child's plan.

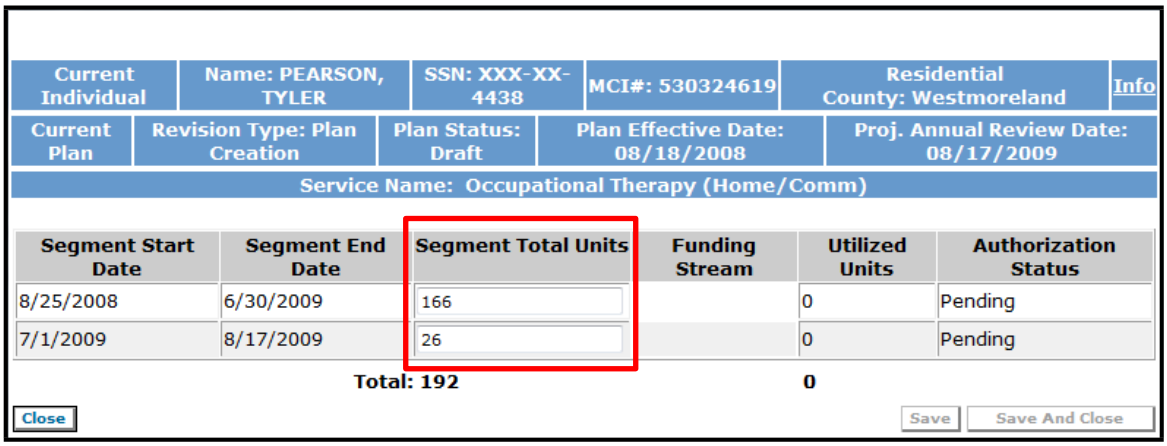
<u>Additional Things to Know:</u>

- A provider for the selected service does not have to be identified at the time of the initial plan creation
- All search results displayed on this screen represent existing contracts that currently exist between the county and provider
- To enable flexibility in billing, services for previous fiscal years will also be available for selection
  <u>Note:</u> Be sure to select the correct fiscal year for the services you are adding. If a provider is listed three times, they have a contract for the previous, current, and future fiscal year. When associating a provider with an Early Intervention Service, choose the provider line with the **Contract Start Date** and **Contract End Date** range in which the service will be held.
- If a provider's name does not appear on this screen, notify your SC Supervisor
- To add a service without associating a specific provider, click [Save and Continue] without selecting a radio button for a provider
- Users with the Provider Contributor role cannot add or modify Early Intervention Services
- If you have a service that you wish to add to the child's IFSP that is not available in PELICAN EI, notify your assigned EI Advisor.

Financial View

Plan > Manage Plan > View/Modify Plan Details > Early Intervention Services > View





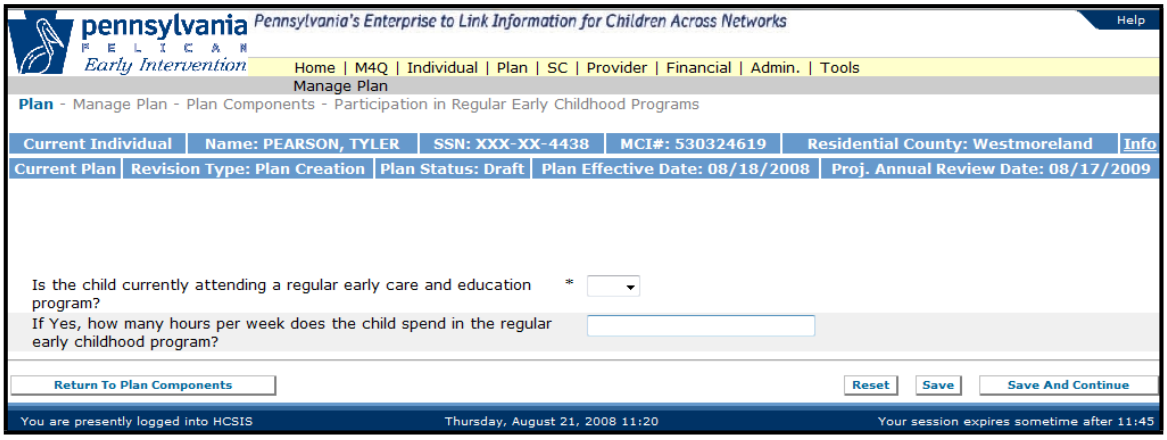
Above is the **Financial View** screen. This screen shows service authorization information for services on a child's plan. To view this screen, click the View hyperlink on the **Early Intervention Services** screen.

Additional Things to Know:

- View this screen to identify if a service has been authorized and to view utilization information
- To update the **Segment Total Units** field, a user must designate that the units will be manually entered for this particular service. To do this, select **Manual** from the **Specify units manually or calculate units from frequency and duration** drop-down list on the **Early Intervention Services** screen
- Users with the Provider Contributor role cannot add or modify Early Intervention Services.

Participation in Regular Early Childhood Programs

Plan > Manage Plan > View/Modify Plan Details > Participation in Regular Early Childhood Programs



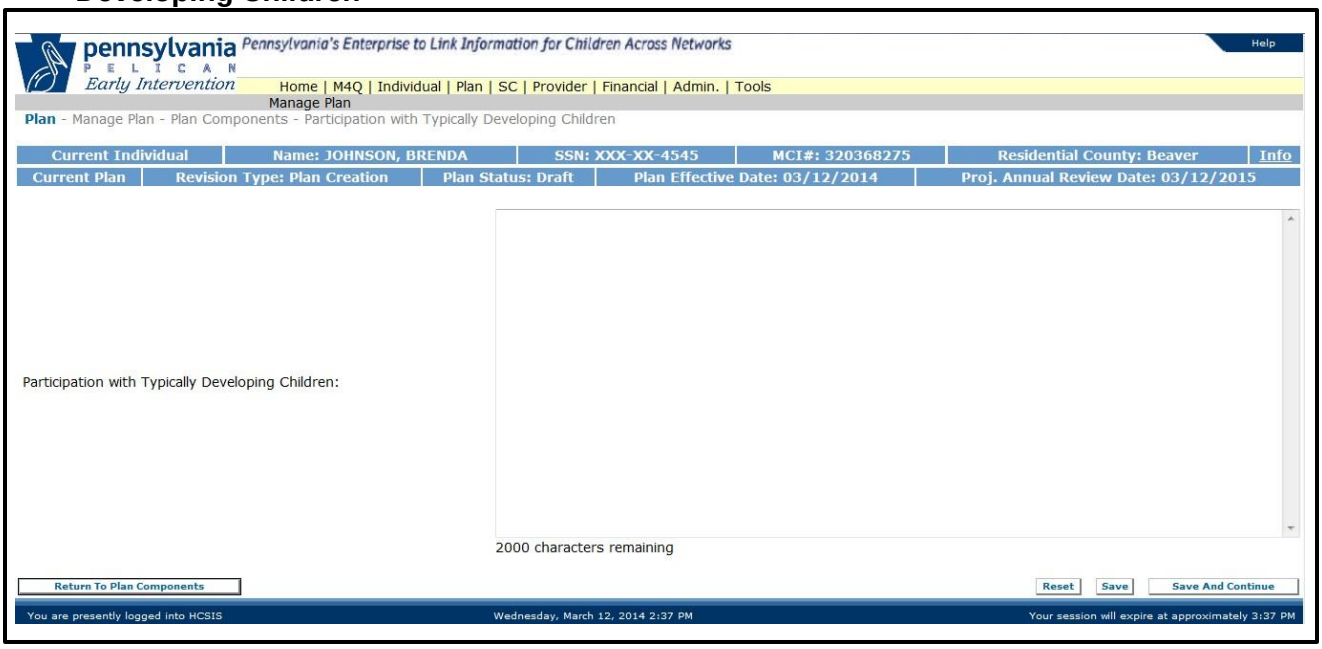
Above is the **Participation in Regular Early Childhood Programs** screen. This screen identifies if is currently attending a childcare/daycare program.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- If **Yes** is selected from the **Is the child currently attending a regular early care and education program** drop-down list, the **If yes, how many hours per week does the child spend in the regular early childhood program** text box becomes mandatory
- The **If yes, how many hours per week does the child spend in the regular early childhood program** text box accepts decimal values (for example, 20.5)
- The total hours entered in the **If yes, how many hours per week does the child spend in the regular early childhood program** text box cannot exceed 168 or an error message will appear: "Number is outside system defined limits"

Participation with Typically Developing Children

Plan > Manage Plan > View/Modify Plan Details > Participation with Typically Developing Children



Above is the **Participation with Typically Developing Children** screen. This screen identifies how a child interacts with "typically developing children."

Additional Things to Know:

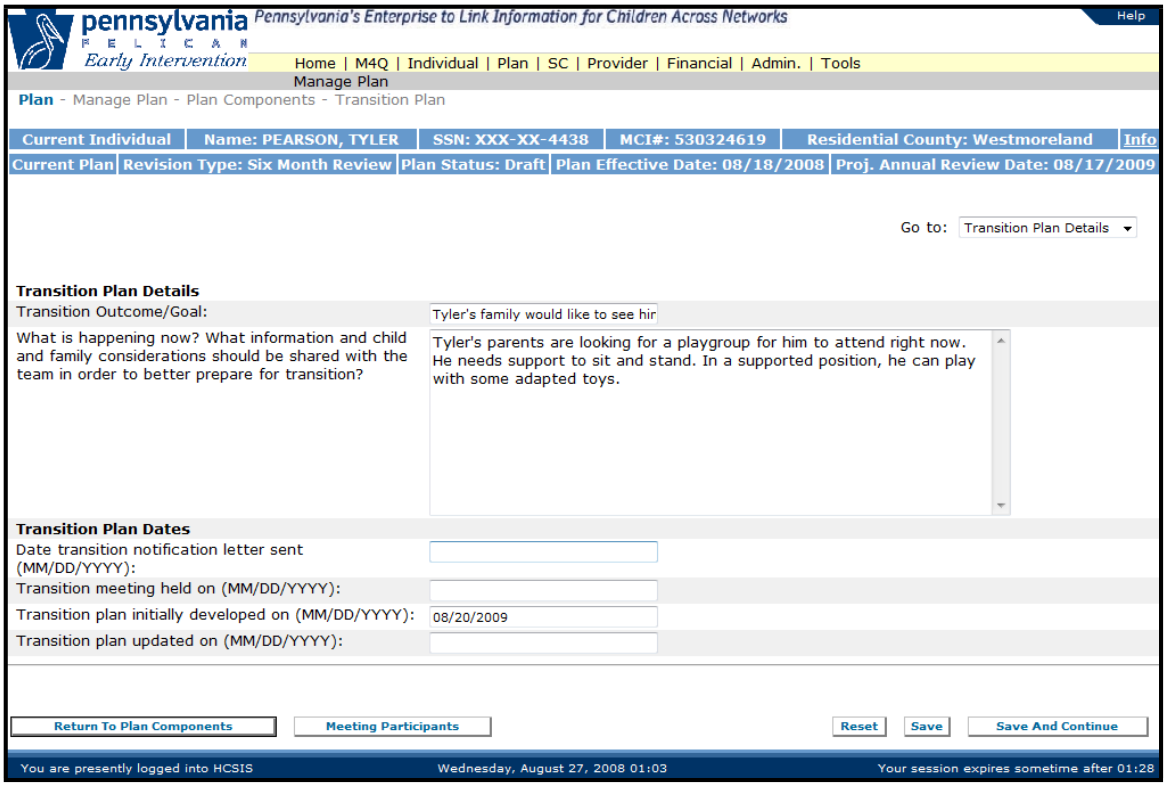
- All mandatory fields are marked with an asterisk (*).
- This screen becomes mandatory if **Other** was selected from the **Setting** drop-down list on the **Early Intervention Services** screen

