



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.



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.**

The screenshot displays a software interface for managing family information. On the left is a navigation menu with options: Home, Child, Therapist, Provider, Doctor, Attendance, Billing, Enrollment, Maintenance, Security, and Help (option 1). The main content area is titled "First Steps ID: 47 - Aaron, Aaron - DOB: 6/7/2020". It features a sub-menu with "Family" and "Contact Log". The "Family" sub-menu is active, showing a table with one entry for Family ID 47, Start Date 06/07/2023, Last Name Aaron, and an "Edit" button. The table also includes columns for Homelessness and Military Family. A search bar and "Add Family" button are visible above the table. The interface also shows "Rows per page" set to 10 and "Showing 1 to 1 of 1 entries".

Family ID	Start Date	End Date	Last Name	Homelessness	Military Family	Action
47	06/07/2023		Aaron			Edit



Edit Family

Add Family Members

How To

Add a Family Member

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.

continued on next page...

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- [Settings] [Share] [Close]

Add Family [Excel]

Search...

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



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.

The screenshot shows a web form titled "Demographics" with a sub-section for "Family Member Information". The form contains the following fields and options:

- Mask Information
- *Family Member Type: Mother (dropdown)
- *Family Status: Active (dropdown)
- EI Child ID: 47
- Start Date: 06/07/2023
- End Date: (empty)
- Salutation: --- Select --- (dropdown)
- *First Name: Allison
- Middle Name: (empty)
- *Last Name: Aaron
- Suffix: --- Select --- (dropdown)
- Sex: Female (dropdown)
- Birth Date: 03/11/1988
- *Contact Type: Primary Contact (dropdown)
- Email Address: allisonaaron@gmail.com
- Marital Status: Married (dropdown)
- *Dominant Language: English (dropdown)
- Multilingual (If checked, please complete Secondary Language selection(s))
- Interpreter Needed
- Written Translation Needed
- Education: Master's degree or Above (dropdown)
- Provide Transportation
- Household Size: 4 (dropdown)
- Permission To Always Contact
- Notes: (text area)
- Insures Child
- Submit button



Family Member Guardian Address

How To

Add Guardian Address



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
- Guardian Address
- Guardian Secondary Languages
- Family Member Notes

Rows per page 10

Primary	Type	Okay To Text	Notes	
	Cell	Yes		Add
				Edit

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.

The screenshot shows a web application interface with a sidebar on the left containing navigation items: Home, Child, Therapist, Provider, Doctor, Attendance, Billing, Enrollment, Maintenance, and Security. The main content area displays a modal dialog box titled "Edit Guardian Phone Number". The dialog box contains the following fields and controls:

- *Phone Number Type: A dropdown menu with "Cell" selected.
- *Phone Number: A text input field containing "(555)-555-5555".
- Is Primary Phone?: A checked checkbox.
- Okay To Text: A dropdown menu with "Yes" selected.
- Notes: A text input field.
- Submit and Cancel buttons at the bottom right.

The background shows a partially visible "Edit Form" button and a footer with the text "© 2023 PCG Human Services | 0.0.3.0".



Family Member Guardian Address

How To

Add Guardian Address

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

Guardian Address

Guardian Secondary Languages

Family Member Notes

Rows per page 10

Start Date	End Date	Type	Address	Address 2	Address 3	City	Zip Code	County	State	Validation	Add
06/07/2023		Biological Parents	1221 W MONROE ST			DECATUR	46733-1532	Adams	IN	True	Edit

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.

Edit Guardian Address

Mask Information

*Address Type
Biological Parents

*Address Status
Active

*Start Date
06/07/2023

End Date

List of Child Addresses to Copy - Select a Child Address -

Receive Family Outcome Survey?

*Address Priority
Primary

*Address Line 1
1221 W MONROE ST

Address Line 2

Address Line 3

*Zip Code
46733-1532

City/Town
DECATUR

Address State
WA

Address County
Adams

Address has been Validated [Address Validate](#) [City / State / Zip Lookup](#)

[Submit](#) [Cancel](#)



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.

