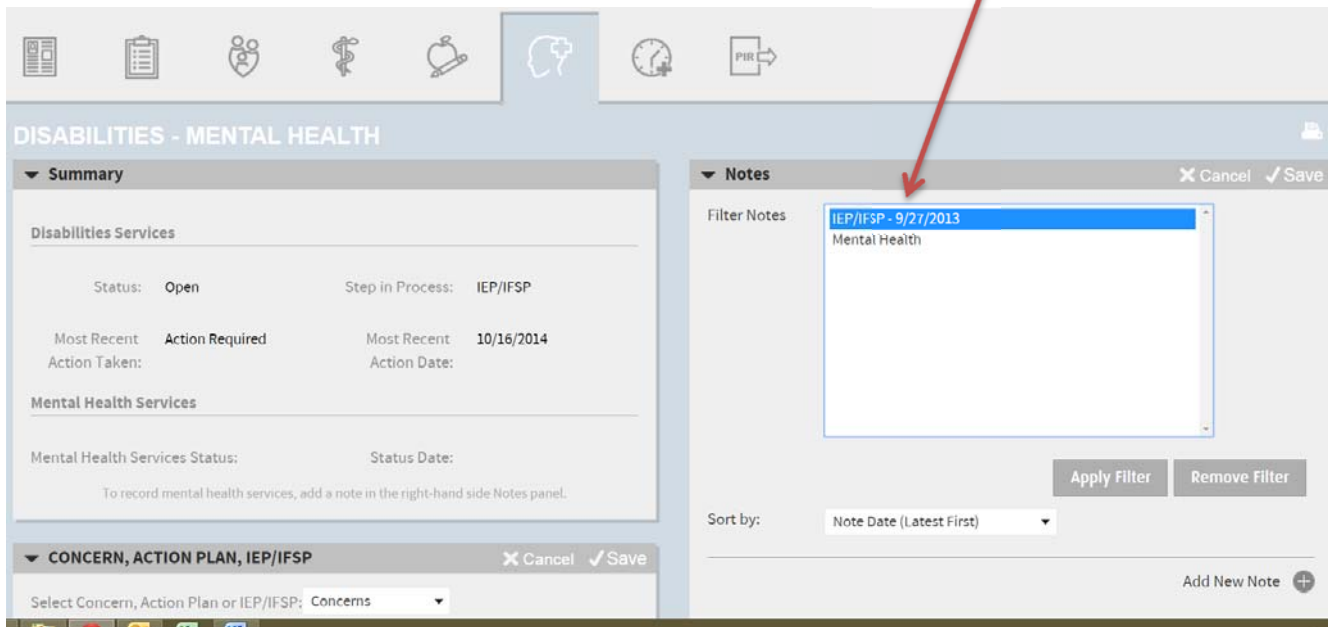


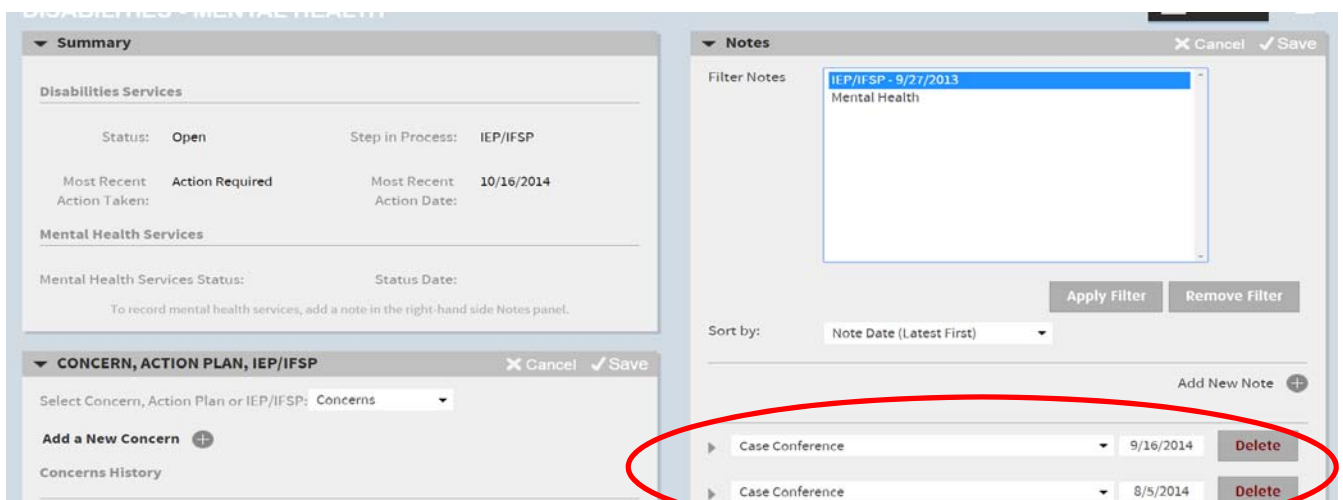
# Documenting IFSP Team Meetings Using Shine

