Family Base/Family Member
Updated 2/14/23

DRAFT

How To

1. Add a Family Member to a Family Base
2. Complete a Parent Consent Detail Report
3. Add/Remove a Surrogate Parent Appointment
4. Conduct a Family Member Search and Link Siblings
5. View a Family Status from the Family Base
6. Locate Caseworker Information (Legacy Data)
7. View a Family's Contact Log

PUBLIC CONSULTING GROUP

early intervention shaping futures

NYS EI-Hub EARLY INTERVENTION SOLUTION

Solutions that Matter

Edit Family

Add Family Members

How To

Add a Family Member(s) to the Family Member Grid

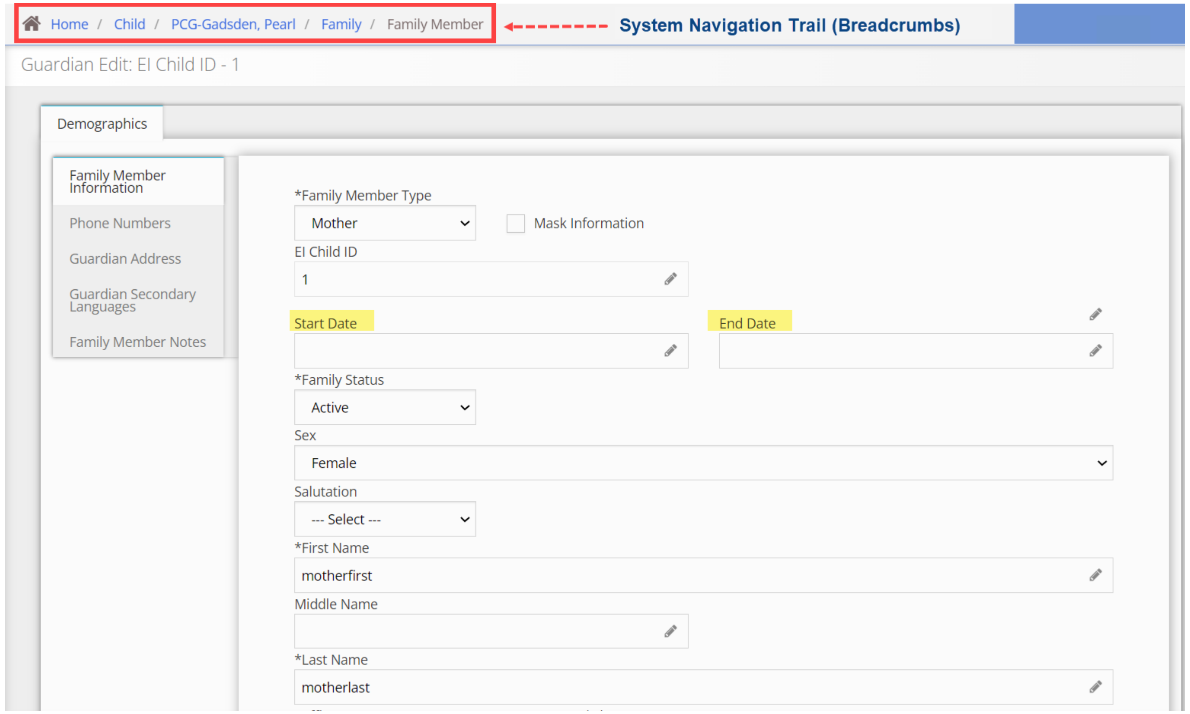
Step / Action

1. After selecting **Edit** to add family member(s), the **Edit Family** pane populates.
2. The **Family Member** panel displays within the **Edit Family** pane.
3. Select the **Add Family Members** button.

continued on next page…

Note

- The Family Member grid houses new and existing members within the **Family Member** grid.
- Information entered into the **Family Member Information** panel will auto-populate in subsequent areas such as the **Parental Consent Detail** grid (highlighted later in this document).
- **Family Member Types** such as a Surrogate Parent or Legal Guardian can be added and/or made inactive by adding an end date within the **Family Member Information** panel.
- Surrogate parents must be part of the **Family Panel** before they can be appointed to the **Surrogate Parent Appointment Tab/Panel**
- If a family member is no longer relevant, **end date the family member and DO NOT DELETE**



Add Family Member

Family Member Information

How To

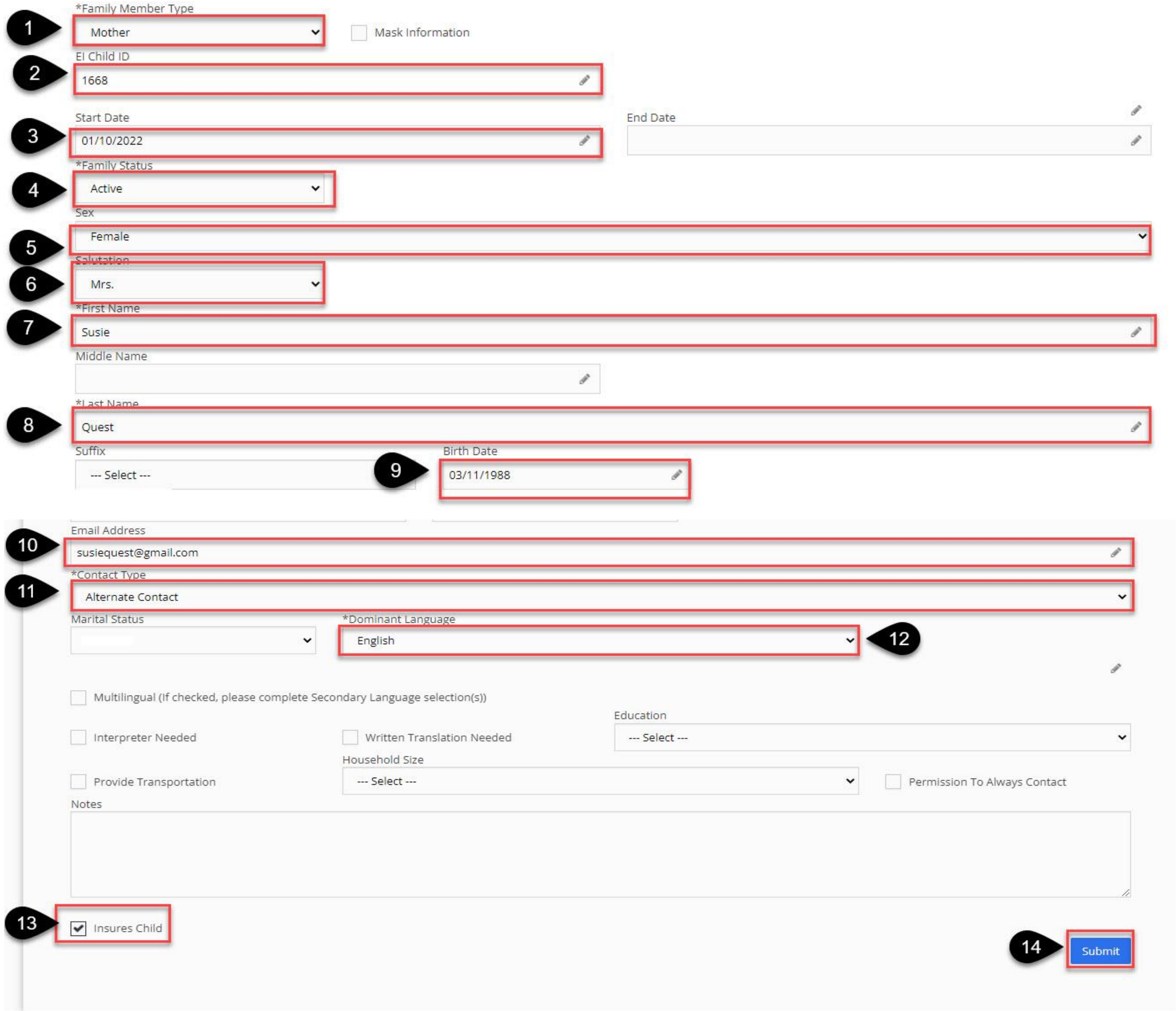
Add Individual Family Members to a Family

Step / Action

1. Select **Family Member Type** drop-down**.**
2. **Child ID** will automatically auto-populate.
3. Enter **Start Date**. (*Date family information is entered)*
4. Select **Family Status**.
5. Enter **Family Member Sex**.
6. Select **Salutation**.
7. Enter **Family Member First Name**.
8. Enter **Family Member Last Name**.
9. Enter **Family Member Birth Date**.
10. Enter **Family Member Email Address**.
11. Enter **Family Member Contact Type**.
12. Enter **Family Member Dominant Language**.
13. Enter a *check mark* if the **Family Member Insures the Child**.
14. Select **Submit**.

Note

- Not all roles will be able to add a family member.
- There can only be one primary contact at a time.
- A family member is ANYONE who will have contact with the child (i.e., grandmother, day care provider, surrogate parent, foster parent, etc.)
- An asterisk (*) indicates a required field.
- The "Mask Information" feature allows a user to "hide" or "mask" specific information on printed material. For example, the Mask feature may be selected for a particular family member when certain Child information may need to be hidden from that family member - such as the address of the Child's foster home.
- The checkmark in the **Insures Child** checkbox will populate in the **Insurance Info** tab.
- **If family base name is changed, relevant individual family members must be re-added to the updated child profile**



