

ESIT-DMS Replacement: Training Guide for the Administration Tab Version 1.0



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Document History

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Chapter 9. Administration Tasks



Welcome to the Department of Early Learning’s (DEL’s) Early Support for Infants and Toddlers Data Management System (ESIT-DMS)—a case management tool for children entering, currently enrolled in, and exiting the federal IDEA Part C program.

This training guide contains exercises that you can use to navigate through the Administration tab. Because only a few users will have access to this tab, this document is an extension to the main training guide. (That’s why this one starts with Chapter 9.)

The goals of this chapter are for trainees to:

- Learn how to manage organizations, service areas, service types, users, and more.
- Learn how to search for specific users and organizations.

Exercise 9.1: Edit an Organization

As an administrator, you can edit information about the organization or agency to which you are assigned.

1. Log into your training environment.
2. Click the Administration tab.
3. Click the **Edit Organization** button on the Organization sub-tab. The following screen appears.

The screenshot shows the 'Edit Agency' form with the following data:

Agency Name	ESIT Program Headquarters		
Address	13 Some Street		
City	Lacey		
State	WA	Zip	98503
Phone	Office	(444) 555-4444	Ext.: <input type="text"/> Primary
E-mail	esit@program.com Primary		

Logo field: Browse for Logo (should be proportional to 140 width and 75 height)

4. Make a small change to the **Agency Name**.

5. Click the **Add Another Phone** link, and then add a new phone number. Make that number the primary number by clicking the **Primary** radio button.
6. Since an e-mail address likely already exists, click the **Add Another E-mail** link and enter an e-mail into it. Then make that the primary address by clicking the **Primary** radio button.
7. Click **Browse for Logo**. In the resulting window, find a logo file on your computer and click **Open**. The logo displayed in the box on the Edit Agency screen depicts how it will look when printed on documents like the IFSP.
8. Click **OK** when you are finished making changes. The system returns you to the Organization sub-tab with your changes displayed at the top of the screen.

Important: Make sure the logo fits completely within the outlined area. If it doesn't, use your image software (MS Paint, SnagIt, etc.) to change the size of the picture and re-save. The maximum size is 140 pixels wide and 75 pixels high.

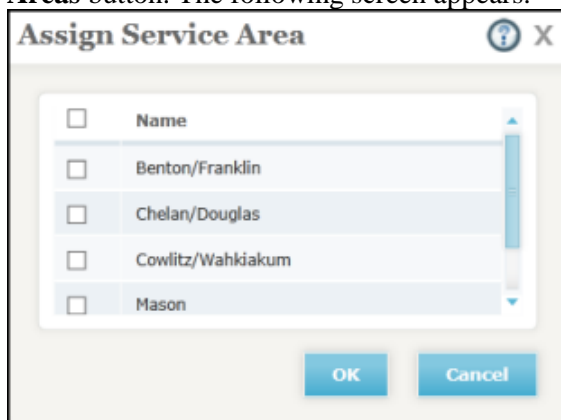
For example: If your logo is 200 pixels wide by 100 pixels high, resize the image to a width of 140 pixels in your image software. Let the software change the height accordingly so you maintain the aspect ratio and the picture doesn't get distorted. Copy and paste this resized image into a canvas set to 140 x 75 (e.g., in another instance of MS Paint). Then, slide the graphic to center it in that canvas and save the new file.

Click **Browse for Logo** again to re-import the newly sized logo.

Exercise 9.2: Assign Service Areas to an Organization

As an administrator, you can edit the service areas attached to your organization or agency. Service areas are the geographical places in which the providers in an organization (including FRCs) can provide their services. Any service areas not currently assigned to the organization display in the list.

1. On the Administration tab, stay on the Organization sub-tab and click the **Assign Service Areas** button. The following screen appears.