December 16, 2014

Start by going to the Mental Health/Disability Tab. Entries will be made in the Notes area on the right side of the screen. Start by selecting the IFSP to only bring up items related to the IFSP.



Next you will look for any 'Case Conference' notes that have been created for the team meeting you want to enter information about.



Open the case conference by clicking on the little arrow to the left of it. You will then be able to find out if it is the team meeting you want to enter data for. If it is enter the information at the beginning of the note you usually would (who attended, what happened, etc.). Then click the update button to save your additions. That's it when the case conference note has already been created.

Sort by: Note Date (Latest First) ▼

Add New Note +

▼ Case Conference ▼ 9/16/2014 Delete Update

Created on 9/12/2014 by Cricket Tepper

IFSP Team Meeting Tues., 9/16/14 @ 1:00 PM  
Jefferson Child Development 311 Holmes Ave., Medford

**PIR Services**

Select Option ▼

Select Option ▼

Select Option ▼

**Associated with**

IEP/IFSP - 9/27/2013

Mental Health Notes

Now, if you check the notes and there is not a case conference note for the IFSP team meeting you have attended then you will need to create one. Do this by clicking the (+) sign to the right of 'Add New Note'. This will create a new note in the system. You will select case conference as the type of note to be created and the current date. Then you will enter the note information on the time and date of the meeting, the location, and who attended. **Finally, be sure to check the box for IFSP/IEP under 'Associated with'.** This is so the note is only associated with the IFSP and not with any action plans or mental health notes that may be present. Save the note and you're done.

The screenshot shows a web application interface for creating a note. A dropdown menu is open, listing various note types. The 'Case Conference' option is highlighted with a blue bar and a red circle. Below the dropdown, a 'Date' field is highlighted with a red circle. Below the dropdown, a 'NOTE DETAILS' section is visible. At the bottom, there are sections for 'PIR Services' and 'Associated with'. The 'Associated with' section has three checkboxes: 'Action Plan -', 'IEP/IFSP - 5/5/2014', and 'Mental Health Notes'. The 'IEP/IFSP - 5/5/2014' checkbox is highlighted with a red circle.

Select Option  
Mental Health Staff/Internal Consultation  
Mental Health Parent Consultation  
Mental Health Observation  
Mental Health Case Conference  
Mental Health Assessment  
Mental Health Internal Referral for Services  
Mental Health External Referral for Services  
Mental Health Referral Resolution  
Staff/Internal Follow-up  
Family Communication  
**Case Conference**  
Observation  
LEA/PIRT Services Initiated in Classroom  
Communication with LEA/PIRT  
Transition-In Meeting  
Transition-Out Meeting  
IEP/IFSP Resolution  
Parent Refuses Services-Ongoing Support  
Select Option