The screenshot shows the 'Guardian Edit: El Child ID - 47' page. The 'Guardian Secondary Languages' panel is selected, displaying a table with columns for 'Secondary Language', 'Added By', and 'Modified By'. An 'Add' button is visible in the top right corner of the table. The table currently contains no data, with the message 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

The screenshot shows the 'Add Guardian Secondary Language' modal form. The form has a dropdown menu for '*Language' with the option '-- Select --'. There are 'Submit' and 'Cancel' buttons at the bottom right of the modal. The background shows the 'Guardian Secondary Languages' panel from the previous screenshot, with the 'Add' button highlighted.



Family Member *Guardian Notes*

How To

Add Guardian Notes



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

A screenshot of a web application interface for editing guardian information. The breadcrumb trail at the top reads 'Home / Child / Aaron, Aaron / Family / Family Member'. Below this, the page title is 'Guardian Edit: EI Child ID - 47'. The main content area features a sidebar with a list of tabs: 'Demographics', 'Family Member Information', 'Phone Numbers', 'Guardian Address', 'Guardian Secondary Languages', and 'Family Member Notes'. The 'Family Member Notes' tab is currently selected and highlighted. The main panel displays a large, empty text input field labeled 'Notes'. A purple 'Submit' button is located at the bottom right of the text area.

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

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

Excel

Parental Consent Detail

Consent Form Name Parent Or Guardian Name PHI Access Parental Consent Consent Date Revocation Date Action

Parental Consent to Participation in Early Intervention	test test	Obtain	True	09/07/2023		Edit
---	-----------	--------	------	------------	--	------

Showing 1 to 1 of 1 entries

Prev 1 Next

Excel

Family Edit

Parent Consent Detail Panel

How To

Complete Parental Consent Detail Panel

Note

- A checkmark in the **Parental Consent** 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.

The screenshot shows a web form titled "Parental Consent Detail". The form is divided into two main sections: a left sidebar and a main content area. The sidebar contains a tab labeled "Parent Consent Detail Panel". The main content area contains the following fields:

- *Consent Form Name:** A dropdown menu with the selected value "Parental Consent to Participation in Early Intervention".
- *Parent/Guardian:** A dropdown menu with the selected value "Allison Aaron".
- Provider Name:** A text field containing "Test | Tester | | (121) 287-6230 | testbox921@gmail.com".
- PHI Access:** A dropdown menu with the selected value "Obtain".
- Communicates:** A dropdown menu with the selected value "With parent/caretaker only".
- Provider Email from Record:** An empty text field with a pencil icon for editing.
- Additional Email:** An empty text field with a pencil icon for editing.
- Secondary Email:** An empty text field with a pencil icon for editing.
- Provider Name Other:** An empty text field with a pencil icon for editing.
- Provider Agreement Type Other:** An empty text field with a pencil icon for editing.
- Parental Consent:** A checkbox that is checked.
- Consent Date:** A text field containing "06/12/2023" with a pencil icon for editing.
- Revocation Date:** An empty text field with a pencil icon for editing.

A purple "Submit" button is located at the bottom right of the form.



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 Grid. 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.

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

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**

The screenshot displays the 'Family Edit' interface. On the left is a navigation menu with options: Family Member, Parent Consent Detail Report, Family Search (highlighted), Family Base, Surrogate Parent Appointment, Family Cost Participation, and Caseworker. The main area is titled 'Available Families' and includes a report filter section with fields for Child Status (Equal To), Child ID (Equal To), First Name (Equal To), Last Name (Equal To), City (Equal To), Zip (Equal To), and Date Of Birth (Equal To). A 'Search' button is located at the bottom right of the filter section. Below the filters is a table with columns: Child ID, First Name, Last Name, Address, City, Zip, Date Of Birth, Family Member Type, and Action. The table contains two rows of data.

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

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 Grid. 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.

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

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



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.

The screenshot shows a web application interface for entering a Surrogate Parent Appointment. The form is titled "Surrogate Parent Appointment" and is contained within a pane of the same name. The form fields are as follows:

- Surrogate Parent Appointed:** A dropdown menu with "James Moynihan-Test" selected.
- Foster Care Agency:** A text entry box with a pencil icon for editing.
- Surrogate Parent Appointment Reason:** A dropdown menu with "Parent identifies requested" selected.
- *Surrogate Parent Appointment Effective Date:** A text entry box with "09/08/2023" entered and a pencil icon for editing.
- Current Surrogate Parent Removal Reason:** A dropdown menu with "--- Select ---" selected.
- Surrogate Parent Removal Effective Date:** A text entry box with a pencil icon for editing.
- Is Appointment Attested And Signed:** An unchecked checkbox.
- Is Removal Attested And Signed:** An unchecked checkbox.
- Submit:** A purple button located at the bottom right of the form.