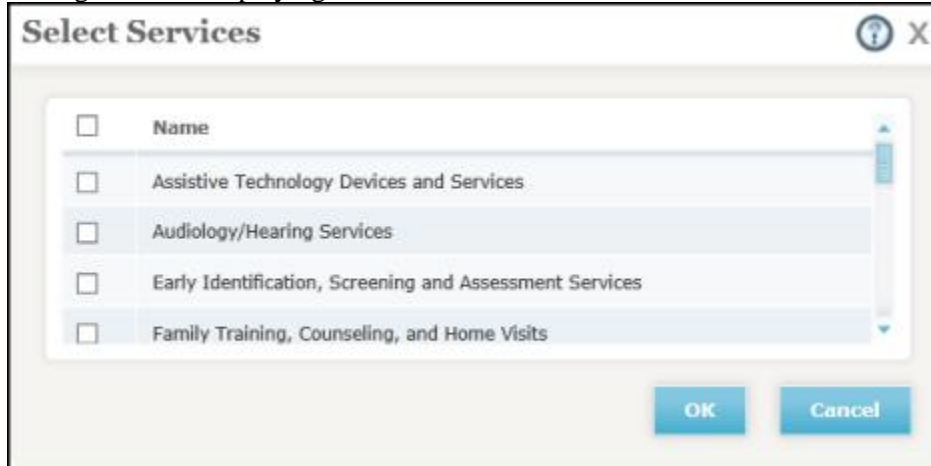


2. Select one or several service areas and click **OK**. The system returns you to the Organizations sub-tab with the area(s) you selected displaying in the main list. **Note:** If nothing displays in the list, it means all service areas are assigned to your organization. You can change this by deleting a few from the main list (click the red ball with the “x” in it) and then starting step 1 again.

Exercise 9.3: Assign Service Types to an Organization

You can also make sure organizations have the correct service types assigned to them. Service types describe what the agency provides to its clients.

1. On the Administration tab, stay on the Organization sub-tab and click the **Assign Service Types** button. The following screen appears with any services not currently assigned to the organization displaying in the list.



2. Select one or several service types and click **OK**. The system returns you to the Organizations sub-tab with the service(s) you selected displaying in the main list.

Exercise 9.4: Create ESIT-DMS Users (Includes Selecting Roles and Services)

You can add users to the system. This includes people who will use the system to do their jobs, as well as people who may not use the system but who need to be available as service providers to be added to a child's team.

1. On the Administration tab, stay on the Organization sub-tab and click the **Add Users** button. The following screen appears.

Create User

Organization Boyer LLA

Name and Address

First Name Last Name Set as Inactive

Address Get notifications via e-mail

City E-mail

State Zip Not a system user (no login created)

Phone Ext.: Primary

[Add Another Phone](#)

Roles [Select Roles](#) Qualified FRC

Services [Select Services](#) Passed background check <M/d/yyyy>

2. Enter a **First Name** and **Last Name** for the user. Do not click **Set as Inactive**.
3. Enter a street **Address**, **City**, **State**, and **Zip**.
4. Pretend the user has asked to receive system-generated notifications (about new ESIT messages, deadlines, etc.) in their e-mail address as well as on the Dashboard within the system. To allow this, check the **Get notifications via e-mail** box.
5. Then enter the user's **E-mail** address. This will become the user's logon ID, so it must be unique.
Note: Because the e-mail address in the system is used for logging in, you cannot add another one to get system-generated notifications. (See step 4 above). If you selected that option, those e-mails can only go to the address you enter here.
6. Do not click the **Not a system user (no login created)** box. This is used for people like service providers who will not be accessing the system to do work, but needs to be in the system to be made available as a resource that can be added to a child's team.

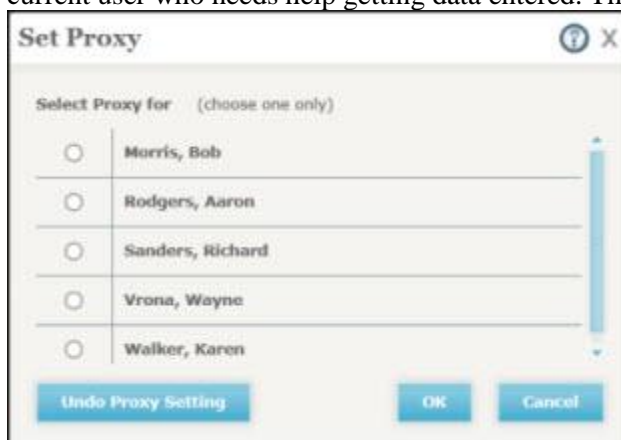
7. Select a **Phone** type from the dropdown and then enter a corresponding phone number in the next field. There is a separate box to enter the extension (Ext.) if necessary. (To add another phone number, click the **Add Another Phone** link. Then make sure to mark which is the **Primary** number.)
8. In the Role section, click **Select Roles**. The system displays a small window to qualify how the person will be allowed to use the system. Some examples are Data Entry, FRC, and Lead FRC. Choose one or many roles.
9. In the Services section, click **Select Services**. The system displays a small window to select from a list of the organization's approved services. The services you select here will be those the user can provide on a child's team.
10. If the agency the user is being added to is allowed to have FRCs, you'll see the **Qualified FRC** box. Check it if the person is an FRC.
11. If applicable, select a **Passed background check** date.
12. Click **OK** when you are finished. The system returns you to the Administration tab with the new user displayed in the list.