Transition Plan

The Transition Plan information for a child can be captured in PELICAN EI during creation of the initial plan, or entered as a "plan revision" once the child is nearing his or her second birthday. When entering the information for a Transition Plan during initial plan creation, the screens can be accessed by navigating to ***Plan > Manage Plan > Create Initial Plan > Transition Plan***. When entering the information for a Transition Plan after a child's initial plan has been created, navigate to ***Plan > Manage Plan > View/Modify Plan Details > Transition Plan***.

Transition Plan Details

Plan > Manage Plan > View/Modify Plan Details > Transition Plan



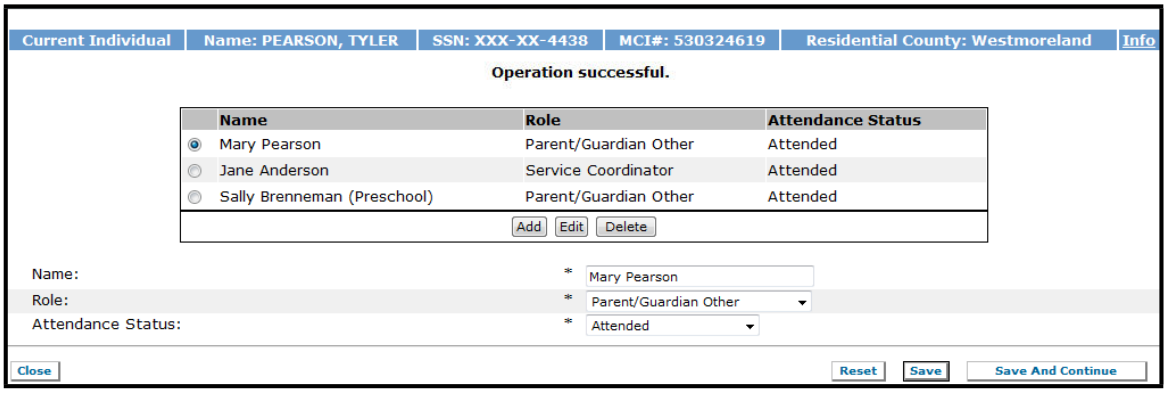
Above is the **Transition Plan Details** screen. A user should record a child's Transition Plan Outcome/Goal information on what is currently happening with the child and dates that relate to the development and progress of a child's Transition Plan.

Additional Things to Know:

- The information entered on this screen will appear on the child's printed plan
- If this screen is completed before the Transition Plan meeting was held, only enter the **Transition plan updated on** date
- All dates can be updated for Transition Plans that are already finalized
- All updates to the **What is happening now?** text box should be continuous – all new entries should be dated and entered after previously entered information

Meeting Participants

Plan > Manage Plan > View/Modify Plan Details > Transition Plan > [Meeting Participants]



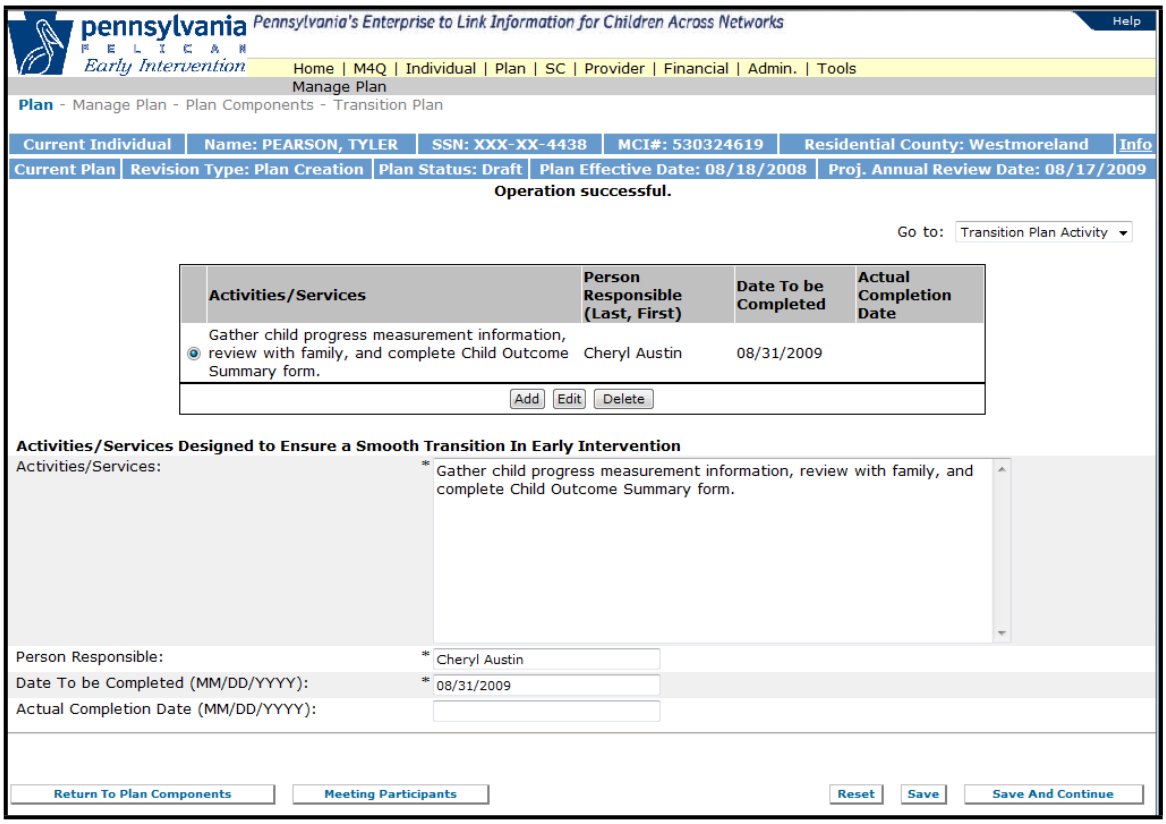
Above is the ***Meeting Participants*** screen. This screen captures a child's Transition Plan team members.

<u>Additional Things to Know:</u>

- All mandatory fields are marked with an asterisk (*)
- This screen is separate from the **Team Membership** screen
- If a user does not record information on this screen, the Transition Plan section of a child's plan will be blank
- This screen should include all Transition team members, including, for example, a preschool teacher

Transition Plan Activity

Plan > Manage Plan > View/Modify Plan Details > Transition Plan > Transition Plan Activity



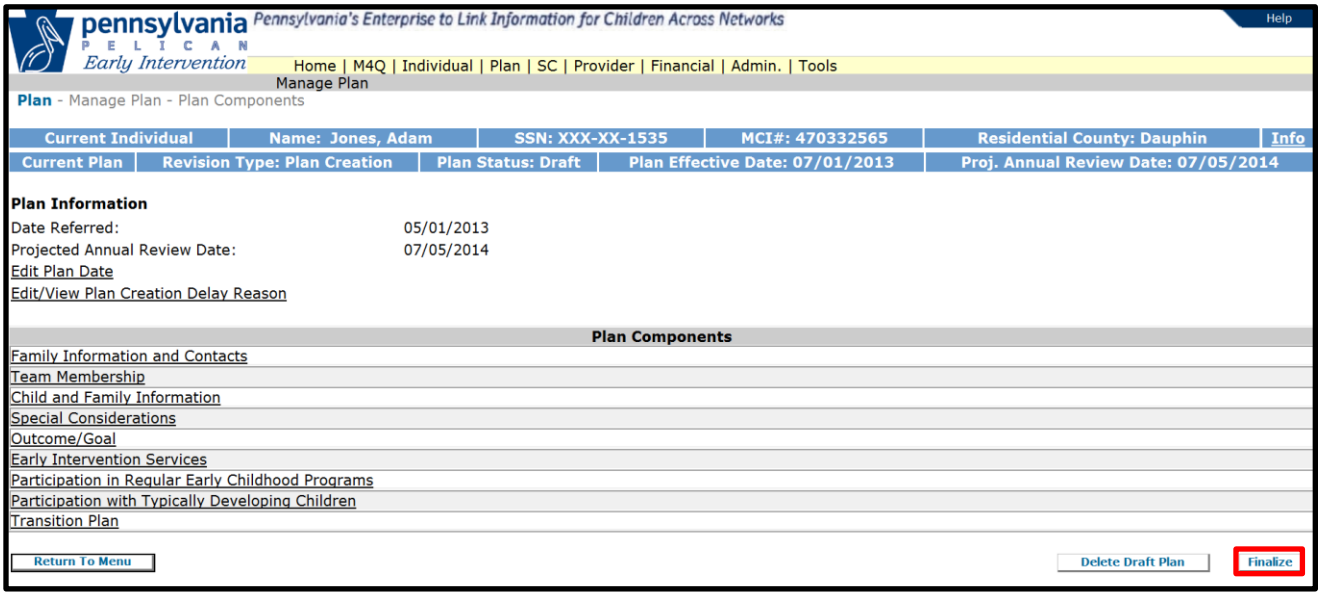
Above is the **Transition Plan Activity** screen. A user should record activities that are necessary for a child to have a smooth transition from the Infant/Toddler program to the Preschool program.