Family Member
Phone Numbers

How To

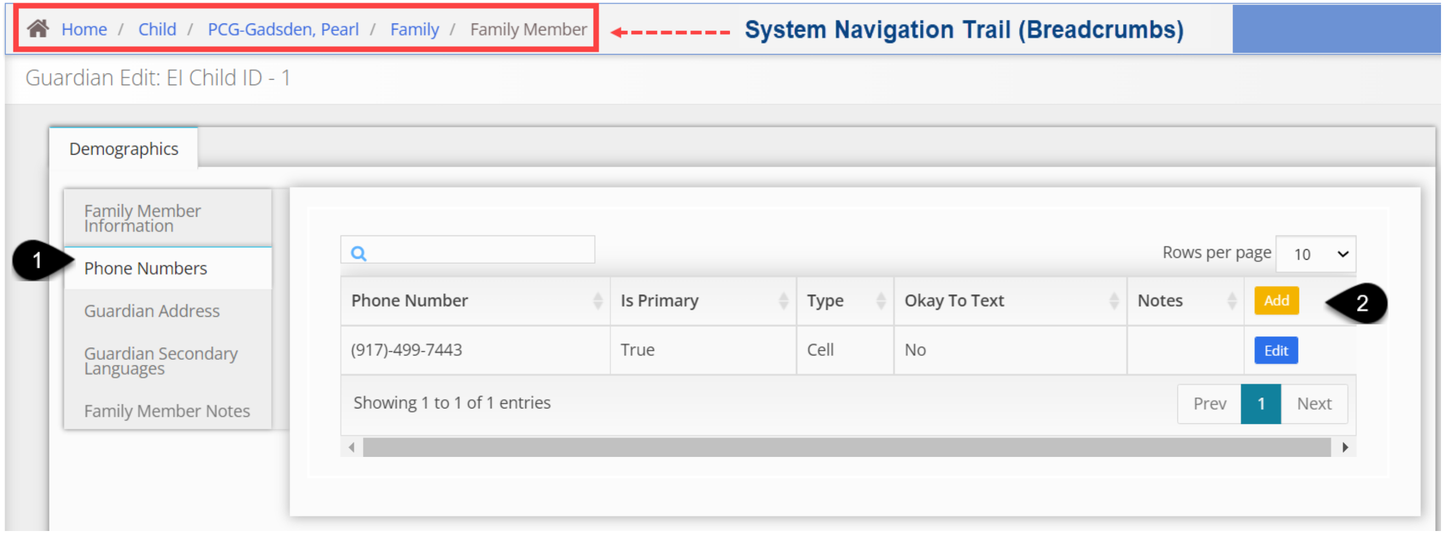
Add Phone Numbers

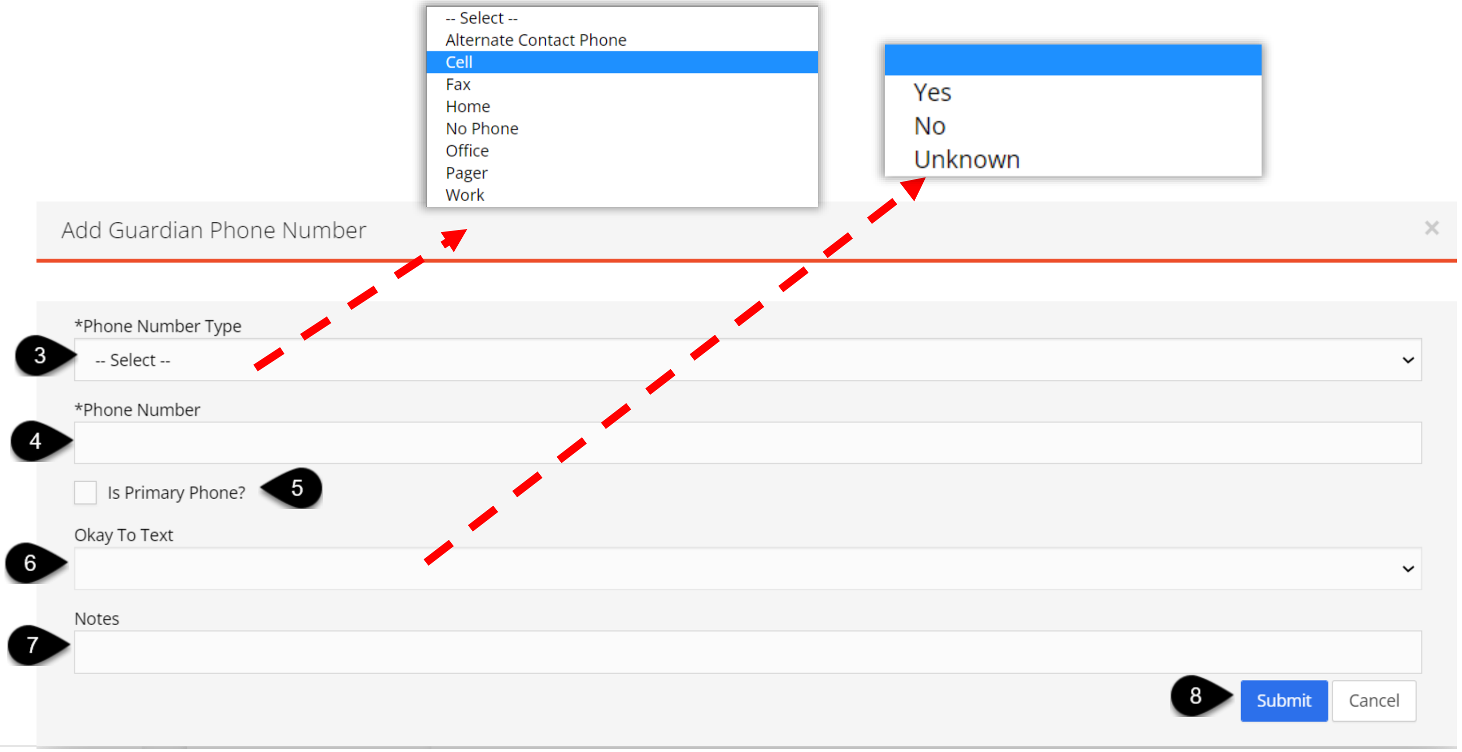
Step / Action

1. After adding a Family Member, select the **Phone Numbers** panel. The **Phone Number** grid populates.
2. Select the **Add** button.
3. Select the **Phone Number Type (i.e., cell, home, office)** from the **Phone Number** drop-down.
4. Enter the **Phone Number** into the **Phone Number** text entry box.
5. Click the **Primary Number** checkbox if the number entered is the family member's primary number.
6. From the **Okay To Text** drop-down**,** select if the family member wishes to receives text messages. (This is only available if phone number type is a cell phone.)
7. Add any notes regarding contacting the Family Member via the **Add Notes** text entry box.
8. Select the **Submit** button to add the newly entered phone number to the **Phone Number** grid**.**

Note

Existing phone numbers may be edited by selecting **Edit**.





Family Member

Guardian Address

How To

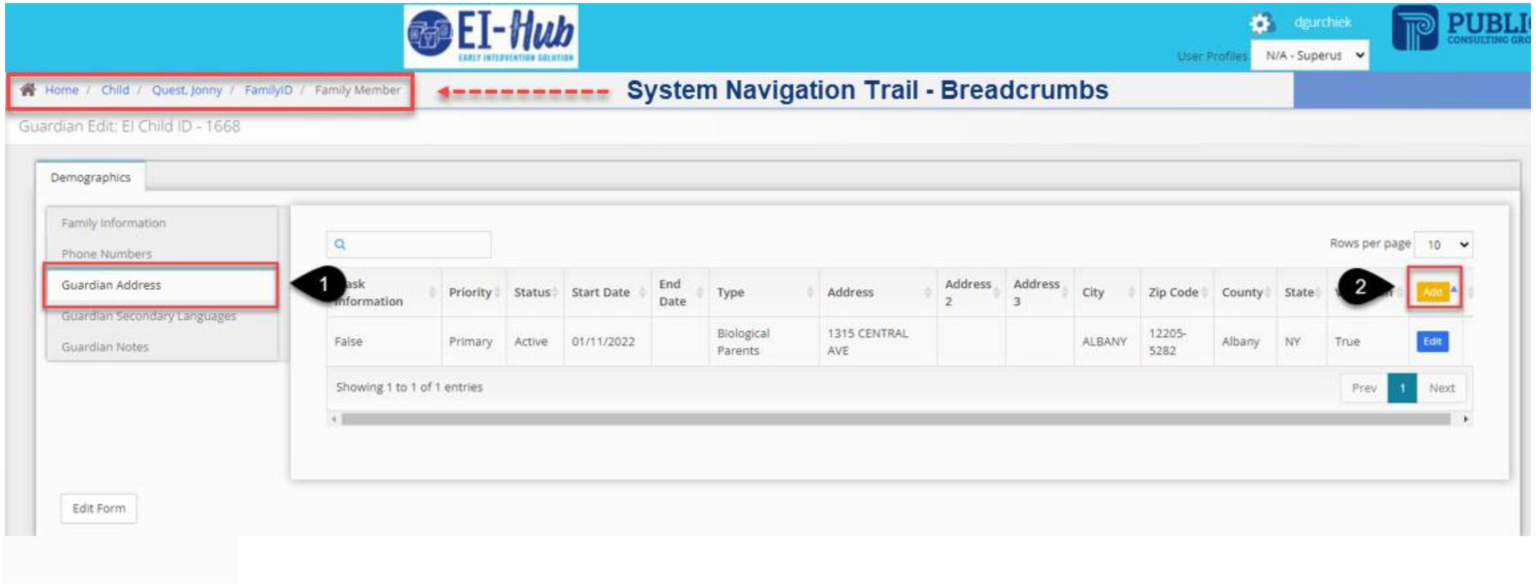
Add Guardian Address

Step / Action

1. Select ***Guardian Addresses** panel.
2. Select **Add** button.

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.
- **Addresses are not required or may be left blank for some family members.**
- The Guardian address auto-populates to the current date;
- Start date of address can be overwritten/backdated, if new address is selected as primary a popup will ask if it should be changed to secondary. Validation prevents two primary addresses.
- If no longer an active address the service coordinator should end date the address and add new address.



Family Member
Guardian Address

How To

View and add Guardian Addresses

Step / Action

1. Select **Address Type.**
2. Select **Address Type** from the drop-down menu.
3. Select **Address Status**.
4. Select **Address Status** from the drop-down menu.
5. *If guardian address is same as the child address, you may select an address from the **List of Child Addresses** drop-down menu*
6. **Place a check mark for each family member that should receive the Family Outcome Survey*****
7. Select **Address Priority** from the drop-down menu.
8. Enter **Address**.

