Completing the Family Info Tab

This guide covers how to enter information into the Family Info tab as a part of the intake process.

Disclaimer: This training aims to enhance the knowledge, skills, and proficiency in using ACORN as it relates to Early Support Services and should not substitute required programmatic training. The information presented in this content reflects the system build at the time of training.

Washington State Department of
CHILDREN, YOUTH & FAMILIES

Family Info
Family Base

How To

View and Edit Family Data

Step / Action
1. After completing child lookup and selecting edit child or after adding a child, select **Family Info**
2. Select **Family** to view auto-generated Base Family information
3. Existing Base Family Information will appear
4. Select **Edit** to add Family Members

Note

- Fields marked with an asterisk(*) are mandatory.
- Adding a child, automatically creates a family base and the EI child is the first member.
- A child should only have **ONE** Family Base
- If the child enters foster care, the foster care family will be added as new family members.
- If a child is adopted, the adopted family will be added as new family members.

Edit Family
Add Family Members

🔍 How To

Add a Family Member

ℹ️ Note

- Enter new family members or Edit existing members
- Family Member's family type such as Surrogate Parent or Legal Guardian can be added and/or ended by adding an end date within the **Family Member Information** panel.

Step / Action

1. The **Edit Family** Screen displays housing the Family Member panel.
2. Select the **Add Family Members** button.

Child at a Glance	Child Info	Family Info	Funding Sources	Eval Info	Eligibility	IFSP	Services	Child/Family Outcomes	Transition	Transfer, Exit, & Reopen	Document

Family
Contact Log

⊞ Family -Default Report- ⌄ ⚙ ⤢ ▬

Add Family Excel

🔍 Search... Rows per page 10 ⌄

Family ID	Start Date	End Date	Last Name	Homelessness	Military Family	Action
194	08/08/2023			Yes	Yes	Edit

Showing 1 to 1 of 1 entries Prev 1 Next

Add Family Member
Family Member Information

🔍 How To

Add an individual family members to family

ℹ️ Note

- An asterisk (*) indicates a required field.
- A family member is **anyone** in the Child's life. (i.e., grandparent, daycare provider, surrogate parent, foster parent, etc.)
- To mask information, select the **Mask Information** checkbox.
- Not all roles will be able to add a family member
- There must be only one primary contact.

Step / Action

1. Select the family member type from the **Family Member Type field**.
2. The **Child ID field** automatically prepopulates.
3. Enter a **Start Date**.
4. Select a **Family Status**.
5. Enter the **Family Member Sex**.
6. Select a **Salutation**.
7. Enter the **Family Member First Name**.
8. Enter the **Family Member Last Name**.
9. Enter the **Family Member Birth Date**.
10. Enter the **Family Member Email Address.**
11. Enter the **Family Member Contact Type**.
12. Enter the **Family Member Dominant Language**.
13. Enter a *check mark* if the **Family Member Insures the Child**.
14. Select **Submit** to save the entry.

Family Member
Guardian Address

🔍 How To

Add Guardian Address

ℹ️ Note

- A "Guardian" refers to any person listed in the Family Member grid. If a "family" member is entered, even if it is a neighbor, the system considers these individuals to be "guardians". The term 'guardian' is not a legal distinction.

- Those entering addresses may not have addresses for all family members during entry.

Step / Action

1. Select the **Phone Numbers** panel.
2. Select the **Add** button.

🏠 Home / Child / Aaron, Aaron / Family / Family Member

Guardian Edit: EI Child ID - 47

Demographics

Family Member Information					
Phone Numbers	Rows per page 10 ▾				
Guardian Address	nary	Type	Okay To Text	Notes	Add
Guardian Secondary Languages		Cell	Yes		Edit
Family Member Notes		Prev **1** Next			

Family Member
Guardian Address

How To

Add Guardian Address

Step / Action

1. The **Edit Guardian Phone Number** dialogue box populates.
2. Add the family number phone number information.

Family Member
Guardian Address

🔍 How To

Add Guardian Address

ℹ️ Note

- A "Guardian" refers to any person listed in the **Family Member** grid. If a "family" member is entered, even if it is a neighbor, the system considers these individuals to be "guardians". The term 'guardian' is not a legal distinction.

- We do understand that those entering addresses may not have addresses for all family members at the time of entry.