<u>Additional Things to Know:</u>

- All mandatory fields are marked with an asterisk (*)
- Activities captured on this screen should include anything – large or small – that needs to be completed before the child enters the Preschool program
- The **Actual Completion Date** field is not mandatory but should be completed once an activity is finished
- All dates can be updated for Transition Plans that are already finalized
- Updates to the **Activities/Services** text field should be continuous – all new entries should be dated and entered after previously entered information

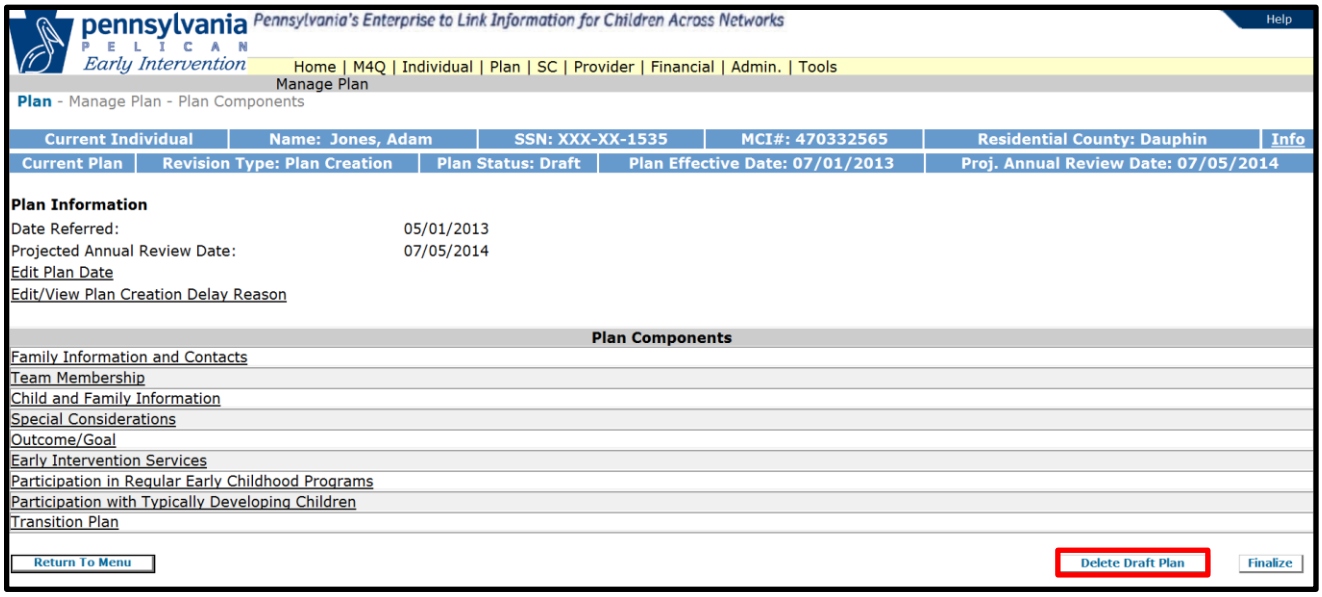
Finalize Plan

Plan > Manage Plan > View/Modify Plan Details



Delete Draft Plan

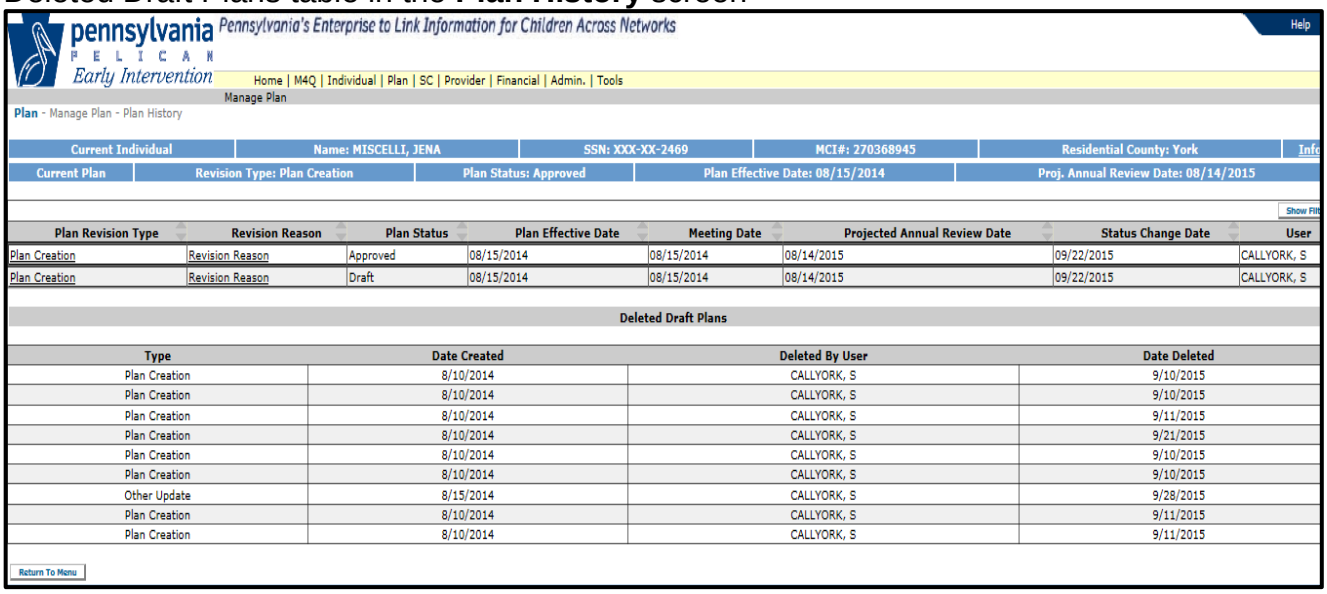
Plan > Manage Plan > View/Modify Plan Details



Additional Things to Know:

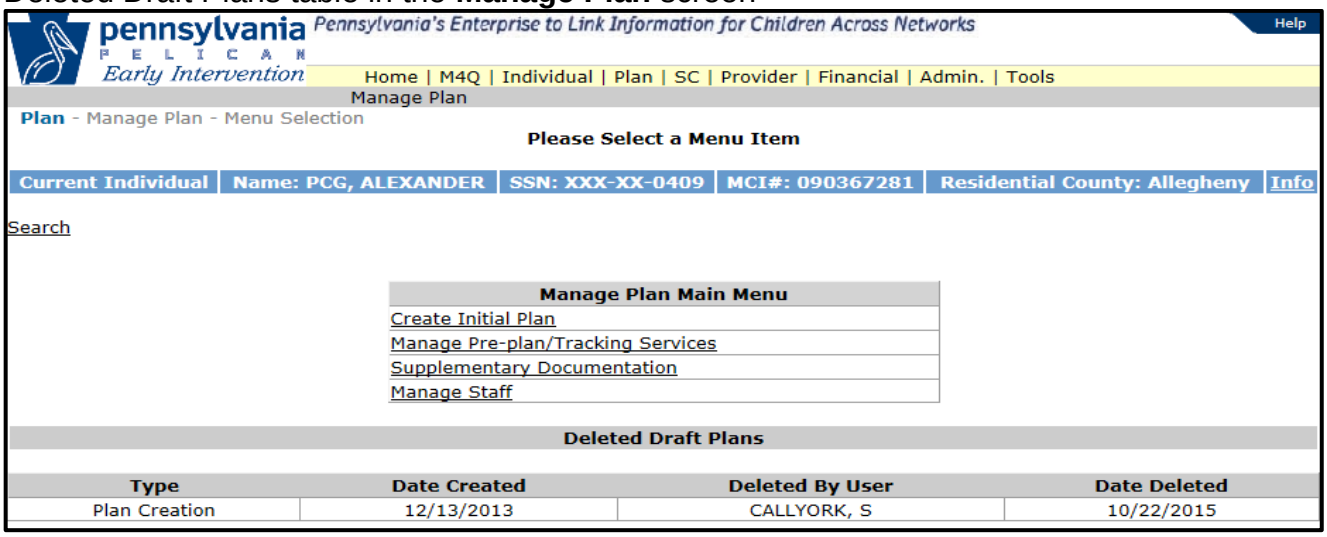
- Once a draft Plan has been deleted, the Deleted Draft Plans table is displayed in the **Plan History** screen. Information pertaining to the deletion such as Type, Date Created, Deleted By User, and Date Deleted are recorded in the Deleted Draft Plans table.

Deleted Draft Plans table in the **Plan History** screen



- If an existing draft plan is not present, The Deleted Draft Plans table will be available in the **Manage Plan** screen below the Mange Plan Main Menu.