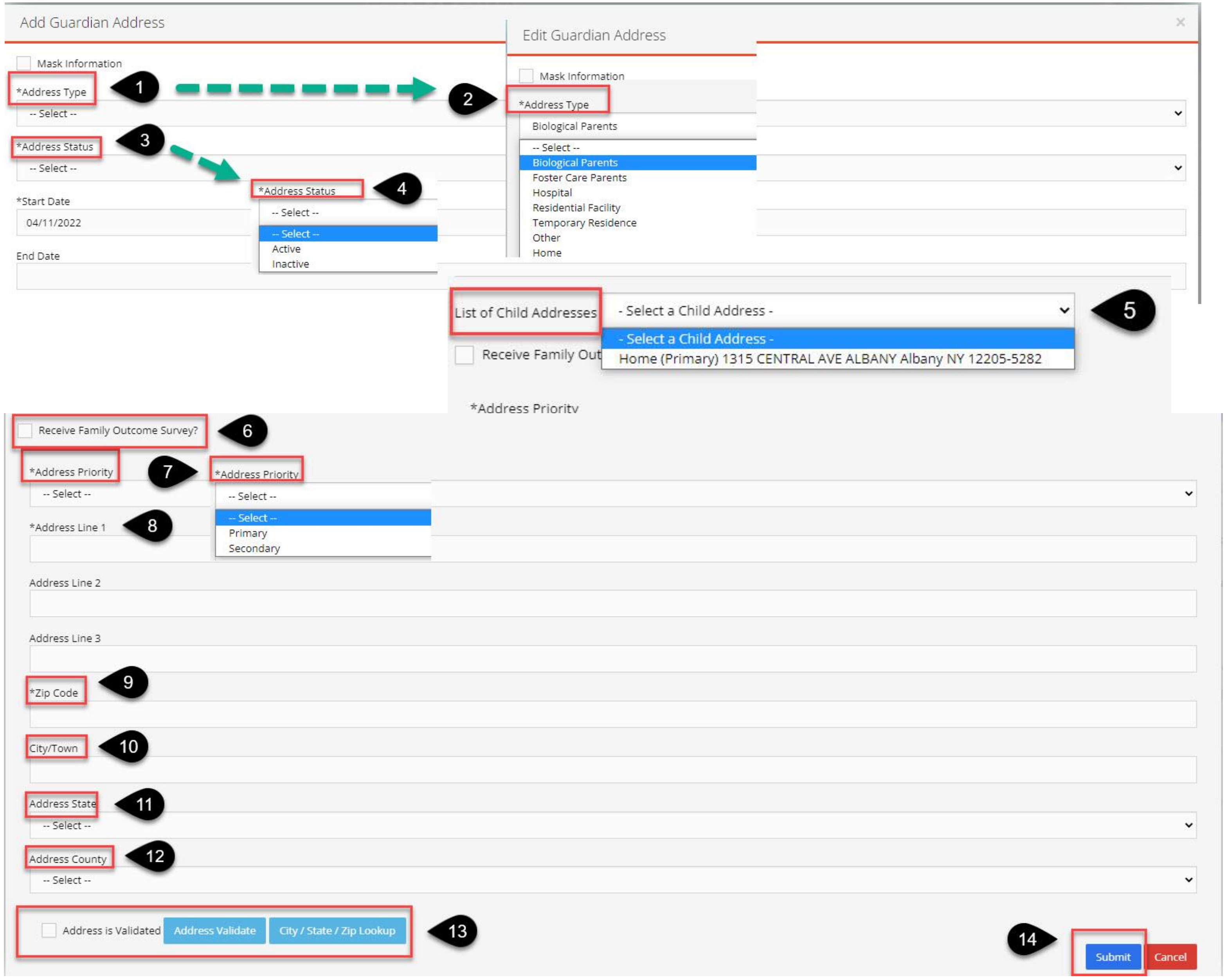
Numbers 9 – 12

Enter Zip, City, State or County OR use City/State/County Lookup – *See highlighted area 13*

13. Select **Address Validate**. A check mark auto populates after the address has been validated.
14. Select **Submit**.

Note

- The ability to add an address is role-dependent.
- System will indicate "Address Must be Validated" before saving
- It is not required the Guardian and Child have the same address. For example, a child may reside in a health care facility and the Guardian resides in the primary residence.
- For the **Family Outcome Survey,** the Service Coordinator selects who receives the Family Outcome Survey; typically, it is the primary contact but could also be an individual not designated as a primary contact.
- "Active Address Status" refers to the current address. The "Active" address does not have to be the same address as the Child's current address. "Inactive Address Status" indicates the address is no longer current.



Family Member

Guardian Secondary Languages

How To

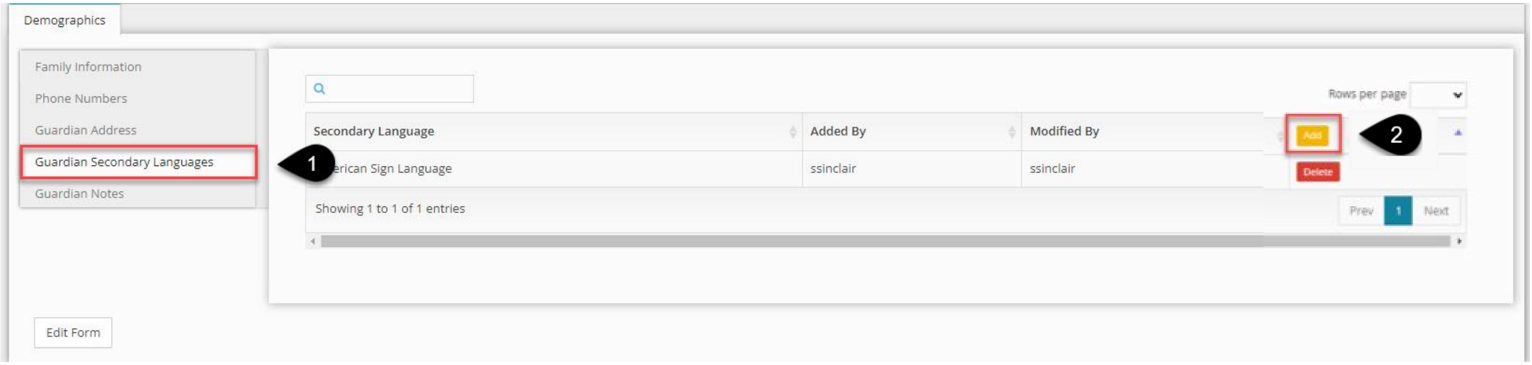
Add a Secondary Language

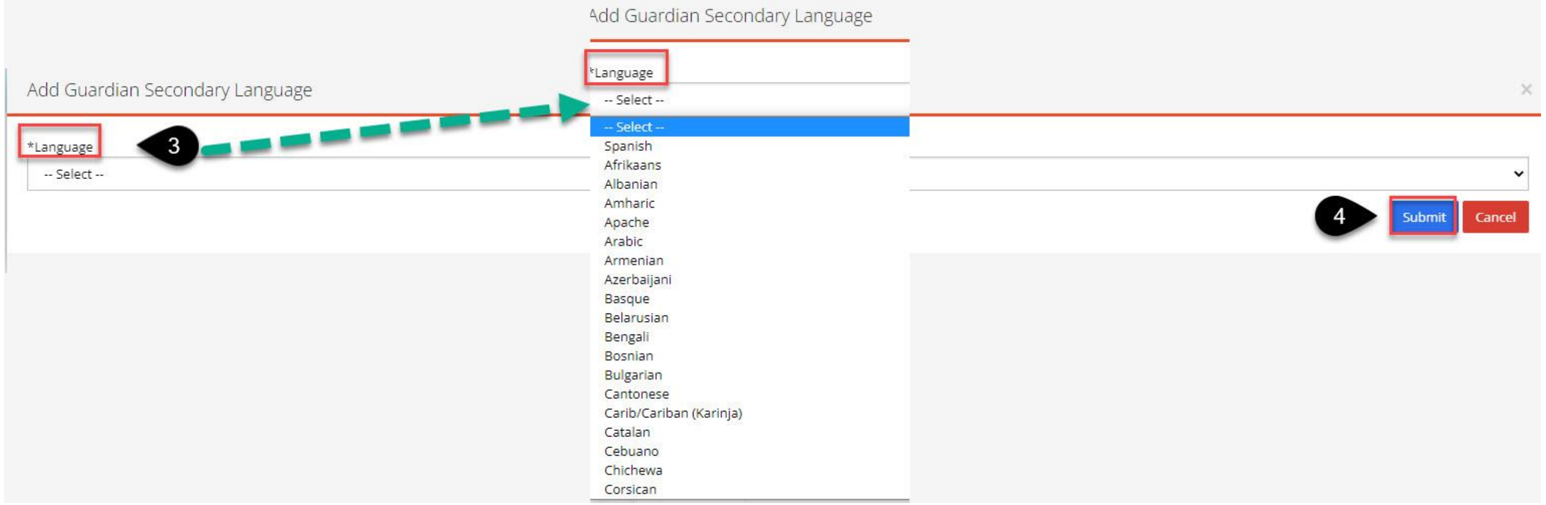
Step / Action

1. Select **Guardian Secondary Language**.
2. Select **Add**.
3. Select **Language** from drop-down menu.
4. Select **Submit**.

Note

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





Family Information

How To

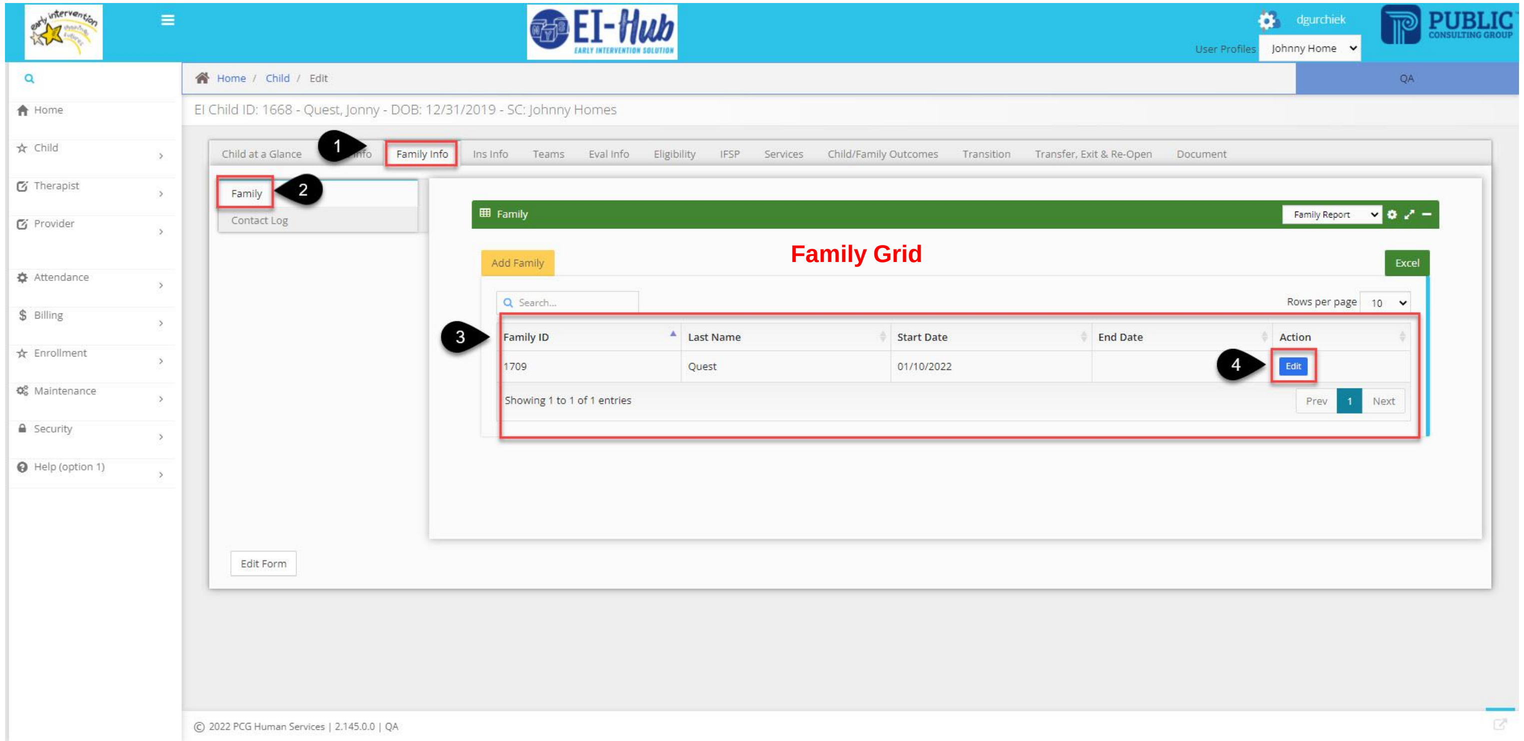
View and Edit Family Data

Step / Action

1. After completing a Child lookup, selecting a Child and opening the Child's record for editing, select the **Family Info** tab from the Child's open record.
2. **Family** panel automatically displays
3. The **Family** grid populates with existing Family (Family Base) Information including the Child's Last name, Family ID, and Start and End Dates.
4. Select **Edit** to add Family Members to the Family Base.