Step / Action

1. Select the **Guardian Address** panel.
2. Select **Add.**

🏠 Home / Child / Aaron, Aaron / Family / Family Member

Guardian Edit: EI Child ID - 47

Demographics

	Family Member Information														
	Phone Numbers		Rows per page						10 ⌄					
	Guardian Address	tus	Start Date	End Date	Type	Address	Address 2	Address 3	City	Zip Code	County	State	Validation	Add
	Guardian Secondary Languages	ve	06/07/2023		Biological Parents	1221 W MONROE ST			DECATUR	46733-1532	Adams	IN	True	Edit
	Family Member Notes										Prev	1	Next	

Family Member
Guardian Address

How To

View and Add Guardian Addresses

Note

- The **Mask information** checkbox will hide the address on the IFSP.

- Place a checkmark in the box for **Family Outcome Survey** if this family member is a primary contact and has been selected to complete the survey.

- The Address is validated by USPS.

Step / Action

1. Select the **Address Type** (i.e., Biological Parents).
2. Select an **Address Status** (i.e., Active, Inactive).
3. Place a check mark if this family/individual should receive the **Family Outcome Survey**.
4. Select the **Address Priority** (i.e., Primary, Secondary).
5. Enter the **Address**.
6. Select the **Address Validate** button to have the address validated by USPS.
7. Select the **Submit** button to save the address entry.

Family Member
Guardian Secondary Languages

How To

Add a Secondary Language

Note

- Multiple languages can be selected for each guardian via the **Add** button as outlined in **Steps 1 through 4**.

Step / Action
1. Select the **Guardian Secondary Language** panel.
2. Select the **Add** button.
3. Add **Language** from the Language drop-down.
4. Select the **Submit** button to save your entry.

Family Member
Guardian Notes

🔍 How To

Add Guardian Notes

ℹ Note

- Add notes for a particular family member (i.e., notes regarding a non-custodial father/mother)

Step / Action
1. Select the **Family Member Notes**
2. Select the **Submit** button.

🏠 Home / Child / Aaron, Aaron / Family / Family Member

Guardian Edit: EI Child ID - 47

| Demographics |

| Family Member Information |
| Phone Numbers |
| Guardian Address |
| Guardian Secondary Languages |
| Family Member Notes |

Notes

[ ]

Submit

Family Edit
Parent Consent Detail Report

How To

Add, View, and Edit Parent Consent Detail Report

Step / Action

1. Select the **Family Info** tab**.** The Family panel populates along with the Family grid.
2. Locate the correct family from the Family Grid. Select the **Edit** button to edit the family record.
3. Select the **Parent Consent Detail Report** panel.
4. Select the **Add Parental Consent Detail** button to add a parental consent form (i.e., Parent Consent to Participation in Early Intervention, Parent Consent Revocation).
5. To view or edit an existing parental consent form, Select **Edit** from the **Parent Consent Detail** grid.

Family Edit
Parent Consent Detail Panel

How To

Complete Parental Consent Detail Panel

Note

- A checkmark in the **Parental Content** checkbox is an attestation that parents have signed the paper consent.
- Unnumbered fields may be completed as needed or as appropriate

Step / Action

1. Select **Consent Form Name** from the dropdown menu.
2. Select **Parent/Guardian** from the dropdown menu.
3. Enter a check mark in the **Parental Consent** checkbox to indicate parental content has been obtained.
4. Select **Submit** to save the entry.

Parental Consent Detail

Parent Consent Detail Panel

*Consent Form Name
Parental Consent to Participation in Early Intervention

*Parent/Guardian
Allison Aaron

Provider Name
Test | Tester | | (121) 287-6230 | testbox921@gmail.com

PHI Access
Obtain

Communicates
With parent/caretaker only

Provider Email from Record

Additional Email

Secondary Email

Provider Name Other

Provider Agreement Type Other

☑ Parental Consent
Consent Date
06/12/2023

Revocation Date

Submit

Family Edit
Family Member Search

How To

How to Link Children to a Family

Note

- The "Linking Children' function is used to add an **existing** child (sibling) in the EI program as a family member to a **newly enrolled** Child's record.

- Fields that have (Equal To) must contain the exact search criteria (the exact first name, last name or ID number etc.)

- **Child Statuses:**

    - **Active:** The Child's record is in active status within the Early Intervention Program.

    - **Closed:** The Child's record is closed (i.e., the Child may have been referred for services but deemed ineligible resulting in a close record).

    - **Duplicate**: The Child has a pre-existing record.

    - **Exited:** The Child has aged out of the Early Intervention Program.