Deleted Draft Plans table in the **Manage Plan** screen

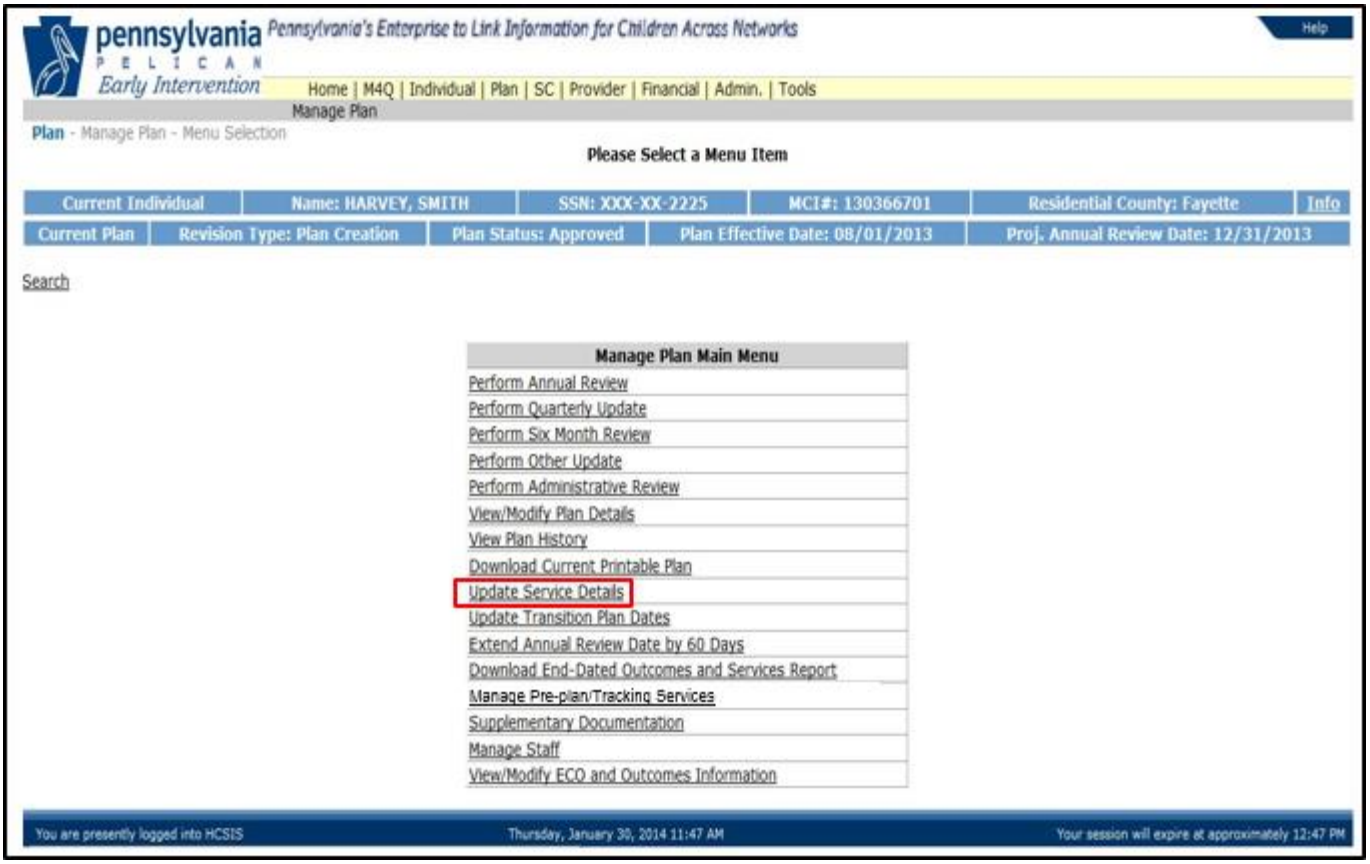


- Please refer to the *IT ER and Plan Save-Finalize-Modify Tip Sheet* for more information.

Update Service Details

Certain details on the **Early Intervention Services** screen can be updated without creating a plan revision. Once a plan has been Approved, the **Manage Plan Main Menu** will appear as shown below. Click the Update Service Details link to go to the **Early Intervention Services** screen.

Manage Plan Main Menu screen: Plan > Manage Plan > Update Service Details



Additional Things to Know:

Users can make the following updates to the Early Intervention Services screen on the finalized plan:

- Associate or Disassociate a provider to a service
- Add or change a service's **Actual Delivered Date**
- Change the following provider information:
  - **Contact Person Name**
  - **Phone#**
  - **Responsible for ECO**

Actual Delivered Date

- You must enter an **Actual Delivered Date** for the service once the service has started.
  - **If actual delivered date is more than 14 days from start date, you must specify the reason for delay in the Delay Reason Comments text box.**

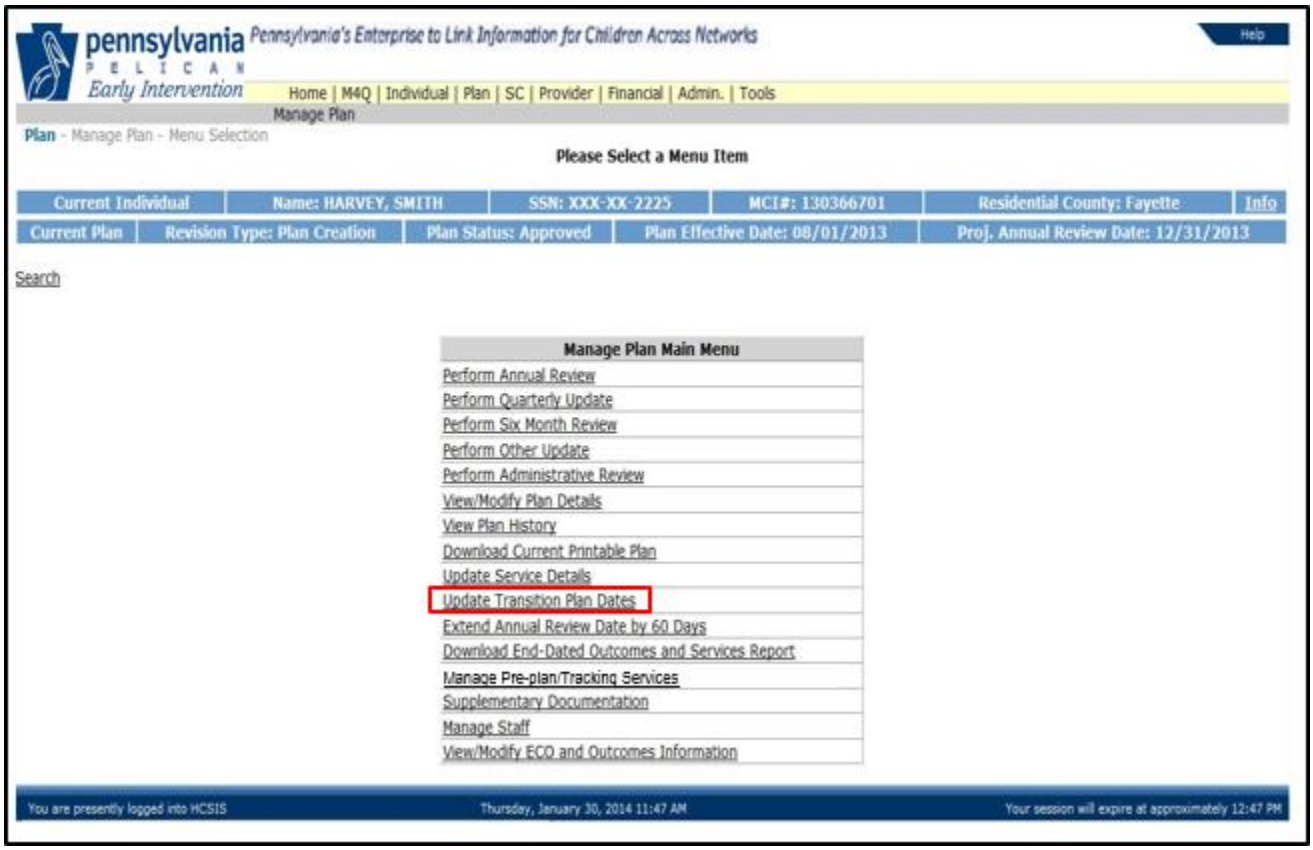
Note: The **Service Actual Delivery Dates Information** should be entered as soon as the dates become known.

- The **No Delivered Date Needed** checkbox can be selected if no delivered date is needed for the service.
  - If checked, a mandatory **Reason No Delivered Date Needed** text field will be displayed. If unchecked, the **Reason No Delivered Date Needed** text field will no longer be displayed.
  - The **Service Actual Delivery Date** should not be more than 14 days from the service start date. If actual delivered date is more than 14 days from service start date, a reason and comments must be given for the delay.

Update Transition Plan Dates

Transition plan dates can be updated for a child without creating a plan revision. Once a plan has been Approved, the **Manage Plan Main Menu** will appear as shown below. To update the child's transition plan dates, click the Update Transition Plan Dates link.

Manage Plan Main Menu screen: Plan > Manage Plan > Update Transition Plan Dates



Above is the **Manage Plan Main Menu** screen. Transition plan dates should be recorded in the system for children approaching transition to the preschool program. Click the Update Transition Plan Dates link to access the **Transition Plan Details** screen.

Additional Things to Know:

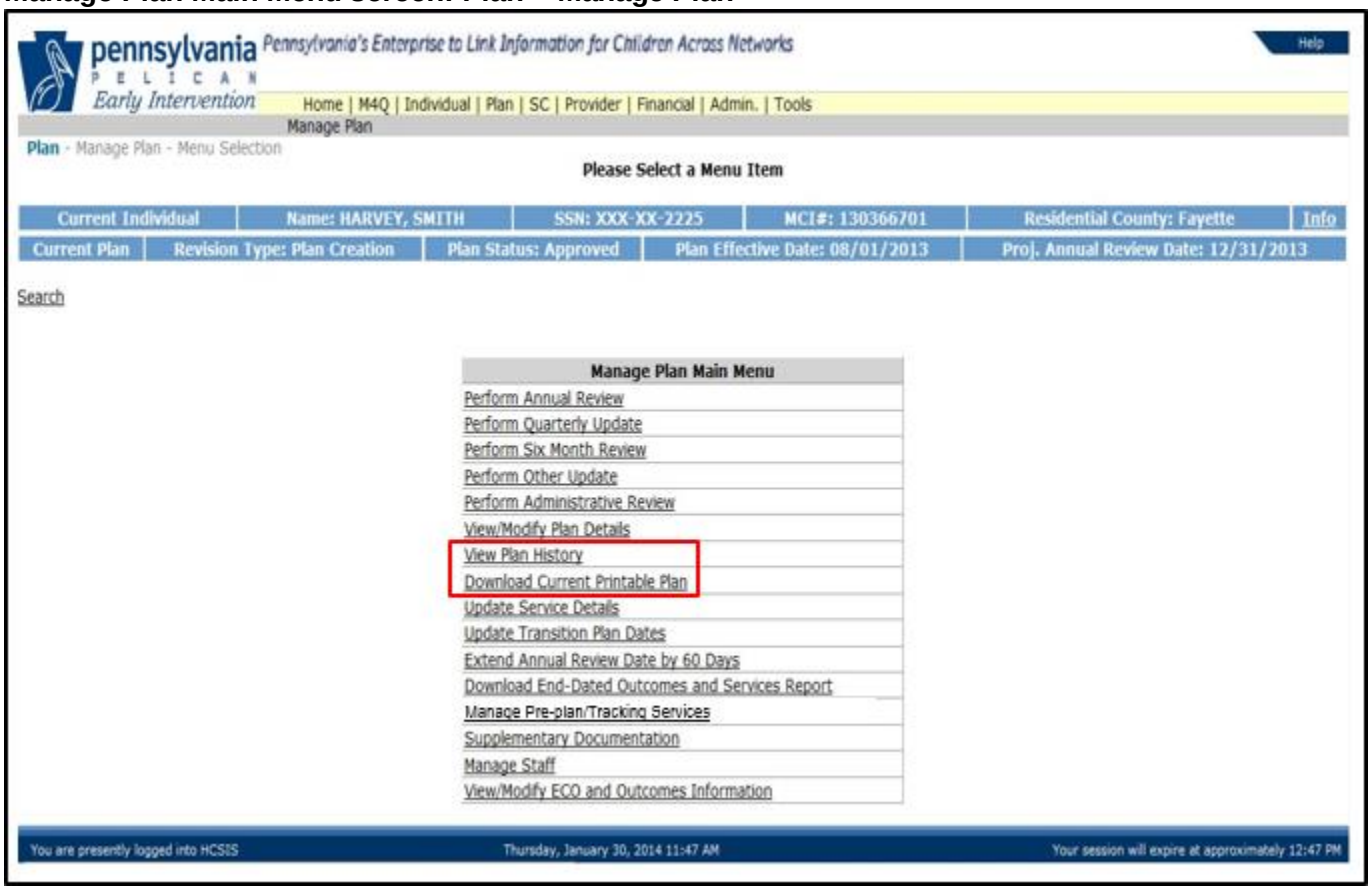
- A user can update any of the Transition Plan Date fields regardless if a child's plan is in **Draft** or **Approved** status

View Plan History and Print Plan

Each time the status of a plan changes in the system (i.e. moves from **Draft** or **Approved**), the system takes a "snapshot" of the plan and saves it in the **Plan History** screen.