Note

- Adding a Child automatically creates a family within the **Family** Grid. The EI Child is the first member.
- 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 must be added as new family members.
- The family members no longer relevant to the child should be end dated rendering them inactive. In case of error and the wrong family member is end dated, the date can be changed. Family members **should not be deleted.**
- In the case of shared custody of a child, one parent must be designated as the primary, the other as secondary.



Family Member

Family Member Notes

How To

Add Family Member Notes

Step / Action

1. Select the **Family Member Notes** panel to add family member notes into the **Notes** textbox**.**
2. Select **Submit**.

Note

- Use the **Family Member Notes** panel to add notes for a particular family member (i.e., non-custodial father/mother or siblings). For example, if the family member is the Child's sibling – a note might indicate that "Johnny (the EI Child) gets along well with his sibling (Ben). Ben often helps Johnny with simple tasks such as putting away toys and teeth brushing".

Family Edit

Parent Consent Detail Report

How To

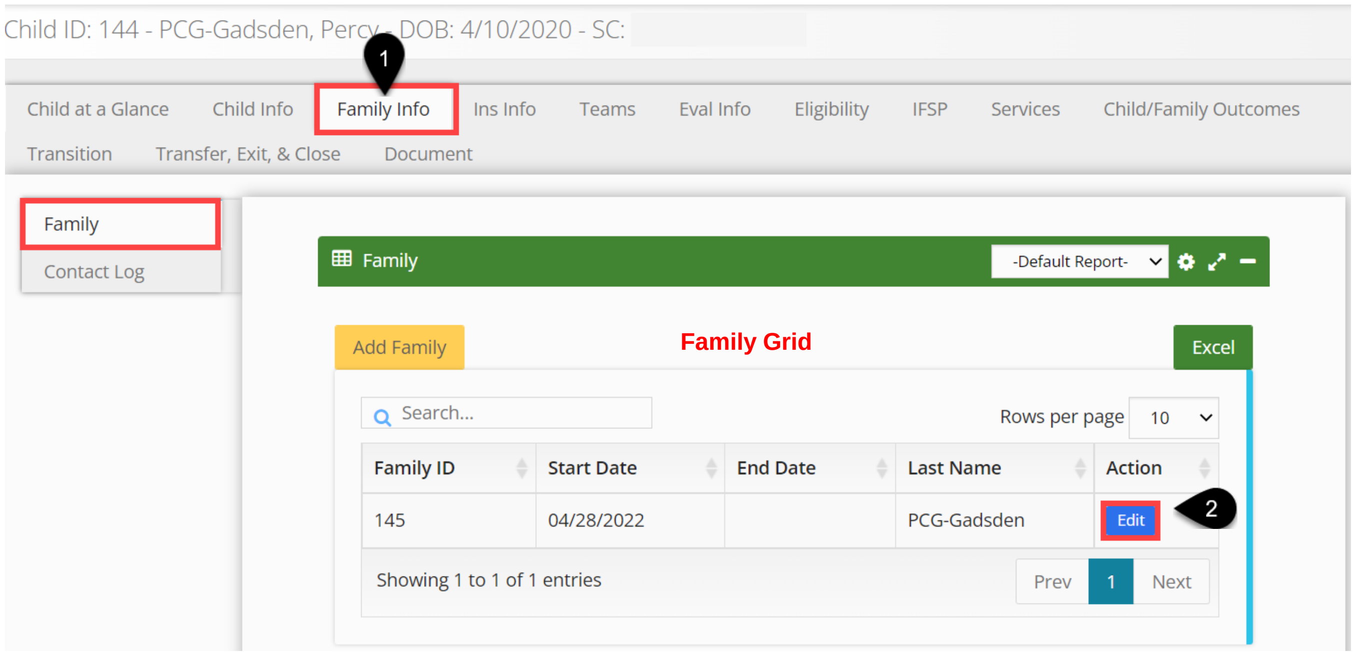
Add, View and Edit Parent Consent Detail Report

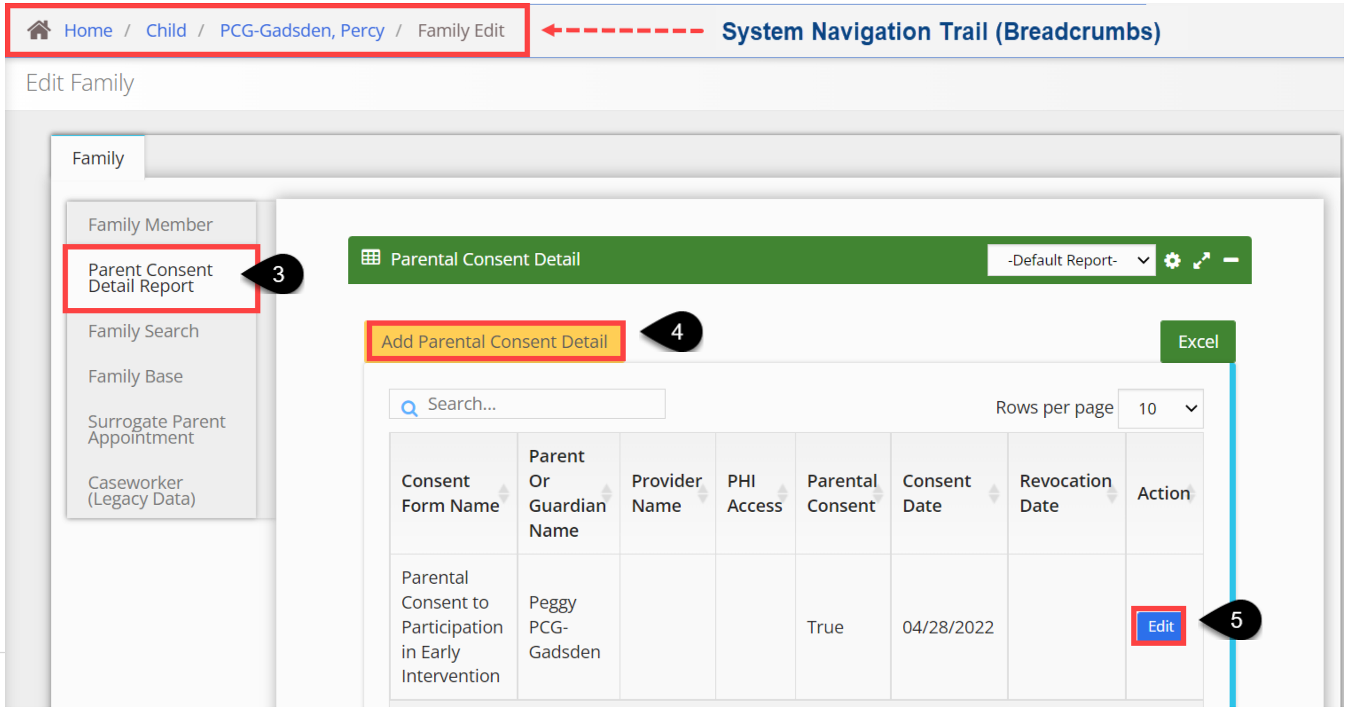
Step / Action

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 **Parental Consent Detail** grid.

Note

- Consent areas of EI-Hub are reflective of information that has been obtained on paper consent forms.
- Although the field is labeled "Parent/Guardian", all family members (i.e., siblings, case worker, etc) are listed in the dropdown menu; use caution and select the appropriate family member





Family Edit

Parent Consent Detail Panel

How To

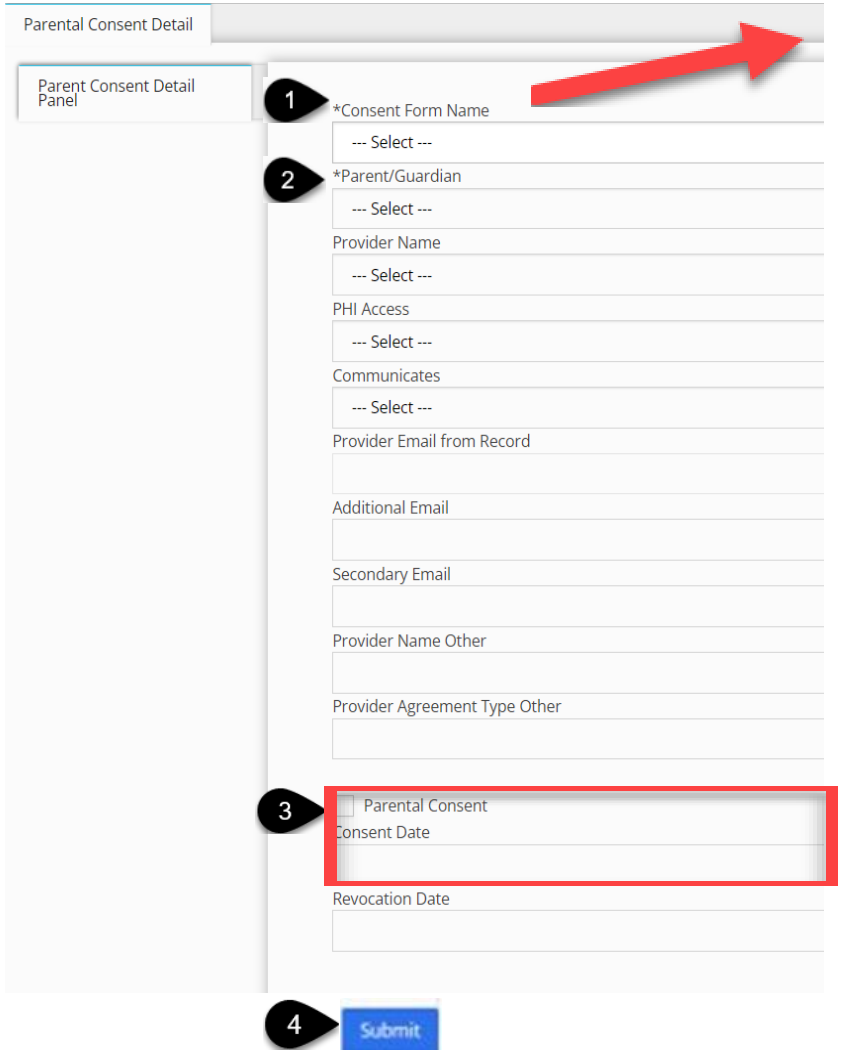
Complete Parental Consent Detail Panel

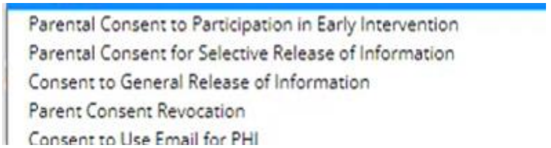
Step / Action

1. Select **Consent Form Name** from drop-down menu.
2. The **Parent/Guardian** drop-down auto-populates with the Parent/Guardian identified in the Family Member grid. Select the appropriate family member. **No restrictions are placed; anyone listed as a family member is selectable**.
3. Enter a check mark for **Parental Consent and enter parent consent date.**
4. Select **Submit.**

Note

- Provider Name is the individual/entity that the EI user/provider wishes to communicate with
- PHI access provides dropdown values that indicate the direction of the consent (Obtain, Release, Both or Decline)
- A check mark in the box with parent consent is an attestation that the parent/guardian have signed the paper consent.
- Fields marked with an asterisk (*) are mandatory.
- Fields without an asterisk (*) may be completed as needed or as appropriate.