Step / Action
1. Select the **Family Info tab.** The Family panel populates along with the Family grid.
2. Locate the correct family from the Family Gird. Select the **Edit** button to edit the family record.
3. Select the **Family Search** panel.
4. Enter search criteria for the child you wish to add to the family (i.e., Child status, First Name, Last Name)
5. Select the **Search** button to locate the child
6. Select the **Add to Family button** to add the child to the family.

Child at a Glance	Child Info	Family Info	Funding Sources	Eval Info	Eligibility	IFSP	Services	Child/Family Outcomes	Transition	Transfer, Exit, & Reopen	Document

Family
Contact Log

⊞ Family   -Default Report-

Add Family   Excel

Search...   Rows per page 10

Family ID	Start Date	End Date	Last Name	Homelessness	Military Family	Action
194	08/08/2023			Yes	Yes	Edit

Showing 1 to 1 of 1 entries   Prev 1 Next

Family

Family Member
Parent Consent Detail Report
Family Search
Family Base
Surrogate Parent Appointment
Family Cost Participation
Caseworker

⊞ Available Families   -Default Report-

Report Filters

Child Status (Equal To)	Child ID (Equal To)	First Name (Equal To)	Last Name (Equal To)
Active			

- Select Item -
Active
Closed
Duplicate
Exited

City (Equal To)	Zip (Equal To)	Date Of Birth (Equal To)

Search

Search...   Rows per page 10

Child ID	First Name	Last Name	Address	City	Zip	Date Of Birth	Family Member Type	Action
1	Test	WAEI				01/01/2022	Child (DNU)	Add To Family
10	saran	mike				02/08/2021		Add To Family

Family Edit
Family Member Search

How To

How to Link Children to a Family

Note

Once the child to link to the family populates, before selecting **Add to Family STOP –** ask yourself is this really the child to link –once a child is linked to a family, the child cannot be unlinked

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Family

| Family Member |
| Parent Consent Detail Report |
| Family Search |
| Family Base |
| Surrogate Parent Appointment |
| Family Cost Participation |
| Caseworker |

▦ Available Families   -Default Report- ▾ ⚙ ⤢ ▬

Report Filters

Child Status (Equal To)	Child ID (Equal To)	First Name (Equal To)	Last Name (Equal To)
Active ▾			

Dropdown:
- Select Item -
Active
Closed
Duplicate
Exited

City (Equal To)	Zip (Equal To)	Date Of Birth (Equal To)

Search

🔍 Search...   Rows per page 10 ▾

Child ID	First Name	Last Name	Address	City	Zip	Date Of Birth	Family Member Type	Action
1	Test	WAEI				01/01/2022	Child (DNU)	Add To Family
10	saran	mike				02/08/2021		Add To Family

Family Edit
Family Base

🔍 How To

View a Family Status

ℹ️ Note

- In the event the child's last name changes, users with certain access will be able to change the family base last name.

- Changing the child's last name will be done in the **Child Info** tab; however, the family base name must be updated within the Family Info tab.

- Use the **Transfer, Exit, & Re-Open** tab to change a child's status within the Early Intervention Program.

- Use the **Family Member** panel to change the status of a child's family members.

- When a Child's status changes to 'inactive', this also end dates the Child's family base.

- In the event the child's last name changes (i.e., if the child is adopted), users with certain access will be able to change the family base last name.

Family

Family Member	
Parent Consent Detail Report	
Family Search	
Family Base	
Surrogate Parent Appointment	
Family Cost Participation	

Start Date
06/07/2023

End Date
06/30/2023

Family Last Name
Aaron

*Homelessness
--- Select ---

*Military Family
--- Select ---

Submit

Family Edit
Surrogate Parent Appointment

How To

Entering and Viewing a Surrogate Parent Appointment

Note

- For the purpose of Early Support Services decisions only, the surrogate is one who "stands in place" of the parent.

- A Surrogate Parent can be removed by selecting the current Surrogate Parent from the **Surrogate Parent Appointed** drop-down, identifying the Surrogate Parent removal reason via the **Current Surrogate Parent Removal Reason** drop-down, uploading removal attestation documents and clicking the **Removal Attestation** checkbox.

Step / Action
1. Select the **Family Info tab.** The Family panel populates along with the Family grid.
2. Locate the correct family from the Family Gird. Select the **Edit** button to edit the family record.
3. Select the **Surrogate Parent Appointment** panel.
4. Select the **Add Surrogate Parent Appointment** button to add a Surrogate Parent.
5. Select the **Edit** button within the **Surrogate Parent Appointment** grid to view or edit the Surrogate Parent Appointment.