You may view and print a PDF version of the child's current plan (defined as either the most recent in-progress or finalized Plan) by clicking the Download Printable Plan link.

Manage Plan Main Menu screen: Plan > Manage Plan

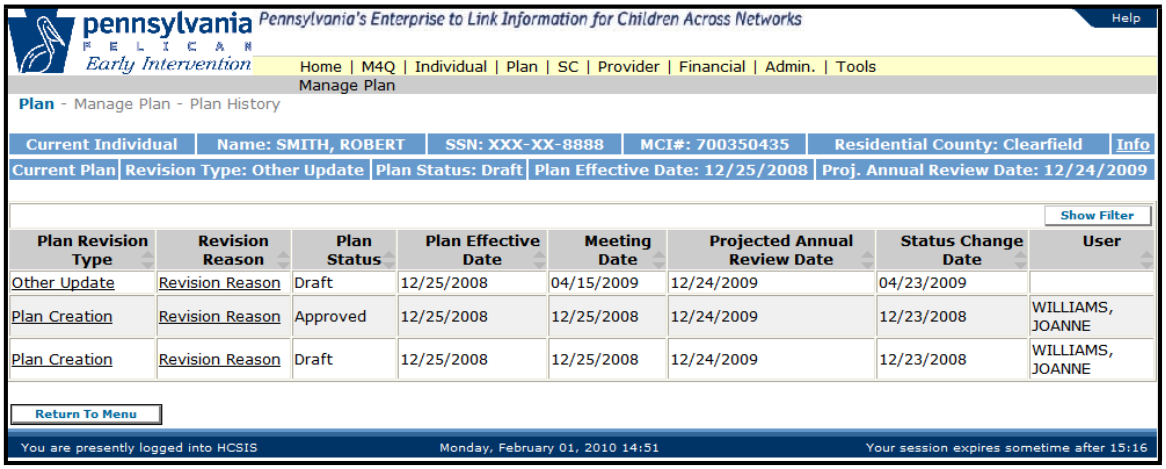


Above is the **Manage Plan Main Menu** screen. Use this screen to select the task you would like to perform on a child's plan.

Additional Things to Know:

- Click the Download Printable Plan link to open a child's current plan. The user will be prompted with a dialog box to either open or save the plan
- Click the View Plan History link to navigate to the **View Plan History** screen
- **Note:** The Printable Plan document will not necessarily show all end-dated/historical outcomes and services information for a child's plan. Outcomes and services will only appear on the current printable plan if the **Service End Date** falls on or after the **Plan Effective Date (Annual Review Date)**. Services with a **Service End Date** prior to **Plan Effective Date (Annual Review Date)** will not be reflected on any printable plan, past or current. In order to access the history of all end-dated outcomes and services, refer to the End-Dated Outcomes and Services report located on the **Manage Plan** screen.

Plan History screen: Plan > Manage Plan > View Plan History



Plan Revision Type	Revision Reason	Plan Status	Plan Effective Date	Meeting Date	Projected Annual Review Date	Status Change Date	User
Other Update	Revision Reason	Draft	12/25/2008	04/15/2009	12/24/2009	04/23/2009	
Plan Creation	Revision Reason	Approved	12/25/2008	12/25/2008	12/24/2009	12/23/2008	WILLIAMS, JOANNE
Plan Creation	Revision Reason	Draft	12/25/2008	12/25/2008	12/24/2009	12/23/2008	WILLIAMS, JOANNE

Above is the **Plan History** screen. A user can review a child's plan history and download historical plans from this screen.

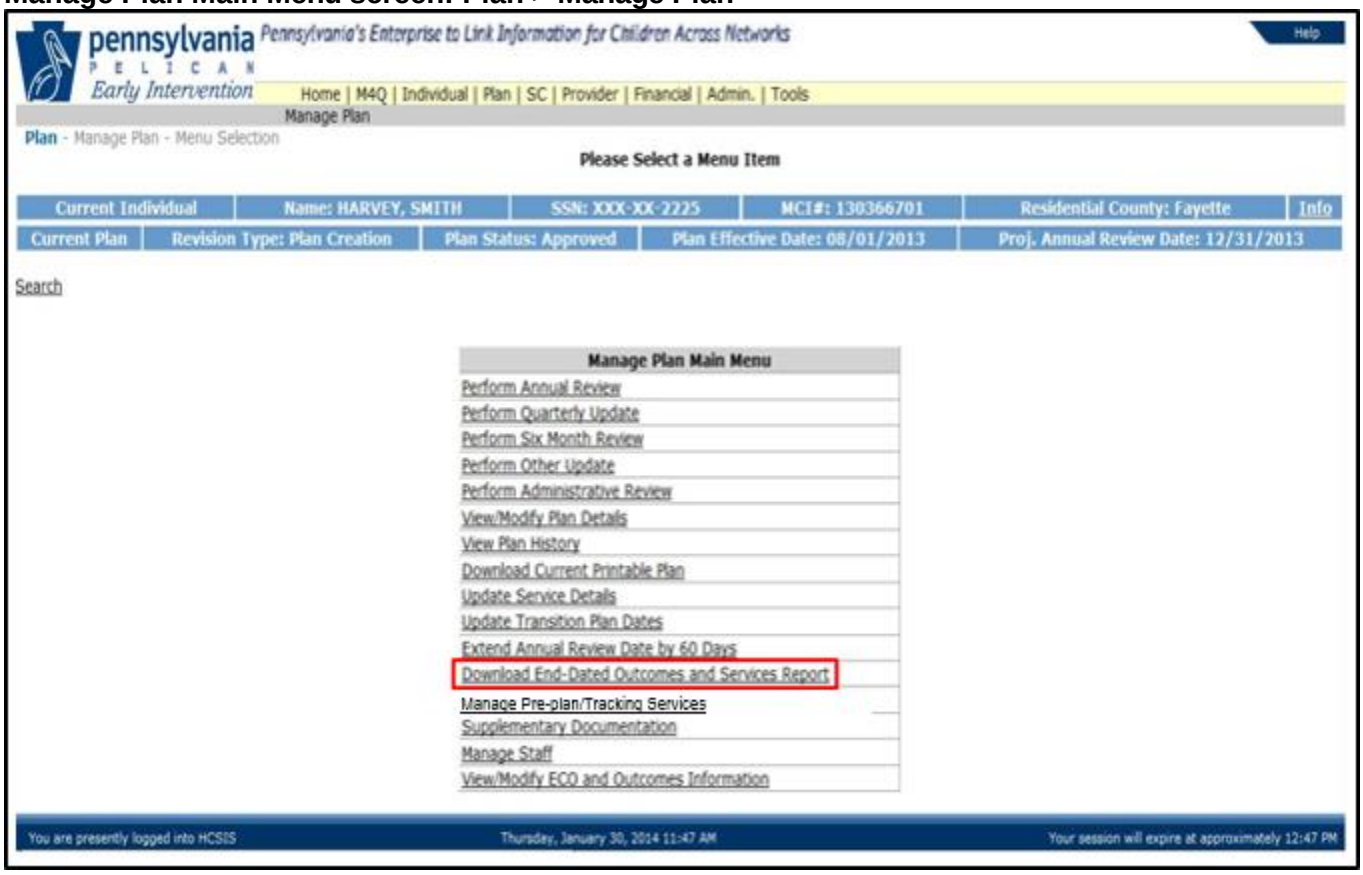
Additional Things to Know:

- To view the plan snapshot, click the hyperlink associated with the **Plan Revision Type** and plan dates that you would like to see
- To view the reason and comments pertaining to why the plan was revised, click the Revision Reason link
- The blue informational bar at the top of the screen can be used as a reference to view the current status the child's plan
- At annual review, user can edit the Plan Effective date to one that precedes the original date entered while the plan is in draft status. Click Edit Plan Date from the Plan Components Screen to change the date. Remember that service dates may also need to be changed when the meeting date is moved. These dates should be updated on the Service Details screen.

End-Dated Outcomes and Services Report

The End-Dated Outcomes and Services Report is a report which shows all end-dated/historical outcomes and services information for a child's plan since this historical information would not usually appear in the regular Printable Plan document. This End-Dated Outcomes and Services Report can be printed as a stand-alone document and provided to the child and the child's family. Users can view and download the End-Dated Outcomes and Services Report from the Manage Plan screen.

Manage Plan Main Menu screen: Plan > Manage Plan



Above is the **Manage Plan Main Menu** screen. Use this screen to select the task you would like to perform on a child's plan.