- **Consent Form Name:** this field contains the consent options
- **Parent/Guardian:** this field should contain the name of the individual giving consent
- **Provider Name:** this field reflects the provider from which information is given or sought. *(Only applicable to providers that have been enrolled in the Hub*)*
- **PHI Access**: indicates the type of access being given to a provider
- **Communicates:** this dropdown presents the options to choose regarding email consents
- **Provider email from Record:** autopopulates with the email address of the provider selected above. (*Only if the provider is in the hub*)*
- **Additional email:** this field is to record an email not autopopulated **only for the name listed above***
- **Secondary email:** this field is to record a secondary email not autopopulated **only for the name listed above***
- **Provider Name Other:** this field is to record an outside provider (such as daycare or pediatrician) not enrolled through the Hub.
- **Provider Agreement Type Othe**r: this field is to record the provider agreement type other than Basic/Appendix agreement.

Family Edit

Family Search

How To

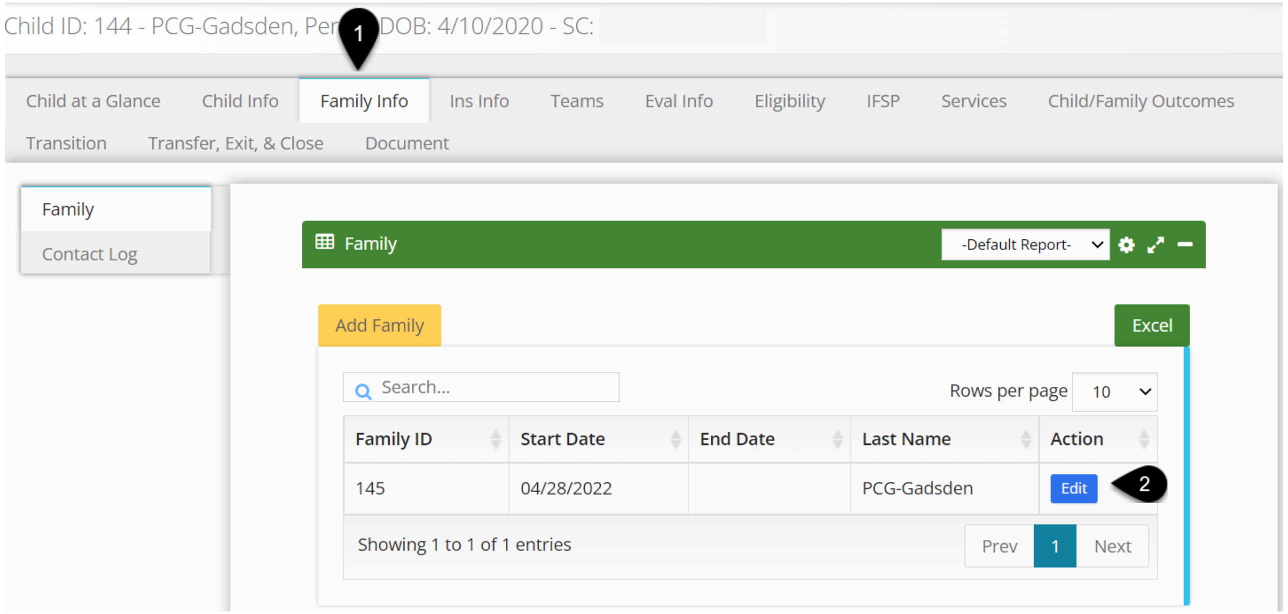
Link an Existing Child (Children) to a Family

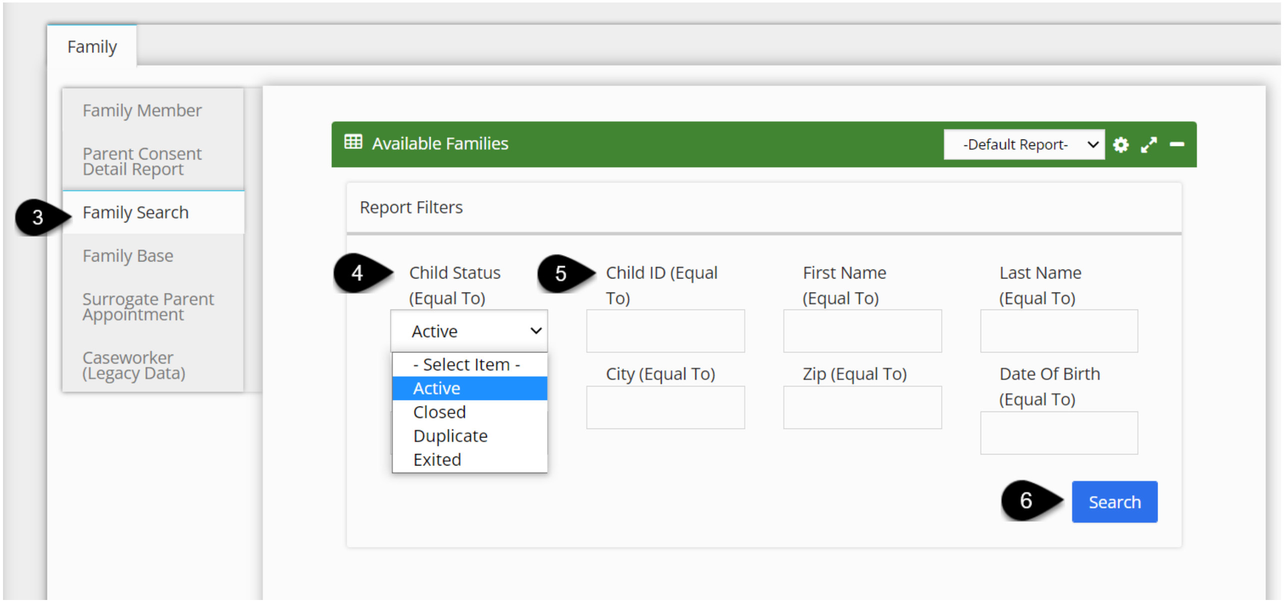
Step / Action

1. Select the **Family Info tab.** The Family panel populates along with the **Family** grid.
2. Locate the correct entry from the **Family** grid. Select the **Edit** button to edit the family record.
3. Select the **Family Search** panel.
4. Enter **Child Status** from drop-down menu.
5. Enter **Child ID** or **other search criteria** (i.e., last name).
6. Select **Search.**

Note

- The "Linking Children' feature is used to add an **existing** child (sibling) in the EI program as a family member to a **newly enrolled** Child's record.
- When searching, fields that have (Equal To) must contain the exact search criteria value (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:** A systemic step (a step performed by the system and not users) that automatically occurs within EI Hub when a child is past age eligibility and no further activities (i.e., claiming) can be entered for the child's case typically at 5 years 8 months of age. This is not a date or status that a user can enter.
  - **Duplicate**: The Child has a pre-existing record.
  - **Exited:** There are many circumstances under which a Child would exit the Early Intervention Program, some examples include "aging out", "transition" , "child relocating out-of-state", etc.





Family Edit

Family Member Search

How To

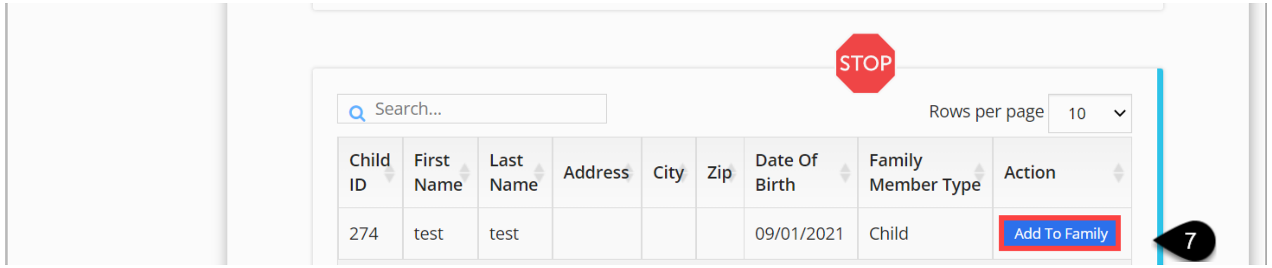
Link an Existing Child (Children) to a Family - Cont'd.