Important: If you don't see a service listed, it means you need to add it to the organization. An individual may only provide services from the subset of services the organization itself provides. (See *Exercise 9.3: Assign Service Types to an Organization* on page 4.)

Exercise 9.5: Set a Proxy

Some people, FRCs in particular, often need help to get all the necessary data entry done in time for federal reporting. The system allows qualified people to “proxy in” as others to help them get work done. You can set this

1. On the Administration tab, stay on the Organization sub-tab and click **Set Proxy** next to a current user who needs help getting data entered. The following screen appears.



The screenshot shows a "Set Proxy" dialog box. At the top, it says "Select Proxy for (choose one only)". Below this, there is a list of five names, each with a radio button to its left: "Morris, Bob", "Rodgers, Aaron", "Sanders, Richard", "Vrona, Wayne", and "Walker, Karen". At the bottom of the dialog, there are three buttons: "Undo Proxy Setting", "OK", and "Cancel".

2. Next, choose a person in the list who is allowed to proxy for the person selected on the Organization sub-tab.
3. Then click **OK**. The system returns you to the Administration tab.

Important: A user can only have one person who is allowed to proxy in and do work for that person. So an FRC named Jane Doe can only have one person proxy as her. Proxies, however, can do work for multiple people. They simply choose who to log in as when they click the Proxy As link in the upper right corner of the screen.

Exercise 9.6: Edit a User

You can edit users who are already in the system.

1. On the Administration tab, stay on the Organization sub-tab and click **Edit** next to an existing user. The following screen appears.

Edit User

Organization Boyer LLA

Name and Address

First Name: Anthony

Last Name: Borde

Address: 1234 State St

City: Olympia

State: WA Zip: 98503

Phone: Work (555) 121-2122 Ext.: 309 Primary

E-mail: anthony.borde@blah.com

Roles: Select Roles Lead FRC

Services: Select Services Family Training, Counseling, and Home Visits Health Services Social Work Services

Passed background check: 9/5/2011

Set as Inactive

Get notifications via e-mail

Qualified FRC

OK Cancel

2. Perhaps the user got married and has a new last name, or perhaps the user moved to a new area. Edit the name or address (or both).
3. Click **Select Services** to add a service to the person. **Note:** This will only work if the user isn't already assigned all the services for that particular organization.
4. Click **OK** when you are finished. The system returns you to the Administration tab with the modified user still displayed in the list.

Exercise 9.7: Create a New Service Area

Administrators with full access can create new service areas.

1. On the Administration tab, expand the Administration Links mini-menu in the lower left corner. Then click **Create Service Area**. The following screen appears.



2. Enter the **Area Name**.
3. Select the correct **Lead Agency** from the dropdown.
4. Enter the **Service Area Number**.
5. Click **OK** when you are finished. The system returns you to the Service Area sub-tab of the Administration tab. The service area you entered will be available in the Service Area dropdown at the top of the screen.

Note: You can edit a service area by clicking the **Edit Service Area** button on the Service Area sub-tab of the Administration tab.

Exercise 9.8: Assign Service Provider Organizations to a Service Area

Once you have a new service area, you can assign service provider organizations to it. These are all the organizations that provide services to children in the new service area. They can be existing service providers or brand new ones.

1. On the Administration tab, open the Service Area sub-tab.
2. Make sure the service area you created is selected at the top of the screen and then click **Assign Service Provider Organization**. The following screen appears.