Additional Things to Know:

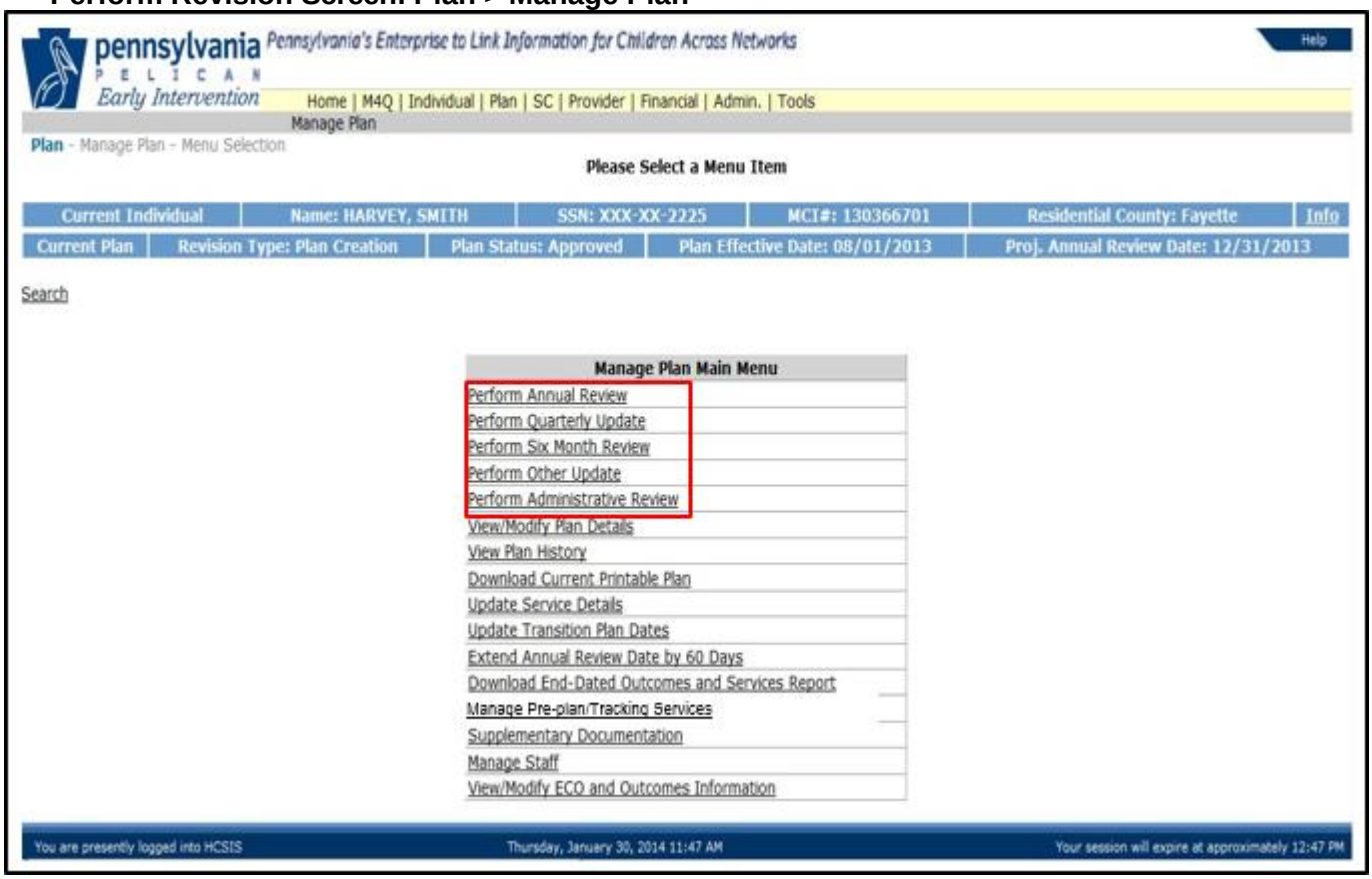
- Click the Download End-Dated Outcomes and Services Report link to open the report. The user will be prompted with a dialog box to either open or save the report.
- Only end-dated/historical outcomes and services that are end-dated before the **Plan Effective Date** (**Annual Review Date)** will display on the report.

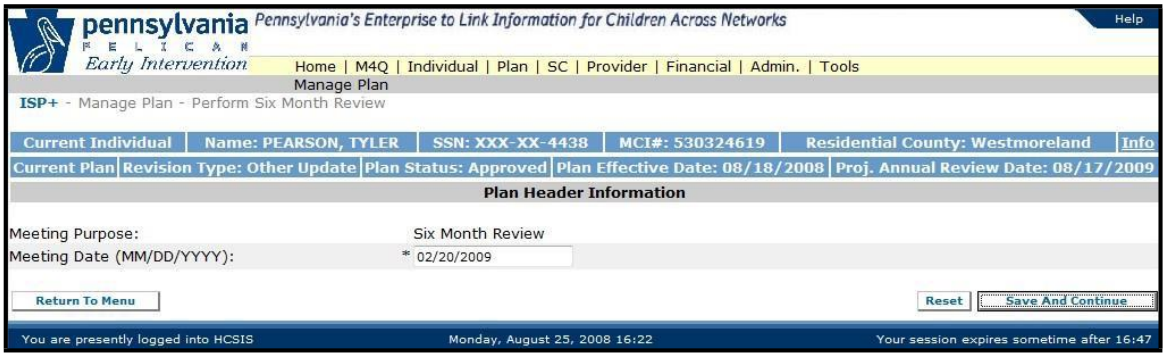
Perform a Revision

Once a plan has been submitted, the status of the plan changes from **Draft** to **Approved.** To update an approved plan, the user must initiate a plan revision. Plan revisions may include modifications to one or more screens within the Plan module. To initiate a revision, click one of the following plan revision links on the **Manage Plan Main Menu** screen *(***Plan > Manage Plan***)*:

- Perform Annual Review
- Perform Quarterly Update
- Perform Six Month Review
- Perform Other Update
- Perform Administrative Review

Perform Revision Screen: Plan > Manage Plan





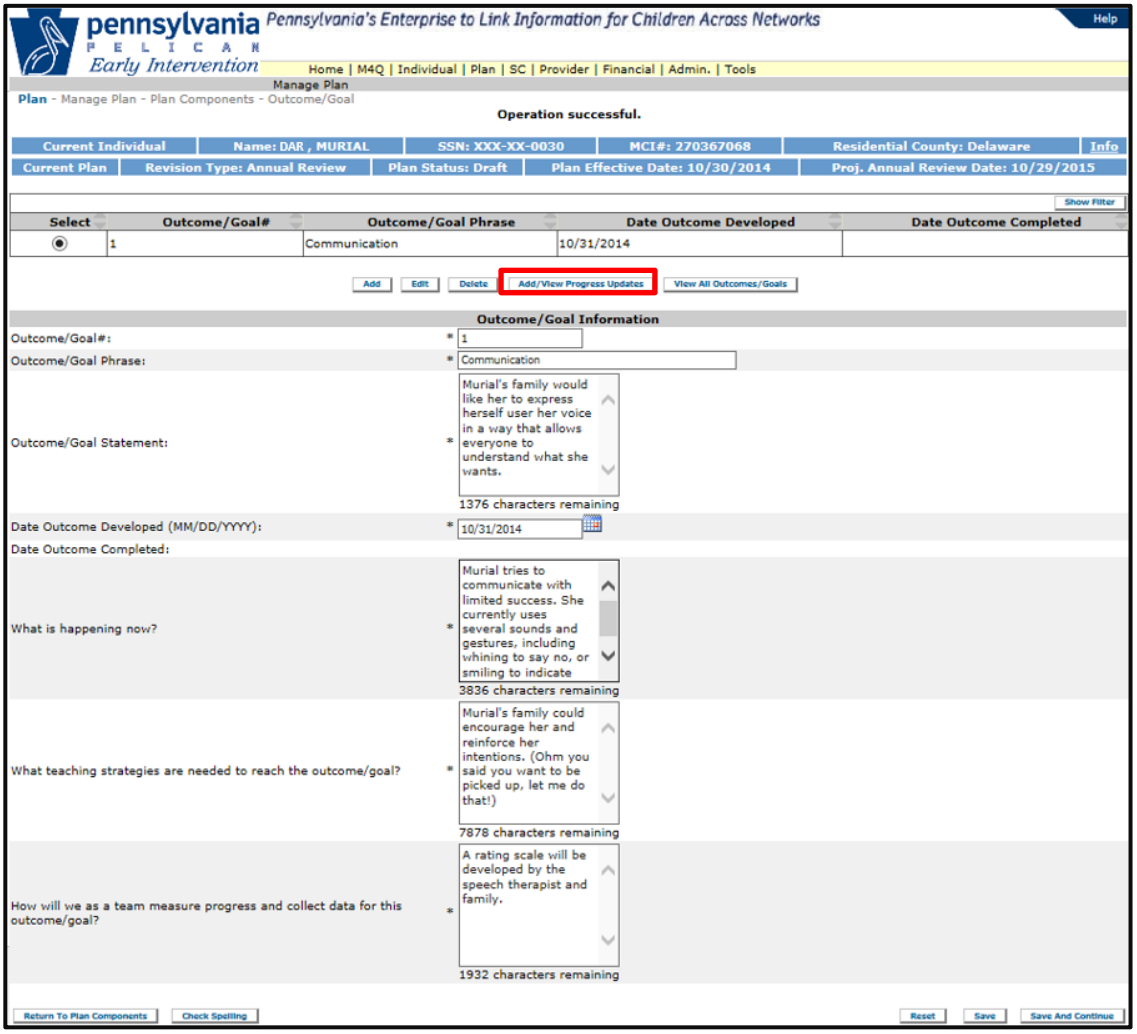
Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- When the Perform <Revision> link is clicked, a confirmation message appears: "Are you certain you want to create a new <Revision> Draft Plan?" Click [Yes] to create the draft or [No] to cancel.
- After confirming the desired revision type, the user will be prompted to enter the date of the plan's revision on the **Perform Revision** screen
- The date entered in the **Meeting Date** text box controls the earliest **Service Start Date** that can be entered on the **Early Intervention Services** screen, therefore if modifying a plan in which you need to add a service start date that occurred in the past, use the start date of the service to enter in the **Meeting Date** text box
- From the **Plan Components** screen, users may click the Edit Plan Revision Date link to edit the **Plan Revision Date** if incorrectly entered
- The **Plan Components** can be accessed and completed in any order
- Once all revisions are complete, click [Finalize] to approve the child's plan
- Users with the Provider Contributor role cannot initiate a plan revision
- Revisions performed using the Perform Administrative Review revision type will be tracked in the Plan History screen, but not in the Printable Plan document.
    - Note: This revision type is only be available to users with the SC Unit Manager role.