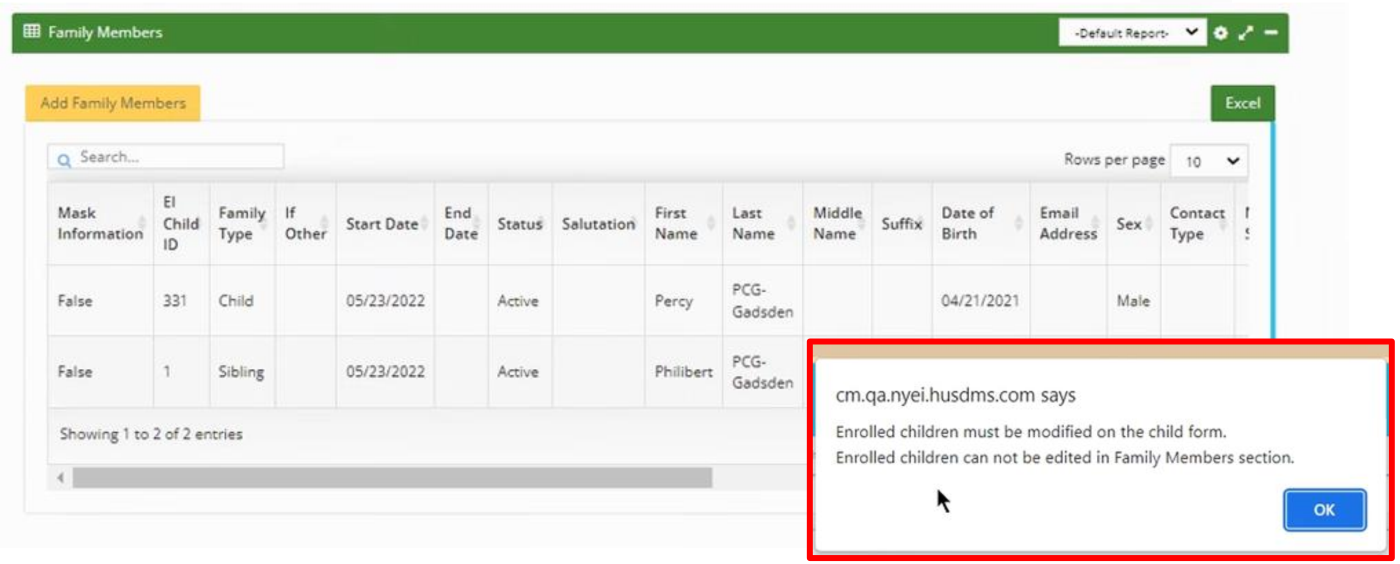
Step / Action

7. Select **Add to Family button** to link the Child to the family.

Note

- Once the child needing to be linked to a family populates, users should **STOP** and ask themselves if they are linking the correct child – once a child is linked to a family, the child can only be unlinked by certain roles.
- The linked sibling will now appear in the Family Member Grid.
- The system automatically protects information from an incorrectly linked child in case of error.
    - Only basic demographic information will be shown. When edit is selected an error message will appear as an indicator.





Family Edit

Family Base

How To

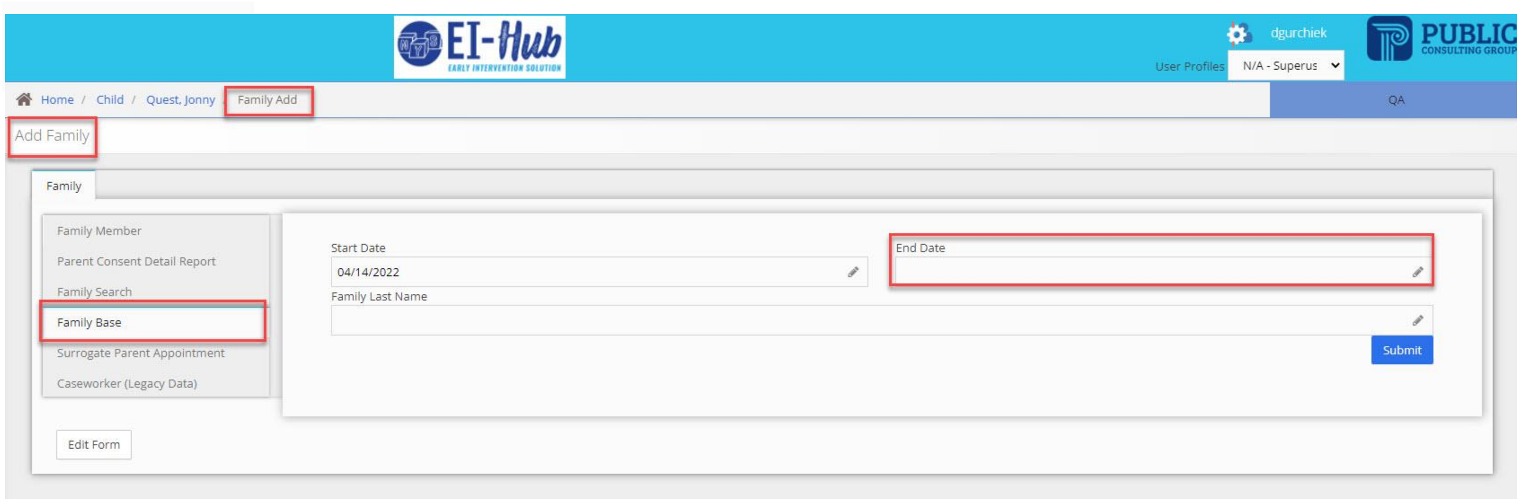
View a Family Status

Step / Action

- 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 if applicable.

Note

- In the event the name of the Family Base needs to change, users with certain access will be able to change the last name associated with the family base. Although this changes the last name associated with the family base, it DOES NOT change any of the last names of the individual family members within the family base.
- 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 **Family Member** panel to change the status of a child’s family members.



Family Edit

Surrogate Parent Appointment

How To

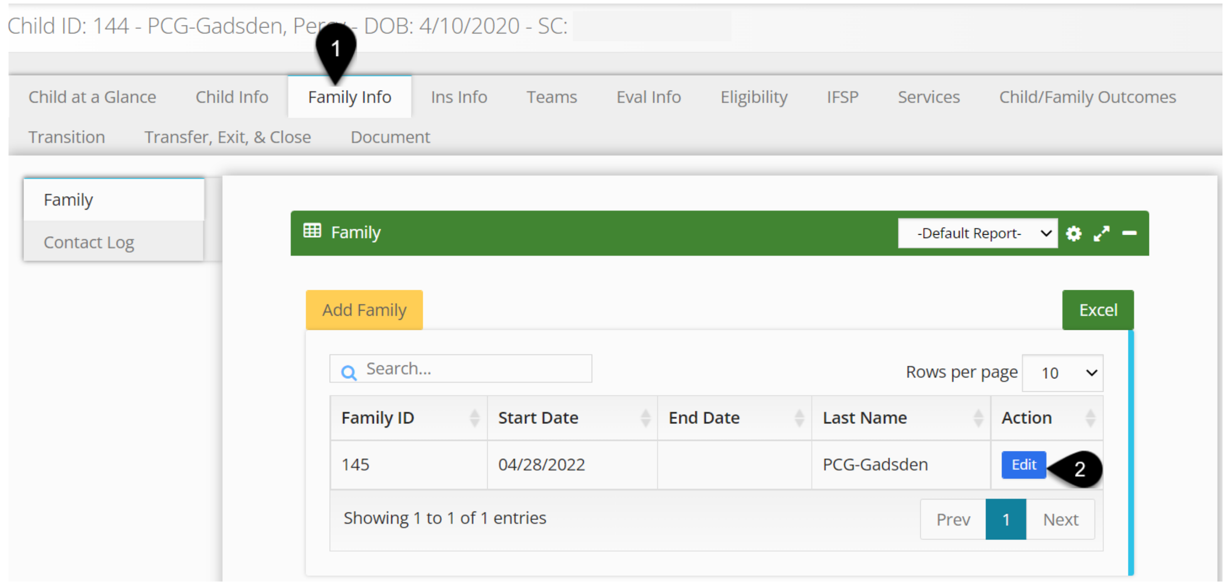
Entering and Viewing a Surrogate Parent Appointment

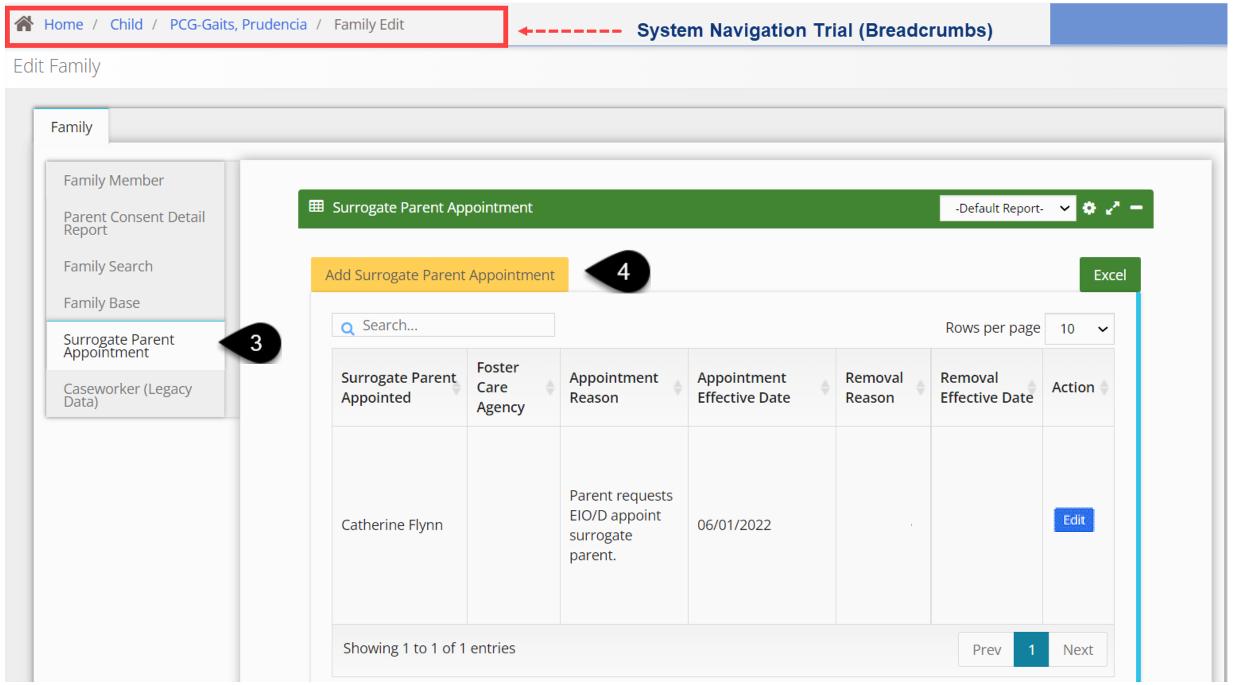
Step / Action

1. Select the **Family Info tab.** The Family panel populates along with the **Family Base** grid.
2. Locate the correct family from the **Family Base** 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.