Assign Service Provider Organization

You are assigning the selected service providers to the Adams Service area.

Search

Service Provider Organizations

- ABC Child Psychological Assessments
- Alexander Audiology
- iKidz Vision Services
- Test Service Provider
- Tom's League of Nations

3. Type in at least part of the name of an organization (perhaps one you currently work with) and click **Search**.
 - If the organization you searched for displays in the list, select it and then click **Assign**. The system returns you to the Service Area sub-tab with the name you selected displaying in the list of Service Provider Organizations.
 - If the organization you searched for doesn't display, try searching with no search criteria.
4. If you can't find the organization you need, with appropriate permissions you can create a new one by clicking the Create New Service Provider Organization button. (The next exercise takes you through this.)

Important: You can only add one service provider organization to a service area at a time.

Exercise 9.9: Create a New Service Provider Organization

If you didn't find a service provider you need to add to a service area, you can add that service provider to the system.

1. On the Assign Service Provider Organization screen (see above), click **Create New Service Provider Organization**. The following screen appears.

The screenshot shows a web form titled "Create New Service Provider Organization". At the top, it displays "Service Area Adams". The form contains several input fields: "Provider Name", "Address", "City", "State" (with a dropdown arrow), "Zip", "Phone" (with a dropdown arrow), "Ext.:" (with a separate input field), and "E-mail" (with a "Primary" radio button). There are also links for "Add Another Phone" and "Add Another Email". A "Browse for Logo" button is present, with a note below it stating "(should be proportional to 140 width and 75 height)". At the bottom right, there are "OK" and "Cancel" buttons.

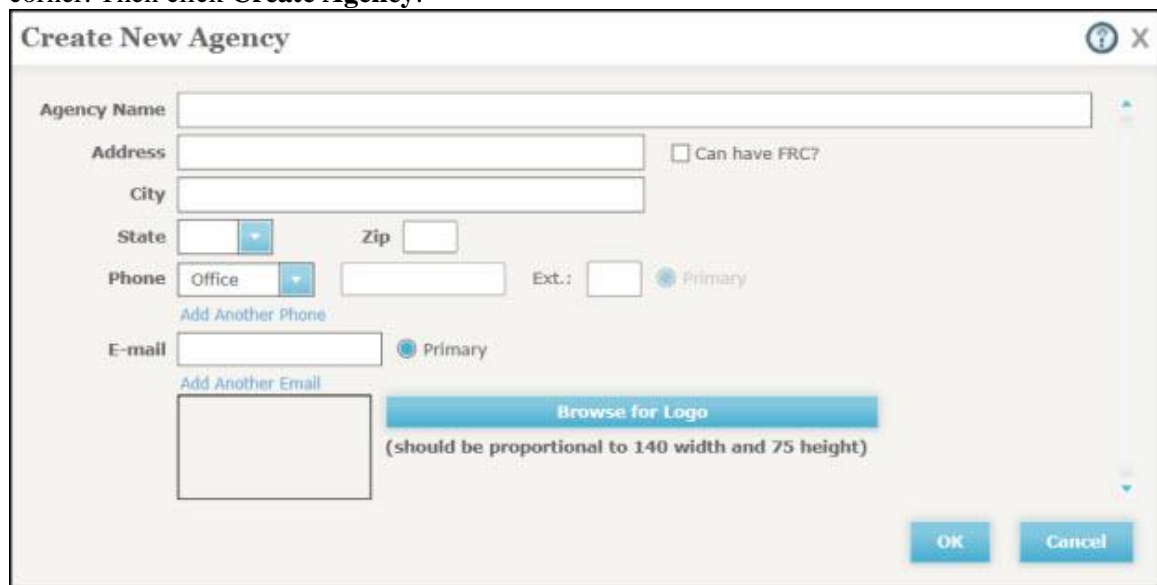
2. The service area you selected at the top of the Service Area sub-tab is displayed at the top of the screen. If this is not the correct service area for the new organization, cancel out of this screen and choose the right service area. (Then click **Assign Service Provider Organization** on the Service Area sub-tab.)
3. Once the service area at the top of the screen is correct, enter the **Provider Name**.
4. Then enter the provider's street **Address**, **City**, **State**, and **Zip**.
5. Select a **Phone** type from the dropdown and then enter the corresponding phone number in the next field. There is a separate box to enter the extension (**Ext.**) if necessary. (To add another phone number, click the **Add Another Phone** link. Then make sure to mark which is the **Primary** number.)
6. Enter or edit the main **E-mail** address, if one exists. (To add another, click the **Add Another E-mail** link.)
7. If the organization will be issuing IFSPs and would like its logo on that documentation, click **Browse for Logo**. In the resulting window, find the logo file on your computer and