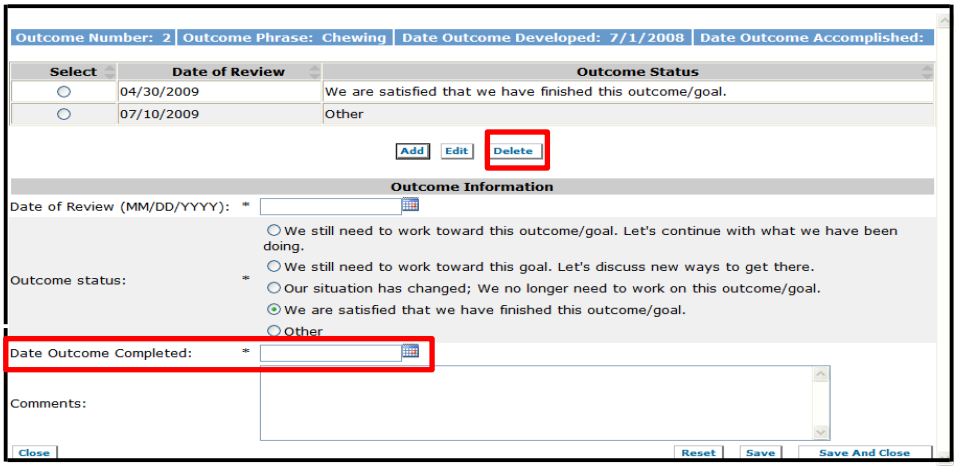
Common Revisions

The following list below outlines the screens that are most commonly updated during a given Plan revision:

- Team Membership
  - A user should update this screen to accurately reflect who attended (or was involved in) a child's plan revision
  - If this screen is not updated during plan revision activities, the child's printed plan will not display the most current information
- Outcome/Goal

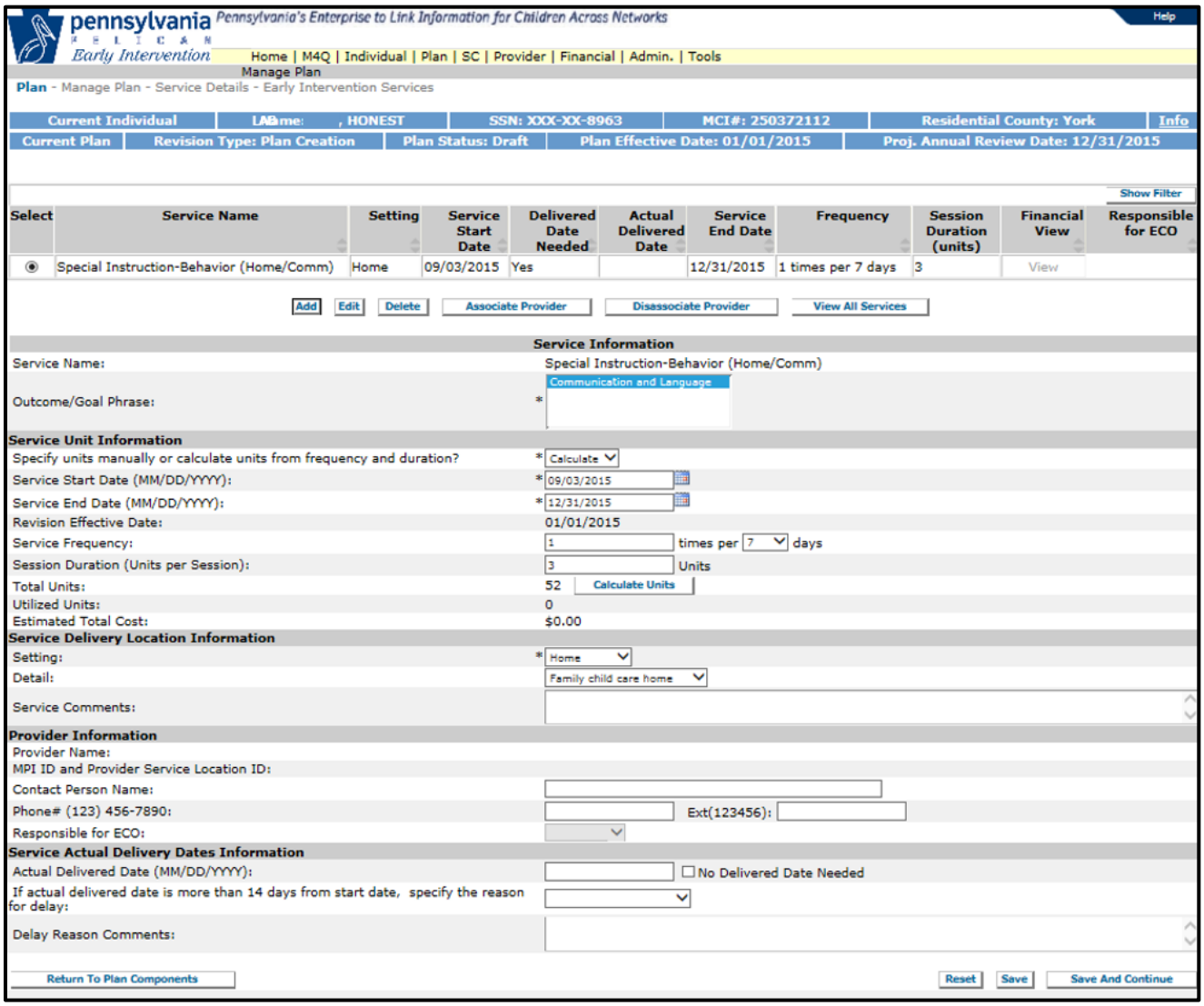


- A pop-up box, shown below, will appear when the user clicks [Add/View Progress Updates]. If an outcome/goal has been completed, select **We are satisfied that we have finished this outcome/goal** for the **Outcome Status**.
- A **Date Outcome Completed** text box will appear under **Outcome Status** if this option is chosen. Outcome progress updates created in error may be deleted.
- Once a completed outcome is saved, it can be viewed by selecting the [View All Outcome/Goals] button on the Outcomes/Goals screen.



- Early Intervention Services
  - If the **Service Start Date** needs to be modified because of a change in units (increase or decrease), the existing service should be end-dated and the same service should be re-added to the plan with a *new* **Service Start Date**
  - If the number of units *increase* for a particular service, that service will need to be re-authorized

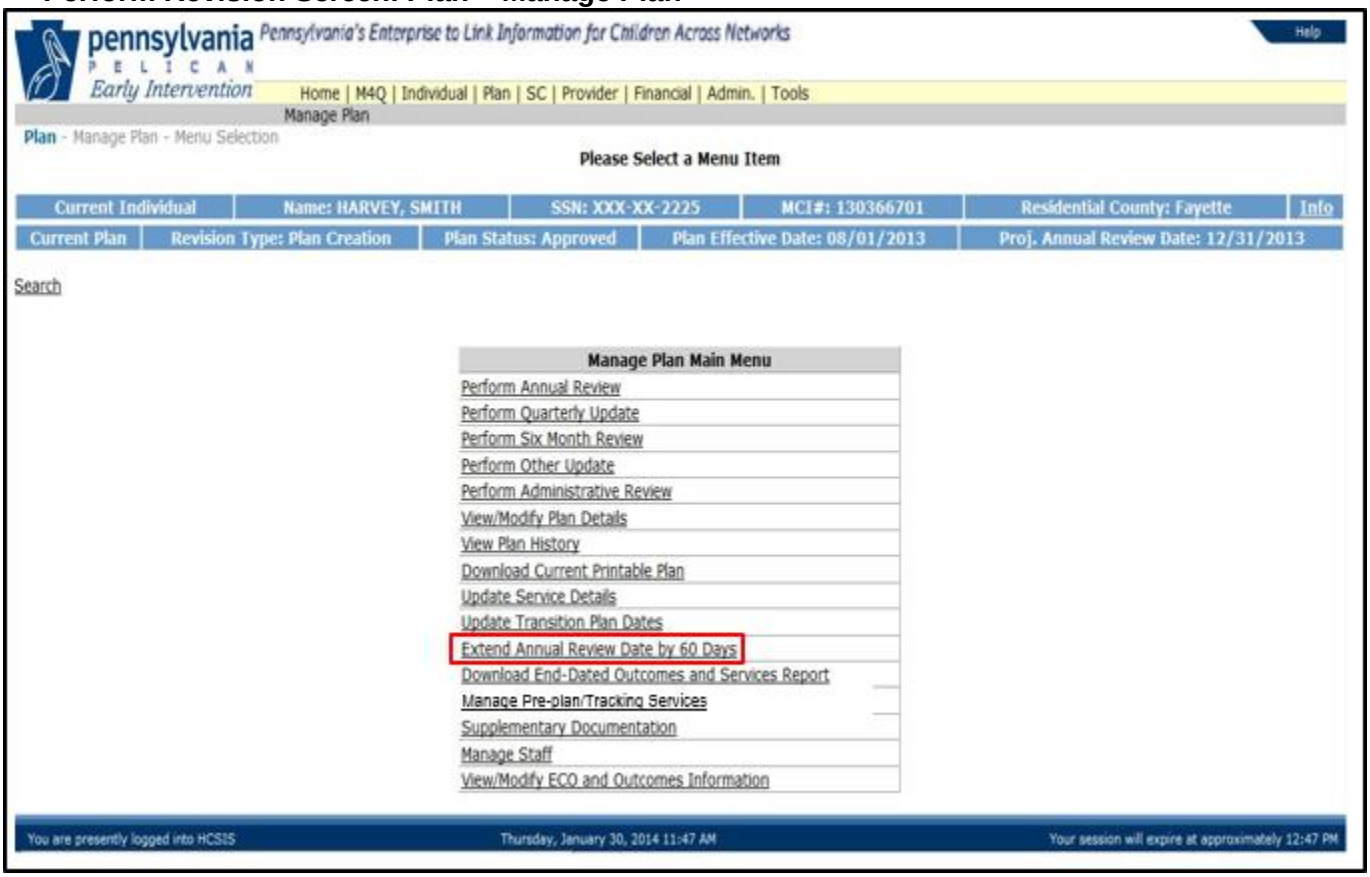
- If the number of units *decrease* for a particular service, that service does not need to be re-authorized

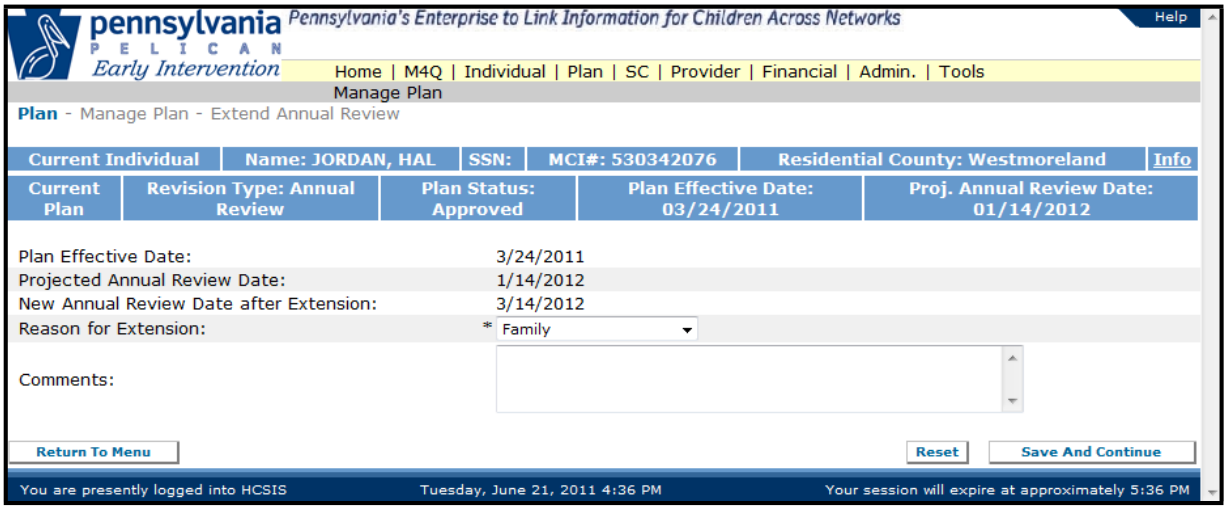


Extend Annual Review Date by 60 Days

If the **Annual Review Meeting Date** is past the **Projected Annual Review Date** of the previously finalized IFSP, the Annual Review must be extended by 60 days and a reason for the extension documented. The PELICAN EI system roles of SC Supervisor or SC Unit Manager may extend the Annual Review Date by 60 days.