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.

The screenshot shows a web application interface for adding family cost participation. The breadcrumb trail at the top reads: Home / Child / aaaaaaaaaa, aaaaaaaaaa / Family / Family Cost Participation Add. The main heading is "Family Cost Participation". On the left, there is a sidebar with four panels: "Cost Participation" (selected), "Presumptive Inform Verification", "Family Member Employment", "Family Expenses", and "Family Cost Calculation". The main content area contains the following fields:

- Child Name: aaaaaaaaaa aaaaaaaaaa
- 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

A purple "Submit" button is located at the bottom right of the form.



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.

The screenshot shows a web application interface for "Family Cost Participation Add". The breadcrumb trail is: Home / Child / aaaaaaaaaa, aaaaaaaaaa / Family / Family Cost Participation Add. The main content area is titled "Family Cost Participation" and contains a sidebar with navigation options: "Cost Participation", "Presumptive Inform Verification", "Family Member Employment", "Family Expenses", and "Family Cost Calculation". The "Family Member Employment" section is active, displaying a green header with a grid icon, the text "Family Member Employment", a "-Default Report-" dropdown, and icons for settings, refresh, and close. Below the header is an orange "Add Family Member Employment" button and a search input field. A table with columns "Family Member", "Relationship to Child", "Employer", "Annual Income", "Annual Deductions", and "Action" is shown, but it contains no data. The table footer indicates "Showing 0 to 0 of 0 entries" and includes "Prev" and "Next" navigation buttons.



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.

The screenshot displays a web application interface for managing family member employment. On the left, a sidebar menu includes 'Cost Participation', 'Presumptive Inform Verification', 'Family Member Employment', 'Family Expenses', and 'Family Cost Calculation'. The main content area is titled 'Family Member Employment' and features a green header bar with a '-Default Report-' dropdown, a settings icon, and a refresh icon. Below the header, there is an orange 'Add Family Member Employment' button and a green 'Excel' button. A search bar with a magnifying glass icon and the text 'Search...' is present. To the right of the search bar is a 'Rows per page' dropdown menu set to '10'. Below these elements is a table with the following columns: 'Family Member', 'Relationship to Child', 'Employer', 'Annual Income', 'Annual Deductions', and 'Action'. The table currently contains no data, with the text 'No data available in table' displayed. At the bottom of the table area, it says 'Showing 0 to 0 of 0 entries' and includes 'Prev' and 'Next' navigation buttons.



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

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

The screenshot displays a web form for entering family cost participation. The form is organized into several sections with input fields and dropdown menus. Each field has a small edit icon (pencil) to its right. The fields are: 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 (dropdown menu with '--- Select ---'), Health Deduction Interval (dropdown menu with '--- Select ---'), Dental Deduction Interval (dropdown menu with '--- Select ---'), Vision Deduction Interval (dropdown menu with '--- Select ---'), Member Total Yearly Income (input field with value 0.00), and Member Total Yearly Deductions (input field with value 0.00). At the bottom of the form, there is a blue button labeled 'Upload Payroll Stubs' and a purple button labeled 'Submit'.



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

The screenshot displays a web form for entering family cost participation. The form is organized into several sections with input fields and dropdown menus. Each input field has a small edit icon (pencil) on the right side. The fields are as follows:

- Health Insurance 2: Text input field.
- Dental Insurance 2: Text input field.
- Vision Insurance 2: Text input field.
- Pay Period End Date 3: Text input field.
- Gross Income 3 \$: Text input field.
- Health Insurance 3: Text input field.
- Dental Insurance 3: Text input field.
- Vision Insurance 3: Text input field.
- Explain any variation in documentation: Text input field.
- Payroll interval: Dropdown menu with "Select" option.
- Health Deduction Interval: Dropdown menu with "Select" option.
- Dental Deduction Interval: Dropdown menu with "Select" option.
- Vision Deduction Interval: Dropdown menu with "Select" option.
- Member Total Yearly Income: Text input field containing "0.00".
- Member Total Yearly Deductions: Text input field containing "0.00".