- click Open. The logo displayed in the box on the Create New Service Provider Organization screen depicts how it will look when printed on documents. (See *Exercise 9.1: Edit an Organization* on page 2 if you need a refresher on dealing with logo sizes.)
8. Click **OK** when you are finished. The system returns you to where you were on the Administration tab. The new service provider displays on the screen.

Exercise 9.10: Create a New Agency

You can also create brand new agencies.

1. On the Administration tab, expand the Administration Links mini-menu in the lower left corner. Then click **Create Agency**.



2. Enter the **Agency Name**.
3. Enter the agency's street **Address, City, State, and Zip**.
4. If the agency will have at least one FRC, check the **Can have FRC** box. This enables the system to know which agencies are allowed to have FRC users. A new service provider organization that does not have this box checked will not be allowed to have FRCs assigned to it.
5. Select a **Phone** type from the dropdown and then enter the corresponding phone number in the next field. There is a separate box to enter the extension (Ext.) if necessary. (To add another phone number, click the **Add Another Phone** link. Then make sure to mark which is the **Primary** number.)
6. Enter the main **E-mail** address, if one exists. (To add another, click the **Add Another E-mail** link.)

7. If the agency would like its logo on documentation printed from the system, click **Browse for Logo**. In the resulting window, find the logo file on your computer and click **Open**. The logo displayed in the box on the Create New Agency screen depicts how it will look when printed on documents. (See *Exercise 9.1: Edit an Organization* on page 2 if you need a refresher on dealing with logo sizes.)
8. Click **OK** when you are finished. The system returns you to where you started from.

Exercise 9.11: Create a New School District

Occasionally, you may need to add a new school district to the system.

1. On the Administration tab, expand the Administration Links mini-menu in the lower left corner. Then click **Create School District**. The following screen displays.

The screenshot shows a web form titled "Create New School District". The form contains the following fields and options:

- District Name**: A text input field.
- Address**: A text input field.
- City**: A text input field.
- State**: A dropdown menu.
- Zip**: A text input field.
- Phone**: A dropdown menu with "Office" selected.
- Ext.:**: A text input field.
- E-mail**: A text input field.
- Can have FRC?**: A checkbox.
- Primary**: Radio buttons for "Primary" (selected) and "Secondary".
- Buttons**: "Add Another Phone" and "Add Another Email" (links), "Browse for Logo" (button), "OK" (button), and "Cancel" (button).
- Logo Placeholder**: A box with the text "(should be proportional to 140 width and 75 height)".

2. Enter the **District Name**.
3. Then enter the district office's street **Address**, **City**, **State**, and **Zip**.
4. If the school district will have at least one FRC, check the **Can have FRC** box. This enables the system to know which agencies are allowed to have FRC users. A new service provider organization that does not have this box checked will not be allowed to have FRCs assigned to it.
5. Select a **Phone** type from the dropdown and then enter the corresponding phone number in the next field. There is a separate box to enter the extension (Ext.) if necessary.
6. Enter the main **E-mail** address, if one exists.

7. If the district would like its logo on documentation printed from the system, click **Browse for Logo**. In the resulting window, find the logo file on your computer and click Open. The logo displayed in the box on the Create New School District screen depicts how it will look when printed on documents. (See *Exercise 9.1: Edit an Organization* on page 2 if you need a refresher on dealing with logo sizes.)
8. Click **OK** when you are finished. The system opens an Organization window where you can make edits to the school district and assign it to service areas.

Exercise 9.12: Search for Users

On the Search Users sub-tab of the Administration tab, authorized personnel can find a specific system user by searching service area, organization, type, name, or a combination of those.