Perform Revision Screen: Plan > Manage Plan





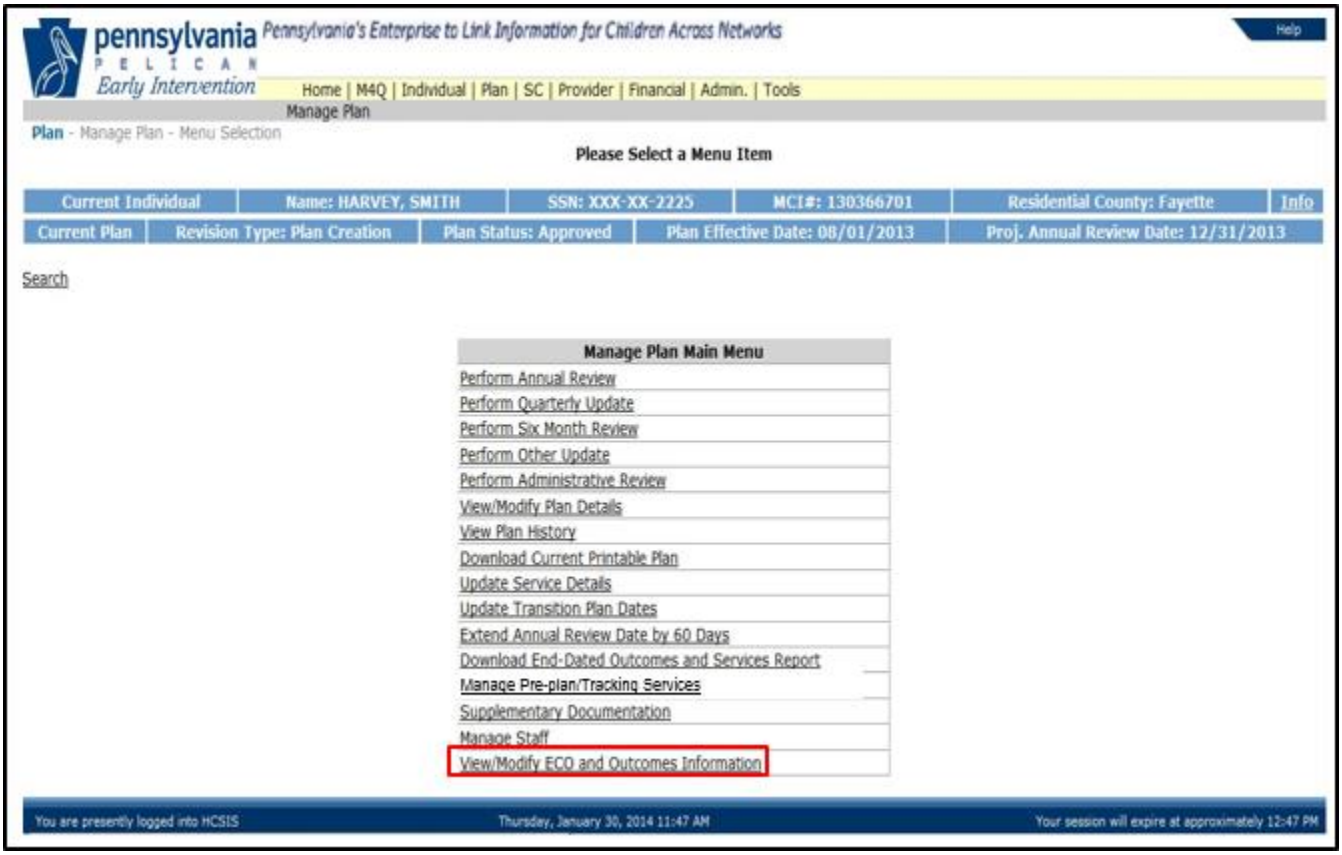
Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- When the Extend Annual Review Date by 60 Days link is clicked, a confirmation message appears: "Are you certain you want to create a new Annual Review Draft Plan?" Click [Yes] to create the draft or [No] to cancel.
- The **Extend Annual Review** screen requires the user select a **Reason for Extension** from the drop-down list. Reasons for Extension include: Act of Nature/Weather, Family and System.
    - The delay reason of "System" is used to notate any delay due to SC Program delays.
- Additional information can be entered in the **Comments** text box, if necessary.
- Click [Save and Continue] on the **Extend Annual Review** screen to be directed to the **Plan Components** screen of the most recent, Approved IFSP displaying the extended Projected Annual Review Date.

View/Modify ECO and Outcomes Information

After the child's initial plan is finalized, the **Manage Plan Main Menu** provides users with a link to the **ECO and Outcomes Information** screen, where they can enter ECO Entry and Exit Data, including OSEP Ratings and Categories, in PELICAN EI. Refer to the ECO Reporting Process Guide in the PELICAN EI: All Early Childhood Outcome Data course to be sure that users have the correct two (2) roles needed to enter ECO data.

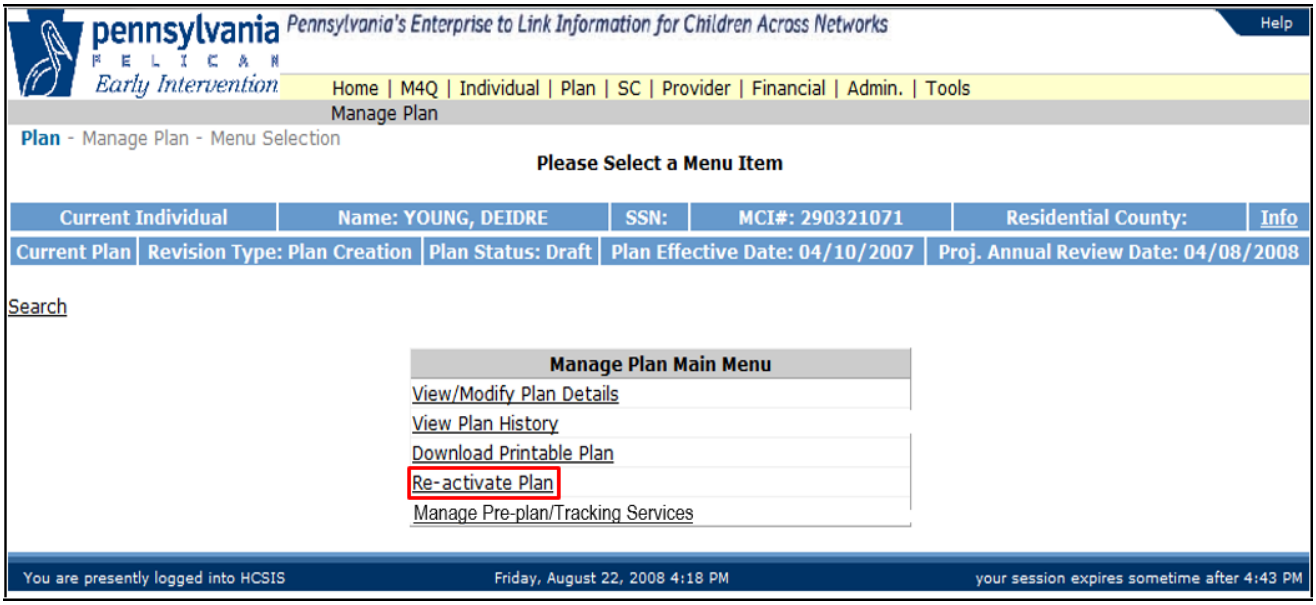
Perform Revision Screen: Plan > Manage Plan



Reactivate Plan

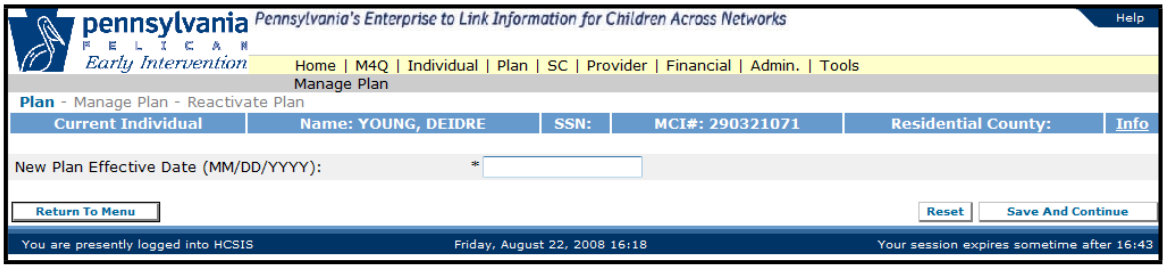
When a child's record is closed in PELICAN EI, his/her plan becomes inactive and cannot be updated. In order to update an inactive plan, the user must re-activate the child's record and the plan.

Manage Plan Main Menu Screen: Plan > Manage Plan



Above is the **Manage Plan Main Menu** screen for a child that has an inactive plan. Click Re-activate Plan to re-activate a plan for a child whose record has previously been closed in PELICAN EI. This link will only appear for those children whose records have been closed.

Re-activate Plan Screen: Plan > Manage Plan> Re-activate Plan



Above is the **Reactivate Plan** screen. This screen is used to enter the date when a child's plan should be re-activated in the system, making the child's plan editable.

Additional Things to Know:

- All mandatory fields are marked with an asterisk (*)
- Enter the **New Plan Effective Date** to begin editing a child's plan
- Users with the Provider Contributor role cannot re-activate a plan