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer, Exit, & Reopen | Document |

Family
Contact Log

⊞ Family

Add Family

Search...

Rows per page 10

Family ID	Start Date	End Date	Last Name	Homelessness	Military Family	Action
194	08/08/2023			Yes	Yes	Edit

Showing 1 to 1 of 1 entries

Prev 1 Next

Family

Family Member
Parent Consent Detail Report
Family Search
Family Base
Surrogate Parent Appointment
Family Cost Participation
Caseworker

⊞ Surrogate Parent Appointment

Add Surrogate Parent Appointment

Excel

Search...

Rows per page 10

Surrogate Parent Appointed	Foster Care Agency	Appointment Reason	Appointment Effective Date	Removal Reason	Removal Effective Date	Action
James Moynihan-Test		Parent identifies requested surrogate parent.	09/08/2023			Edit

Showing 1 to 1 of 1 entries

Prev 1 Next

Family Edit
Surrogate Parent Appointment

How To

Entering a Surrogate Parent Appointment

Step / Action
1. After selecting the **Add Surrogate Parent Appointment** button, the **Surrogate Parent Appointment** pane populates. Proceed to select the **Surrogate Parent** from the **Surrogate Parent Appointment** drop-down menu.
2. Enter the Foster Care Agency name in the **Foster Care Agency** text entry box, if known.
3. Select Surrogate Parent Appointment Reason from the **Surrogate Parent Appointment Reason** drop-down menu.
4. Enter the date the Surrogate Appointment became effective into the **Surrogate Parent Appointment Effective Date** text entry box.
5. If the surrogate parent has been removed, select a removal reason and the date of removal.
6. Select the checkbox if the appointment is attested and signed or if the removal is attested and signed.
7. Select **Submit** button.

Surrogate Parent Appointment

Surrogate Parent Appointment

Surrogate Parent Appointed

James Moynihan-Test

Foster Care Agency

Surrogate Parent Appointment Reason

Parent identifies requested

*Surrogate Parent Appointment Effective Date

09/08/2023

☐ Is Appointment Attested And Signed

Current Surrogate Parent Removal Reason

--- Select ---

Surrogate Parent Removal Effective Date

☐ Is Removal Attested And Signed

Submit

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation – Contingent Upon Development

Step / Action

1. Select the **Family Info tab.** The Family panel populates along with the Family grid.
2. Navigate to the Family Member tab
3. Click the **Edit** button for the family you are entering Family Cost Participation for.
4. Navigate to the **Family Cost Participation** panel.
5. Click the **Add Family Cost Participation** button.

Child at a Glance	Child Info	Family Info	Funding Sources	Eval Info	Eligibility	IFSP	Services	Child/Family Outcomes	Transition	Transfer, Exit, & Reopen	Document

Family
Contact Log

▦ Family   -Default Report- ⚙ ⤢ ▬

Add Family   Excel

🔍 Search...   Rows per page 10 ⌄

Family ID	Start Date	End Date	Last Name	Homelessness	Military Family	Action
194	08/08/2023			Yes	Yes	Edit

Showing 1 to 1 of 1 entries   Prev **1** Next

Family

Family Member
Parent Consent Detail Report
Family Search
Family Base
Surrogate Parent Appointment
Family Cost Participation
Caseworker

▦ Family Cost Participation   -Default Report- ⚙ ⤢ ▬

Add Family Cost Participation   Excel

🔍 Search...   Rows per page 10 ⌄

FCP Status	Family Yearly Income	Family Yearly Payroll Deductions	Family Yearly Expenses	Family Size	Payment Option	CoPay Amount	Monthly Maximum	Effective Date	Action	End Date
No data available in table										

Showing 0 to 0 of 0 entries   Prev Next

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation – Contingent Upon Development

Step / Action
1. Upon selecting, "Add Family Cost Participation" the family cost participant screen defaults to the **Presumptive Inform Verification** panel.
2. Enter the **Child's Name.**
3. The **Child ID** and **Date of Birth** auto-populate.
4. Select if the **Child is in Foster Care or Relative Placement through DCYF**.
5. Select if the **Child is cared for by a relative or guardian outside of DCYF.**
6. Select if all **family members are enrolled in Medicaid**.
7. The status of the FCP will remain 'Pending' until all FCP-related panels have been saved and submitted.
8. Select the **Submit** button to save/submit your entry.