Raco Verhaaren [Log]  
Filter  
Remove Filter  
Hide New Note [X]  
**Date**

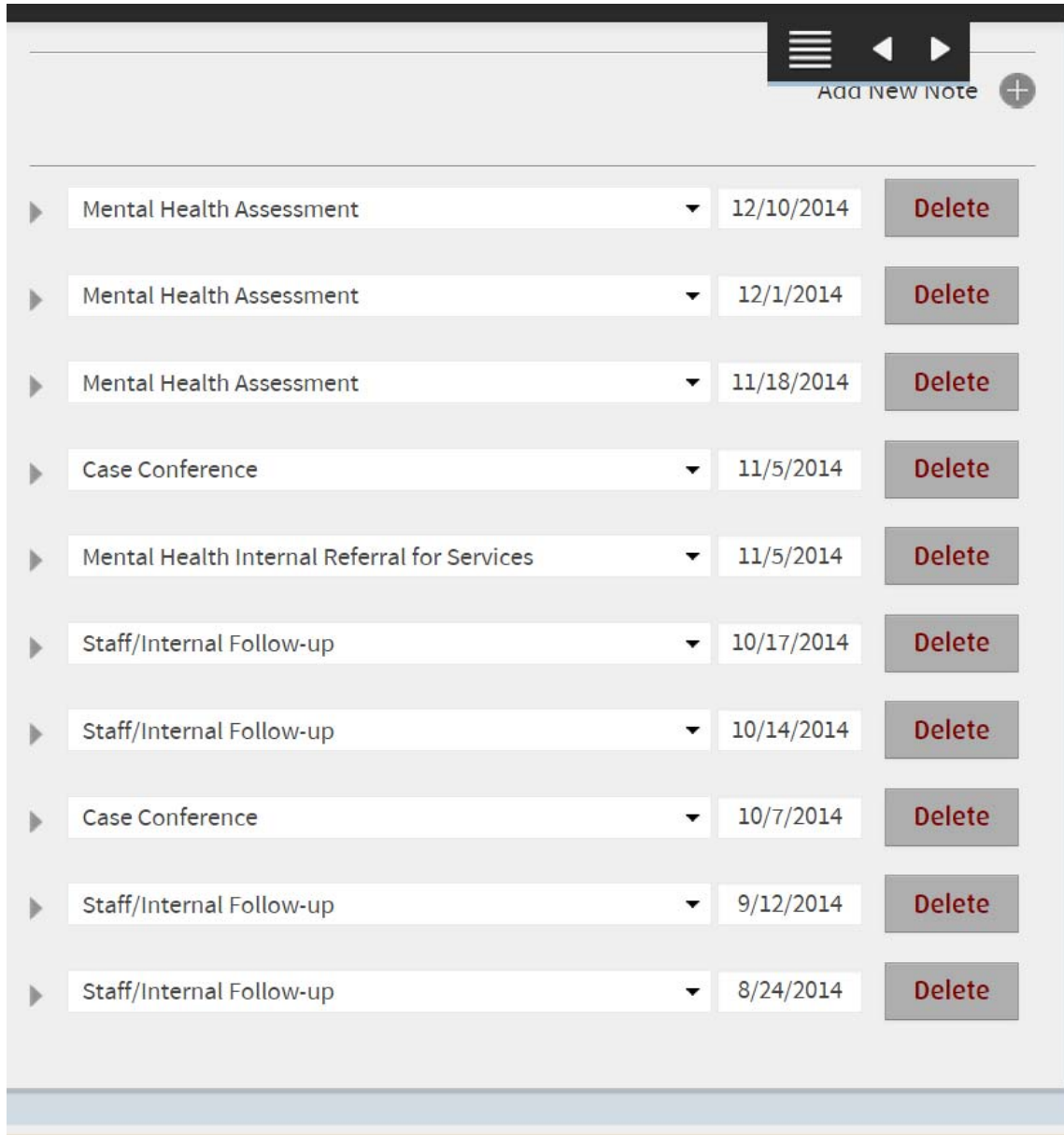
**NOTE DETAILS**

PIR Services  
Select Option  
Select Option  
Select Option

Associated with  
 Action Plan -  
 IEP/IFSP - 5/5/2014  
 Mental Health Notes

## Watch Out For

You may find instances where there are a whole bunch of notes under the IFSP section that belong to other areas (Mental Health, Action Plan, Etc.). This is because those notes have not had the 'Associated With' box checked that we discussed on the last page so they are attached to everything. This can be cleaned up by going in and attached those notes to the area they need to be attached to. Here is an example:



The screenshot shows a software interface with a list of notes. At the top right, there is a navigation bar with a hamburger menu icon, left and right arrow icons, and a button labeled "Add New Note" with a plus sign icon. Below this is a list of notes, each with a right-pointing triangle icon on the left, a dropdown menu containing the note's category, a date field, and a "Delete" button on the right.

Category	Date	Action
Mental Health Assessment	12/10/2014	Delete
Mental Health Assessment	12/1/2014	Delete
Mental Health Assessment	11/18/2014	Delete
Case Conference	11/5/2014	Delete
Mental Health Internal Referral for Services	11/5/2014	Delete
Staff/Internal Follow-up	10/17/2014	Delete
Staff/Internal Follow-up	10/14/2014	Delete
Case Conference	10/7/2014	Delete
Staff/Internal Follow-up	9/12/2014	Delete
Staff/Internal Follow-up	8/24/2014	Delete

All of these notes are attached to the IFSP even though they do not pertain to it. You may find it useful to clean this up so it is easier to find what you are looking for.