Note

- **Before making a Surrogate Parent appointment, a Surrogate Parent must first be added to the family via the Family Member grid. The appointment of a Surrogate Parent is reserved to the EIO/D role.**
- The Surrogate Parent Appointment captured in EI-Hub is reflective of information obtained from the Surrogate Parent Designation paper form.
- For the purpose of Early Intervention decisions only, the surrogate is one who "stands in place" of the parent.
- In the process of appointing a surrogate parent, please ensure that confidential information (such as HIV information, CPS referrals) is kept in a separate file apart from the child's record





Family Edit

Surrogate Parent Appointment

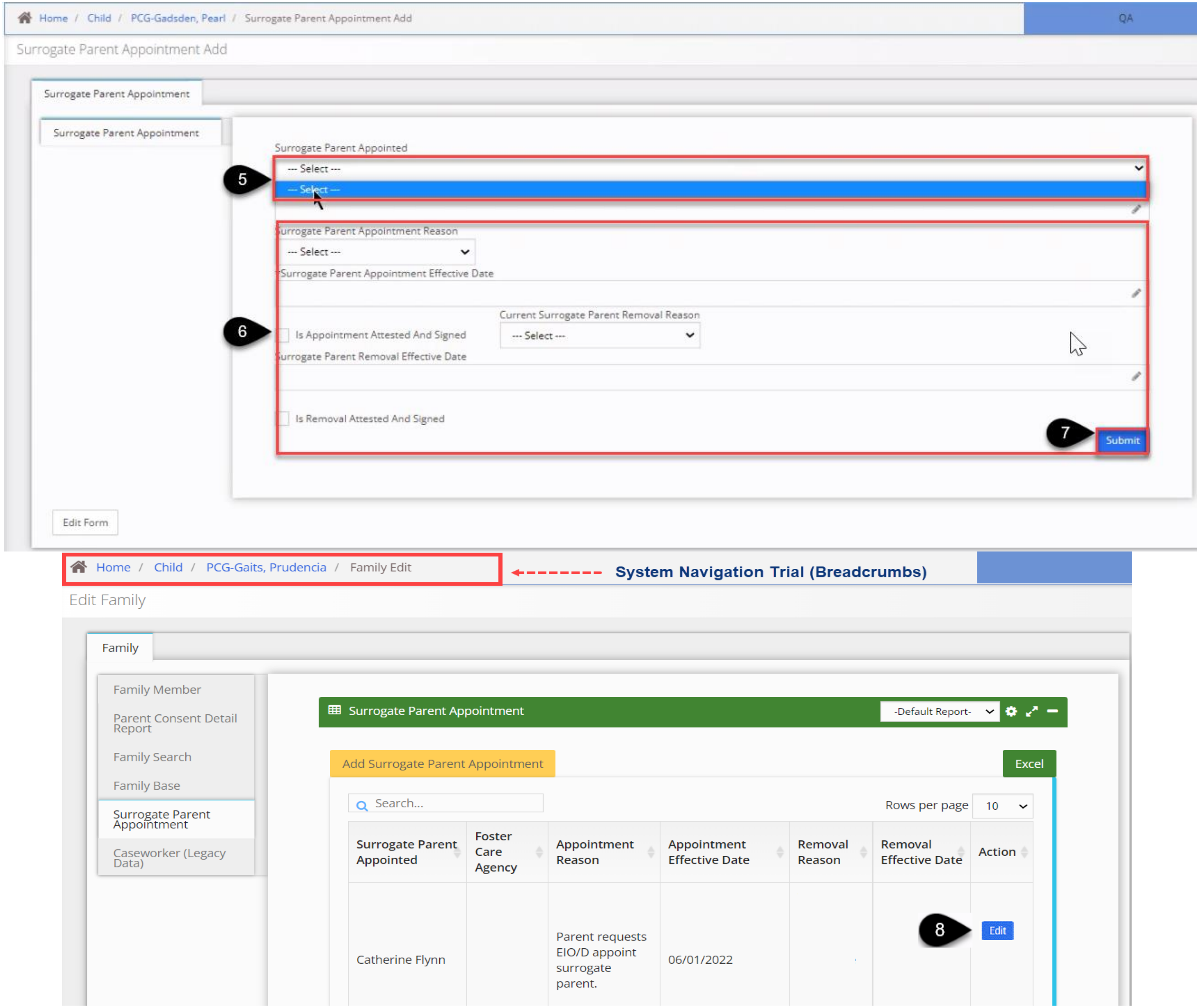
How To

Entering and Viewing a Surrogate Parent Appointment

Step / Action

5. To appoint (add) a surrogate parent for a child, click this drop- down and select the appropriate surrogate parent.

   If the Surrogate Parent Appointed drop-down list is blank, add Surrogates to a child's family *(Family tab > Family Member grid > Add Family Member > Demographics Tab and populate the associated panels).* This will then populate the Surrogate Parent Appointed drop-down
6. Complete all Surrogate Parent fields. Required information must be submitted before being able to upload Surrogate Parent Appointment form
7. Select **Submit**
8. Select the Edit button within the Surrogate Parent Appointment grid to view, edit or upload the completed Surrogate Parent Appointment form



Family Edit

Removing Surrogate Parent Appointment

How To

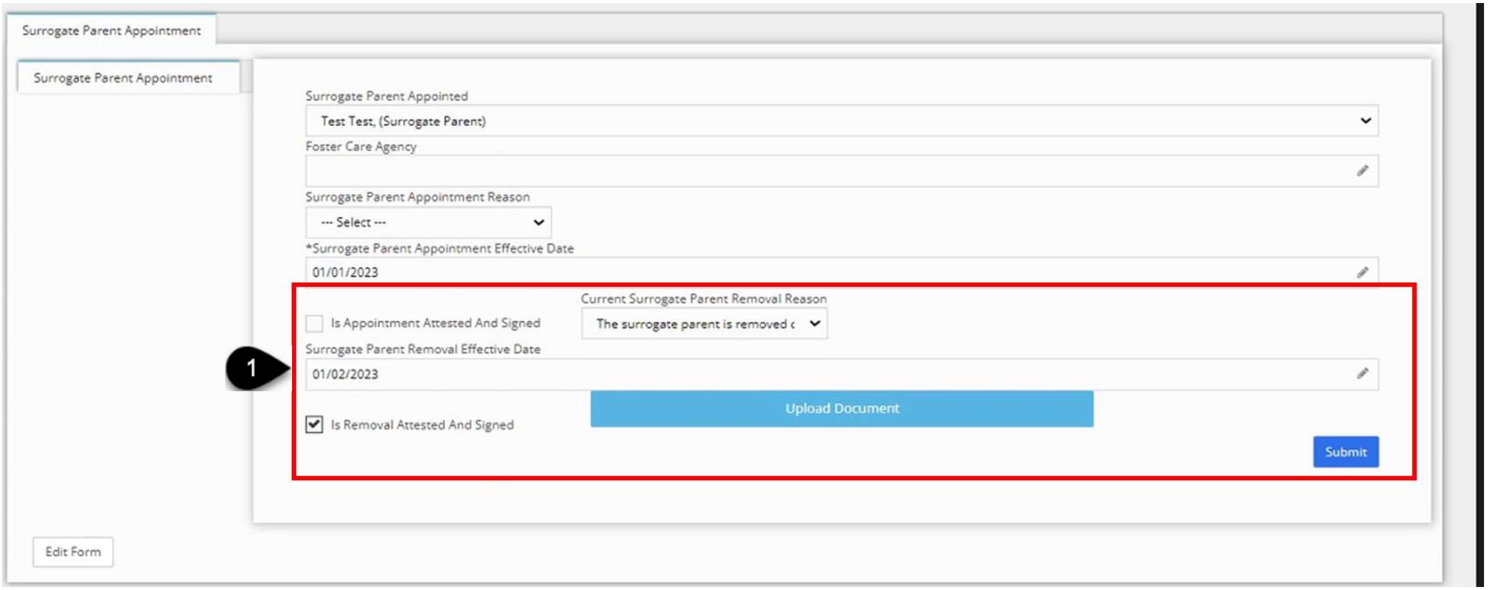
Removing a Surrogate Parent Appointment

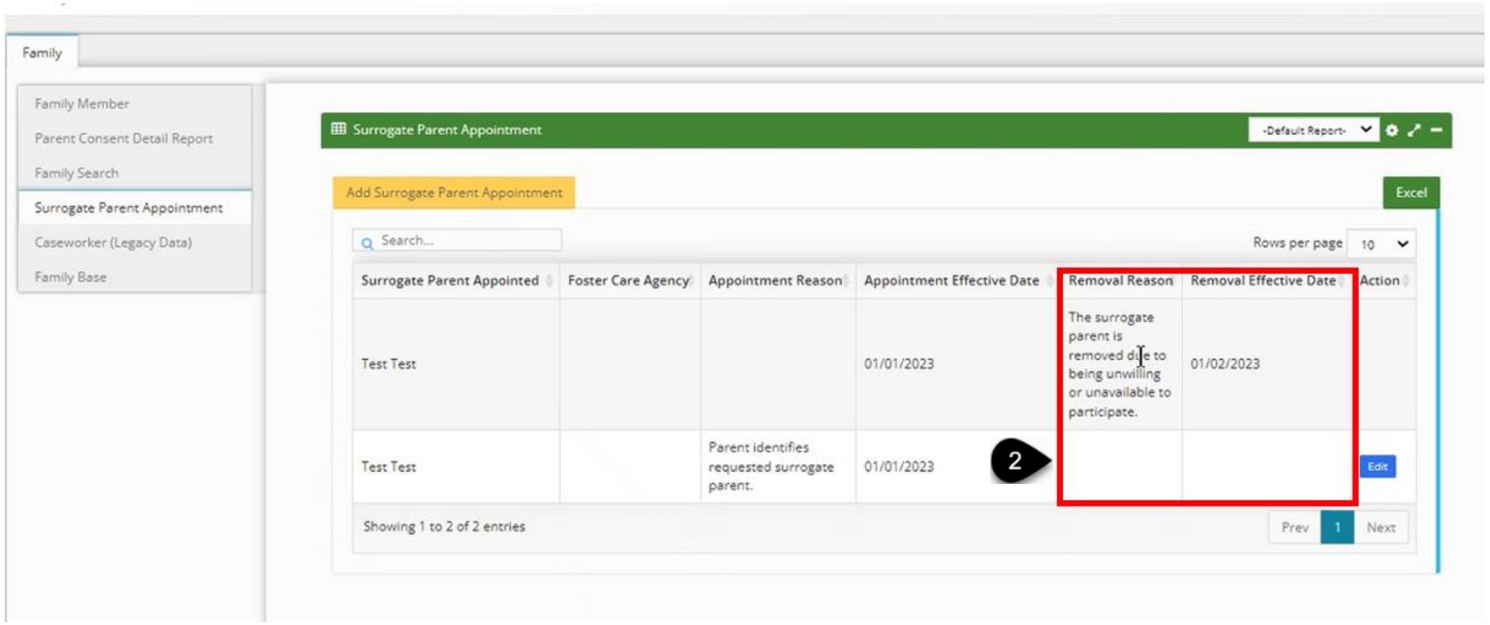
Step / Action

1. A Surrogate Parent can be removed by selecting the Surrogate Parent from the **Surrogate Parent Appointed** drop-down, identifying the Surrogate Parent removal reason via the **Current Surrogate Parent Removal Reason** drop-down, and clicking the **Removal Attestation** checkbox followed by submit. Documentation can be uploaded when signed.
2. In the Surrogate Parent Appointment Grid, the Removal Reason and Removal Effective Date will be indicated.