🏠 Home / Child / aaaaaaaaaaaa, aaaaaaaaaaa / Family / Family Cost Participation Add

Family Cost Participation

Cost Participation

- Presumptive Inform Verification
- Family Member Employment
- Family Expenses
- Family Cost Calculation

Child Name
aaaaaaaaaaa aaaaaaaaaaaa

First Steps Child Code
60

Date of Birth
05/30/2022

Is the child in foster care or relative placement through DCS?
N/A

Is the child cared for by a relative or guardian outside of DCS?
N/A

Does the family currently access any of the following services?
N/A ✕

Are all family members enrolled in Medicaid?
--- Select ---

FCP Status
Pending

Submit

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. Navigate to the **Family Members Employment and Insurance** Panel
2. Click the **Add Family Member Employment** button.

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. Navigate to the **Family Members Employment and Insurance** Panel
2. Click the **Add Family Member Employment** button.

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. Select from the dropdown the **family member** whom you are entering information for and their relationship to the child.
2. Select the **Type of insurance**: private, public (e.g., Medicaid), or none
3. Click the checkbox if the **family member refuses to give income information**.
4. Enter the name of the **family member's employer**.
5. Enter the **pay period end date** for the first pay period you are entering income information for.
6. Enter the **health insurance contribution** for the first pay period.
7. Enter the **dental insurance contribution** for the first pay period.
8. Enter the **vision insurance contribution** for the first pay period.
9. Enter the **pay period end date for the second pay period** you are entering income information for.
29. Enter **gross income for the second pay period**.

Family Member Employment

Family Employment

Enter each family member of the household (including child) and provide the requested information. Insurance information must be collected for the child.

Family Member Name

--- Select ---

Relationship to Child

--- Select ---

☐ Declined to provide income information

Name of Employer

Pay Period End Date 1

All members of the household (except the child) must provide 3 recent consecutive pay stubs, most recent tax document (W-2, 1040), signed statement from employer or signed statement from family. If collecting a signed statement, it must include income amount, frequency of income amount, and reason pay stubs or tax documents are not collected. Income should only be collected for families that do not meet requirements of presumptive income verification.

Income & Deductions Section

Gross Income 1

Health Insurance 1

Dental Insurance 1

Vision Insurance 1

Pay Period End Date 2

Gross Income 2

Family Edit
Family Cost Participation

How To

Step / Action

1. Enter the **health insurance contribution** for the second and third pay period.
2. Enter the **dental insurance contribution** for the second and third pay period.
3. Enter the **vision insurance contribution** for the second and third pay period.
4. Enter the **pay period end date for the third pay period** (the pay period for the second period has been entered on the previous page).
5. Enter **Any variation in documentation**.
6. Select the **Payroll Interval** (i.e., weekly, bi-weekly, monthly).
7. Select the **Health Deduction Interval** (i.e., weekly, bi-weekly, monthly).
8. Select the **Dental Deduction Interval** (i.e., weekly, bi-weekly, monthly).
9. Select the **Vision Deduction Interval** (i.e., weekly, bi-weekly, monthly).
10. Enter the **Member Total Yearly Income**.
11. Enter the **Total Yearly Deductions**.
12. Upload **Payroll Stub** documentation.
13. Select the **Submit** button to save/submit your entry

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. Enter the **health insurance contribution** for the second and third pay period.
2. Enter the **dental insurance contribution** for the second and third pay period.
3. Enter the **vision insurance contribution** for the second and third pay period.
4. Enter the **pay period end date for the third pay period** (the pay period for the second period has been entered on the previous page).
5. Enter **Any variation in documentation**.
6. Select the **Payroll Interval** (i.e., weekly, bi-weekly, monthly).
7. Select the **Health Deduction Interval** (i.e., weekly, bi-weekly, monthly).
8. Select the **Dental Deduction Interval** (i.e., weekly, bi-weekly, monthly).
9. Select the **Vision Deduction Interval** (i.e., weekly, bi-weekly, monthly).
10. Enter the **Member Total Yearly Income**.
11. Enter the **Total Yearly Deductions**.
12. Upload **Payroll Stub** documentation.
13. Select the **Submit** button to save/submit your entry

Health Insurance 2

Dental Insurance 2

Vision Insurance 2

Pay Period End Date 3

Gross Income 3 $

Health Insurance 3

Dental Insurance 3

Vision Insurance 3

Explain any variation in documentation

Payroll interval

--- Select ---

Health Deduction Interval

--- Select ---

Dental Deduction Interval

--- Select ---

Vision Deduction Interval

--- Select ---

Member Total Yearly Income

0.00

Member Total Yearly Deductions

0.00

Upload Payroll Stubs

Submit

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. You can now view the employment information for the family member on the grid on the **Family Members Employment** grid.