1. Click the Search Users sub-tab of the Administration tab. A screen similar to the following appears.

Name	Organization	Roles	Services	Status		
Adamson, Melba	Innovative Services NW Fed			Active	Get Proxy	0.00
Ashbaugh, Malinda	The Opportunity Council			Active	Get Proxy	0.00
Baber, Kristi	Kindergarten Center			Active	Get Proxy	0.00
Baber, Megan	SKIP			Active	Get Proxy	0.00
Baber, Megan	Northwest Center Child Dev			Active	Get Proxy	0.00
Baber, Megan	Birth To Three Development			Active	Get Proxy	0.00

2. To find a user, select/enter any combination of the following:
 - Service Area
 - Organization
 - User Type (FRC, Liaison, etc.)
 - User First Name or Last Name
3. Then click **Search**. People with close matches to your entered criteria display in the list. If you want to see the complete list of ESIT-DMS users, do not enter any fields before you click **Search**. Once you find who you are looking for, you can set a proxy for that person (see *Exercise 9.5: Set a Proxy* on page 6), edit that person (see *Exercise 9.6: Edit a User* on page 7), or delete them by clicking the red X in that row.

Exercise 9.13: Transfer Cases from One FRC to Another

On the Search Users sub-tab of the Administration tab, authorized personnel can transfer cases between FRCs in an agency.

1. Click the Search Users sub-tab of the Administration tab, and then find an FRC. Make sure you choose one from an agency that has more than one FRC, and who all have at least some children in their caseload.
2. Click **Transfer** next to the FRC you want to transfer from. The following screen displays.

The screenshot shows a 'Transfer Children' dialog box. The 'Transfer from' section is set to 'Thurner, Jed' and lists four children: Deanna Daisy, Dorcas Daisy, and Dorreen Daisy, each with an unchecked checkbox. The 'Child's Name' heading also has an unchecked checkbox. The 'Transfer to' section is set to 'Jardinier, Amber' with a selected radio button. The 'Reason for Transfer' section has a text area and a rich text editor toolbar. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

3. In the Transfer from section of the screen, select the case or cases to take from the current FRC. To select all the cases, check the box next to the Child's Name heading.
4. In the Transfer to section, choose the FRC who will have the case(s) transferred to her caseload.
5. In the Reason for Transfer section, enter a reason for moving the children to the new FRC.
6. Click **OK** when you are finished. The system returns you to the Administration tab. When the Transfer from FRC logs in, the selected children will not display on that user's Children tab (the caseload). When the Transfer to FRC logs in, the new children will display on that user's Children tab.

Note: If you need to transfer cases to multiple FRCs in the same agency, you will have to do them one FRC at a time. Transfer the needed cases to the first FRC and click **OK**. Then click **Edit** next to the Transfer from FRC again and move the cases to the next FRC. Do this as many times as necessary.

Exercise 9.14: Search for Organizations

Authorized personnel can find a specific system organization by searching service area, type, organization name, status, or a combination of those.

1. Click the Search Organizations sub-tab of the Administration tab. A screen similar to the following appears.

Name	Service Area	Type	Status
Adams County Health Department	Adams	Agency	Active
Apple Physical Therapy	Adams	Service Provider	Active
ESIT Program Headquarters	Adams	State Program Agency	Active
Divans	Adams	Agency	Active

2. To find an organization, select/enter any combination of the following:
 - Service Area
 - Organization Type (Agency, School District, etc.)
 - Organization Name
 - Organization Status
3. If you are searching for a Local Lead Agency (LLA), check that box.
4. Then click **Search**. Organizations with close matches to your entered criteria display in the list below. If you want to see the complete list of ESIT-DMS organizations, do not enter any fields before you click **Search**. Once you find what you are looking for, you can:
 - Edit that organization (see *Exercise 9.1: Edit an Organization* on page 2)

- Assign service areas to that organization (see *Exercise 9.2: Assign Service Areas to an Organization* on page 3)
- Assign service types to that organization (see *Exercise 9.3: Assign Service Types to an Organization* on page 4)
- Add users to that organization (see *Exercise 9.4: Create ESIT-DMS Users (Includes Selecting Roles and Services)* on page 5)