Note

- **Surrogate Parent Removal effective date is very important. End dating a family member is secondary to Surrogate Parent Appointment.**





Family Edit

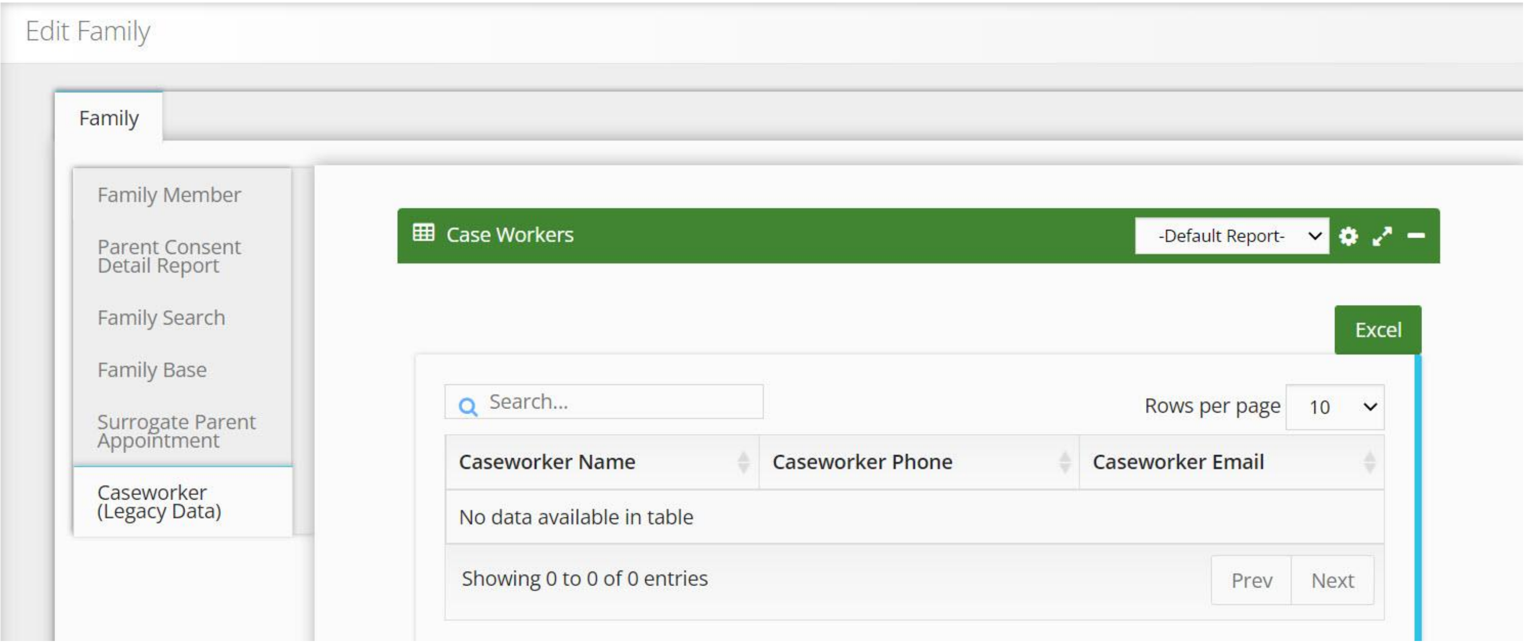
Caseworker (Legacy Data)

How To

View Caseworkers from Children Migrated from NYEIS

Step / Action

- The **Caseworker** panel is a repository of case worker information that has migrated over from NYEIS. This panel is for informational purposes only.
- **New children added to EI-Hub, will view/add caseworkers as family members.**



Family Info
Contact Log

How To

Enter, View, or Edit Contact Log

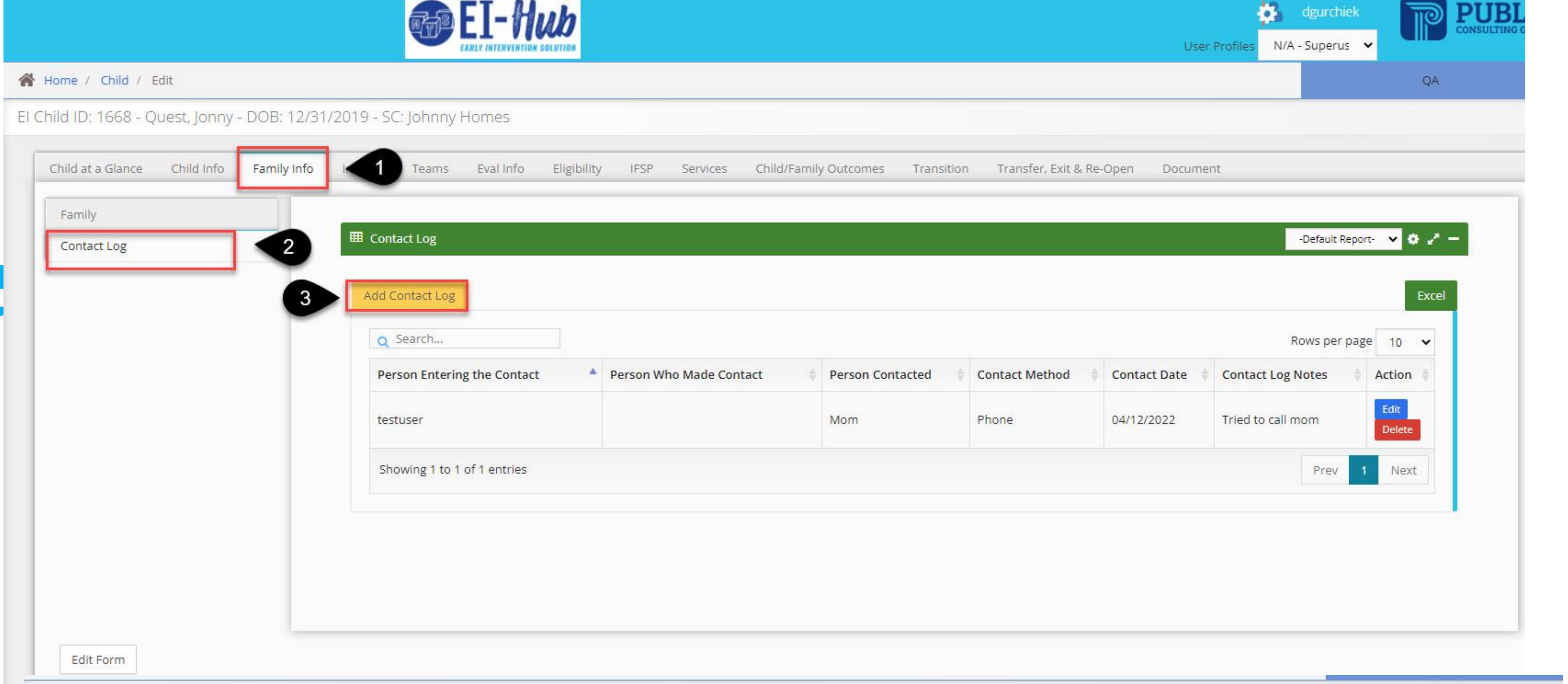
Step / Action

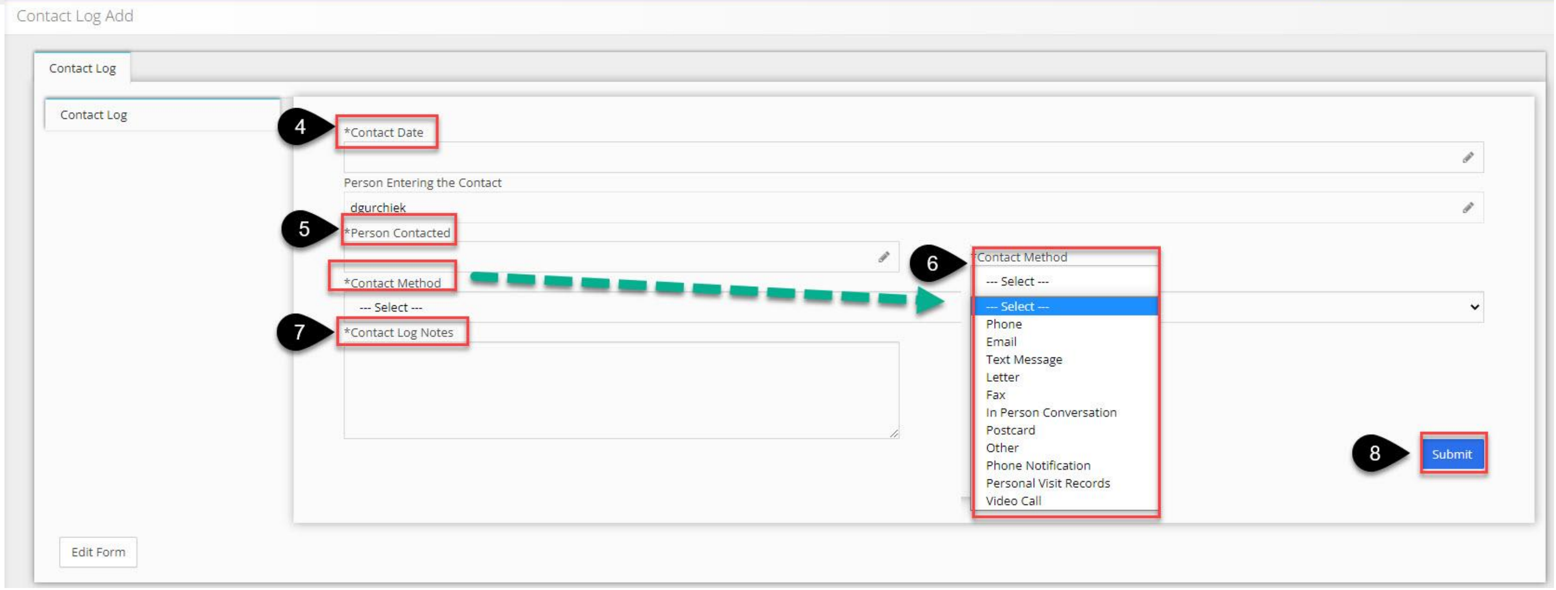
1. Select **Family Info**.
2. Select **Contact Log**.
3. Select **Add Contact Log**.

Steps 4 – 7

Enter information in fields.

8. Select **Submit**.





Note

- Information entered within the Contact Log does not serve as a substitute for session/progress notes. Please do not enter any restricted information into these contact logs i.e. Child Protective Reports, HIV status, etc.

Revision History

Version Number	Release Date	Author	Revision Summary
v.1	4.025.2022	Donna	First Draft Release
v.2	7.6.2022	Courtney	Second Draft
v.2	7.28.2022	Courtney	Third Draft
v.3	2/14/23	Matthew	Updated UAT Findings on surrogate parent