2. Repeat steps in this job aid to add additional employers and sources of income for family members.

🏠 Home / Child / Aaron, Aaron / Family / Family Cost Participation

Family Cost Participation

Cost Participation

- Presumptive Inform Verification
- Family Member Employment
- Family Expenses
- Family Cost Calculation

🔲 **Family Member Employment**   -Default Report- ⚙ ⤢ ▬

Add Family Member Employment   Excel

🔍 Search...   Rows per page 10 ▾

Family Member	Relationship to Child	Employer	Annual Income	Annual Deductions	Action
Allison Aaron	Mother		$0.00	$0.00	Edit

Showing 1 to 1 of 1 entries   Prev **1** Next

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. Navigate to the **Family Expenses** panel.
2. Enter total **Insurance Co-Payments** for the family.
3. Enter the total **Dental and Vision Expenses** for the family.
4. Enter total **Hospital Expenses** for the family.
5. Enter the total **Prescription Expenses** for the family.
6. Enter expenses related to **Nutritional Supplements that were Ordered by a physician**.
7. Enter expenses for **Durable Medical Equipment/Assistive Technology/Adaptations**.
8. Enter expenses for **Specialized Clothing Required per a Medical Condition**.
9. Enter expenses for **Specialized Respite Care or Childcare above Typical Costs**.
10. Enter expenses for **Medical Transportation**.
11. Enter any other **Related Medical Costs**.
12. Enter any other **Related Personal Care Needs Expenses Relating to a Medical Condition**.
13. Confirm total family expenses have been calculated correctly.
14. Click the checkbox if the family is not claiming any deductions.
15. Click the **Upload Expenses** button to attach any documentation of these expenses
16. Click **submit** to save/submit the entry.

Family Member Employment

Family Expenses

Family Cost Calculation

Medical Expenses Out of Pocket: medical/healthcare expense from the previous twelve (12) months is which the family has not, nor will not be reimbursed

Personal Care Needs Expenses: Out of pocket expenses from the previous twelve (12) months that are related to the health or medical needs, for which the family has not, nor will not be reimbursed

Deductions must be directly related to the health or medical conditions of a family member. Expenses must be out of pocket expenses from the previous twelve (12) months and those for which the family will not be reimbursed. **Documentation of expenses must be present.**

☐ No Deductions are Being Claimed

Insurance Co-Payments
0.00

Dental and Vision Expenses
0.00

Hospital Expenses
0.00

Prescriptions
0.00

Nutritional Supplements as Ordered by a Physician
0.00

Durable Medical Equipment/Assistive Technology/Adaptations
0.00

Specialized Clothing as Required per Medical Condition
0.00

Specialized Respite Care or Childcare above that of Typical Costs
0.00

Medical Transportation Costs
0.00

Other Related Medical Costs (Attach List)
0.00

Other Related Personal Care Needs Expenses Relating to Medical Condition
0.00

Total Family Expenses
0.00

Upload Expenses

Submit

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Note

- **IMPORTANT!** You must click the Calculate Now button before the family member signs the FCP record. This ensures the FCP calculation is correct.

- Also, be sure to update the FCP when family member information changes.

- Clicking the Print FCP button will generate a completed and signed cost participation form detailing the parameters of the family's cost participation in First Steps.

Step / Action

1. Navigate to the **Family Cost Calculation** panel.
2. Review income, expenses, and family size data to confirm the details have been calculated correctly.
3. Click the **Calculate Now** button.
4. The Copay, payment option, and family monthly maximum will automatically calculate; confirm this information is correct.
5. Enter the date this cost participation goes into effect; the end date will be added when a new cost participation has been entered
6. Click the **Parent/Guardian Sign** button to digitally capture the family and service coordinator signatures through Docusign.
7. Click the **Print FCP** button to download a completed and signed PDF document for the family's cost participation
8. Click Submit to save/submit the entry.

Family Edit
Family Cost Participation

How To

Entering a Family Cost Participation

Step / Action

1. Once all FPC panels are completed and submitted, the FCP becomes 'Active'. The completed family cost participation is now viewable on the **Family Cost Participation panel** in the grid that displays.

Revision History

Version Number	Release Date	Author	Revision Summary
v.1	4.025.2022	Donna	First Draft Release
v.2	6.7.2023	Courtney	Second Draft Release
v.3	8.7.23	Courtney	Third Release