

## File Naming for Uploading Files in *EarlySteps Online*

Attention Early Interventionists:

With the rollout of the updated data system, *EarlySteps Online*, SPOEs, FSCs and providers will be able to upload documents pertinent to the child's file directly into the child's record. The documents will be viewable by anyone with access to the specific child's record. Over time, this could result in numerous documents to sort through. To make it easier to locate specific documents, EarlySteps is requiring the following file naming rules.



For the File name:


1. Use month/year first. Abbreviate months using 3 letters (JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC). Month should refer to the month the meeting was held, contact with child family occurred, BDI-2 given, etc. Example, On April 3<sup>rd</sup>, you are uploading paperwork for an annual IFSP that was completed March 28<sup>th</sup>. The name of your file should be: **MAR2017**-JR-Annual IFSP
2. Next, add the child's initials: MAR2017-**JR**--Annual IFSP
3. Next, add the type of Document to be uploaded by each discipline: MAR2017-JR-**PT**-ContactNote  
Next add the type of Document: MAR2017-JR-PT-**ContactNote** Samples include:
  - a. SPOE: Initial Family Assessment (CPR), Initial IFSP, Team Meeting Minutes
  - b. FSC: IFSP-- Annual, Revision-Review, Annual CPR, Team Meeting Minutes,
  - c. Evaluator: IFSP Planning/Evaluation Report, front page of BDI2 (from booklet), IFSP page Section 3b
  - d. Provider: Monthly Progress Report/Contact Notes, single domain assessment reports

A good "rule of thumb" is to consider documents initiated/produced by an IFSP team member that is appropriate for viewing by all team members. Third party documents (those from outside EarlySteps) are not appropriate for uploading. Complete test protocols are not suitable for upload, only the BDI cover sheet, for example, for evaluations or an evaluation report for single domain assessments instead of the test protocol.

Examples of a child's file uploads using sample child initials, JR:

- JAN2017-JR- IFSP Planning Report-BDI2
- JAN2017-JR-CPR-EligibilityTeamMin
- JAN2017-JR-InitialIFSP
- FEB2017-JR-SLP ContactNotes
- MAR2017-JR-PT-MonthlyReport
- MAR2017-JR-FSC-QuarterlyReport
- APR2017-JR-Quarterly-TeamMeetingMin
- MAY2017-JR-SLPContact Notes-MonthlyReport
- JUL2017-JR-6Month IFSPReview-TeamMeeting
- JUL2017-JR-TeamDecisionForm
- NOV2017-JR-AnnualCPR
- NOV2017-JR-Annual Eval-BDI2
- DEC2017-JR-Annual EligTeamMeetingMin
- DEC2017-JR-Annual IFSP

When a file is uploaded, team members should notify the FSC who will have the responsibility to notify the team members that new child information is available.

 New Feature added to *EarlySteps Online*: **Team Notes**- a new feature allowing team members for a specific child to add information that is relevant for the entire team. There are character size limits for the notes feature, so notes should be short and to the point.

Examples of appropriate items to post:

- “Child” at grandmother’s house on Tuesdays
- “Child” changing to a new child care center next week, ABC Child Care, Address, Phone
- Physical Therapy changing to Thursday at 3:00, weekly
- Family on vacation until May 1

Examples of items not appropriate for posting in the team notes:

- X Legal situations regarding the family—“domestic violence history with father”
- X Home conditions—“drugs in the neighborhood”
- X Anything required in an EarlySteps form—examples—notices, meeting notes, authorization requests—these are posted as documents, not to be included in this **Team Notes** feature.

A good rule of thumb regarding this feature is to answer the questions—Is this related to service delivery on the IFSP? Is this better discussed by phone?

Using the **Team Notes** feature

- Anyone with access to the specific child’s record can add a note and view a note.
- The early interventionist who posted the note may delete the note.
- A system administrator will delete inappropriate notes.