At the bottom of the form, there is a blue button labeled "Upload Payroll Stubs" and a purple button labeled "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.

The screenshot shows a web application interface for "Family Cost Participation". The breadcrumb trail is "Home / Child / Aaron, Aaron / Family / Family Cost Participation". The page title is "Family Cost Participation". On the left, there is a sidebar menu with options: "Cost Participation" (selected), "Presumptive Inform Verification", "Family Member Employment", "Family Expenses", and "Family Cost Calculation". The main content area is titled "Family Member Employment" and includes a search bar, a "Rows per page" dropdown set to 10, and an "Excel" button. Below the search bar is a table with one entry for Allison Aaron, Mother, with Annual Income of \$0.00 and Annual Deductions of \$0.00. The table has columns for Family Member, Relationship to Child, Employer, Annual Income, Annual Deductions, and Action. The Action column contains an "Edit" button. At the bottom of the table, it says "Showing 1 to 1 of 1 entries" and has "Prev", "1", and "Next" navigation buttons.

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



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.

Verification	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
Family Member Employment	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
Family Expenses	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.
Family Cost Calculation	<input type="checkbox"/> 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 
	<input type="button" value="Upload Expenses"/>
	<input type="button" value="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.

The screenshot shows a web form for 'Family Cost Calculation'. On the left is a navigation menu with options: 'Presumptive Inform Verification', 'Family Member Employment', 'Family Expenses', and 'Family Cost Calculation' (which is highlighted). The main form area contains several input fields, each with a pencil icon for editing: 'Total Family Yearly Income' (0.00), 'Total Family Yearly Payroll Deductions' (0.00), 'Total Family Expenses' (0.00), 'Family Size' (0), 'Total Deductions' (0.00), 'Adjusted Income' (0.00), 'Effective Date' (empty), 'CoPay Amount' (0.00), 'Payment Option' (empty), 'Family Monthly Maximum' (0.00), 'Percent of poverty' (0.00 %), and 'End Date' (empty). A large blue 'Calculate Now' button is positioned below the 'Effective Date' field. Below the form are two checked checkboxes with consent text: 'My service coordinator has explained my cost participation rights and responsibilities under Part C of the Individuals with Disabilities Education Act (IDEA)...' and 'By signing, I consent to the above selection and copayment calculation.' Below these are three buttons: 'Parent/Guardian Sign', 'Print FCP', and 'Custom PDF Mapping'. At the bottom right, there is an 'Upload' button and a purple 'Submit' button.



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.

The screenshot displays the 'Edit Family' interface. At the top, there is a breadcrumb trail: Home / Child / Aaron, Aaron / Family. Below this, the page title is 'Edit Family'. A sidebar on the left contains a menu with the following items: Family Member, Parent Consent Detail Report, Family Search, Family Base, Surrogate Parent Appointment, and Family Cost Participation (which is highlighted). The main content area features a green header bar with 'Family Cost Participation' and a '-Default Report-' dropdown. Below the header is a yellow 'Add Family Cost Participation' button and a green 'Excel' button. A search bar is present with the text 'Search...'. To the right of the search bar is a 'Rows per page' dropdown set to '10'. The main data is presented in a table with the following columns: FCP Status, Family Yearly Income, Family Yearly Payroll Deductions, Family Yearly Expenses, Family Size, Payment Option, CoPay Amount, Monthly Maximum, Effective Date, and Action. The table contains one row with the following values: Active, \$0.00, \$0.00, \$0.00, 0, (empty), \$0.00, \$0.00, 06/13/2023, and Edit/Delete buttons. Below the table, it says 'Showing 1 to 1 of 1 entries' and has 'Prev', '1', and 'Next' navigation buttons.

FCP Status	Family Yearly Income	Family Yearly Payroll Deductions	Family Yearly Expenses	Family Size	Payment Option	CoPay Amount	Monthly Maximum	Effective Date	Action
Active	\$0.00	\$0.00	\$0.00	0		\$0.00	\$0.00	06/13/2023	Edit Delete



Thank you!



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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

