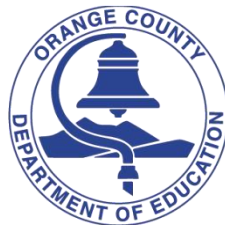


# IFSP Form Users Manual



WILLIAM M. HABERMEHL  
County Superintendent of Schools

Orange County Department of Education, Special Education Services

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## About the IFSP form

This IFSP was created by Orange County Department of Education to assist you in maintaining your Early Start records. This form is compatible with any version of MS Excel and can be used on either PC or Mac platforms.

For questions about the proper use of the IFSP, contact Dillon Henry at [dhenry@ocde.us](mailto:dhenry@ocde.us)

For technical questions about IFSP data entry, contact Robin Gurien at [rgurien@ocde.us](mailto:rgurien@ocde.us)

## Installing the IFSP Form

The IFSP Form is a template: an electronic file with a predesigned, customized format and structure. To ensure that you do not save this form as an individual Early Start file, you must save the document into your computer's templates folder.

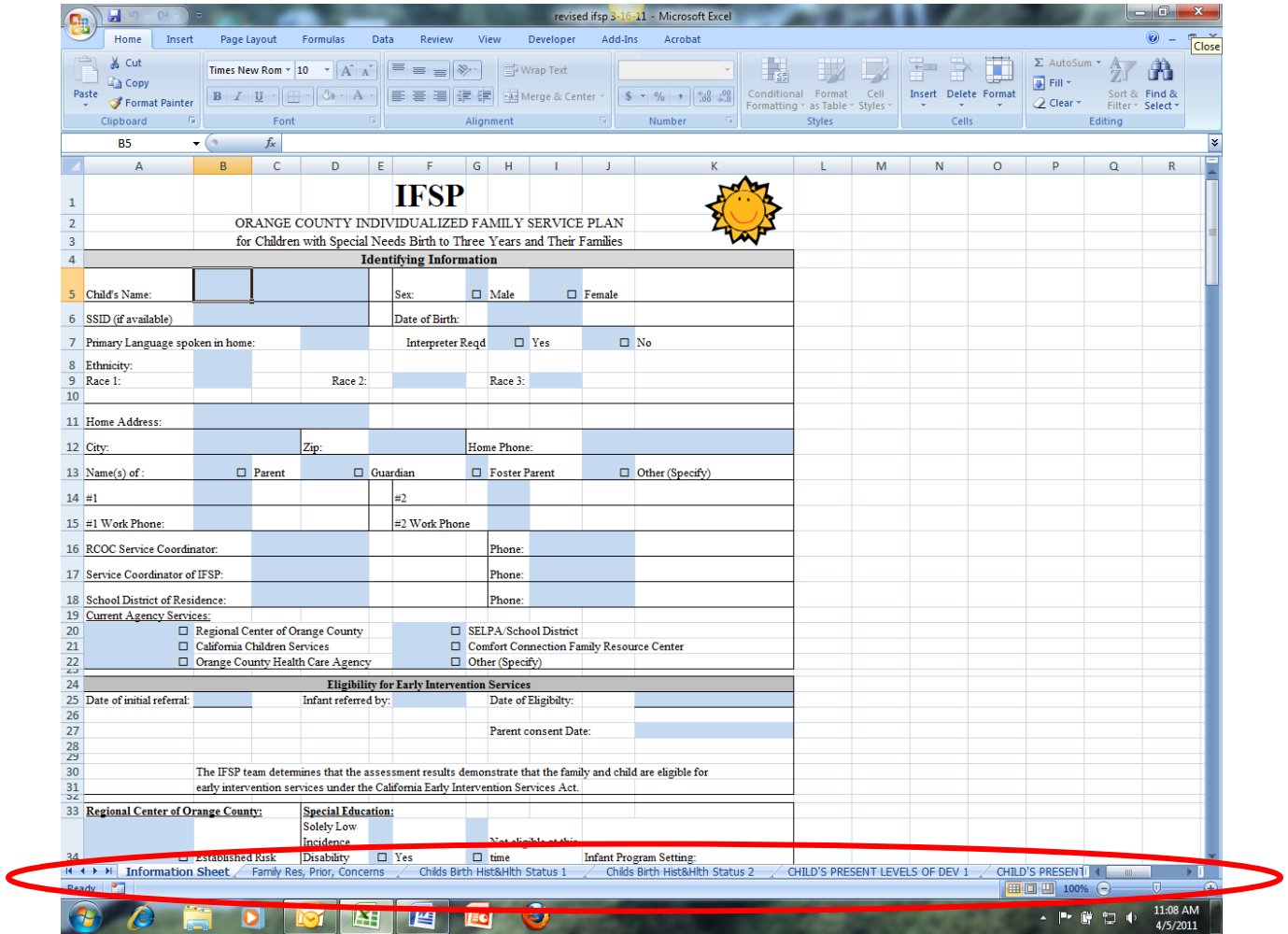
1. Click on the office button to open the drop down menu.
2. Choose the **Save As** option.
3. Choose the **Other formats** option.
4. Choose the **Save As** option to open the *Save As* dialog box.
5. Click on the **Save as type** option to open the drop down list.
6. Scroll through the list to find the Excel 97 - 2003 Template (\*.xlt) option

Once saved, your template is stored in the *templates* folder on your computer. To open the IFSP template, follow these steps:

1. Click on the office button to open the drop down menu.
2. Choose the **New** option.
3. In the **New Workbook** screen, select **My Templates**.
4. Select the **IFSP** icon and click "**OK.**"
5. A new IFSP form opens. You are ready to enter new data into the form.

# Finding Your Way through the IFSP Form

The IFSP form contains several pages. Each page is labeled and can be found in the worksheet bar on the bottom of the page.

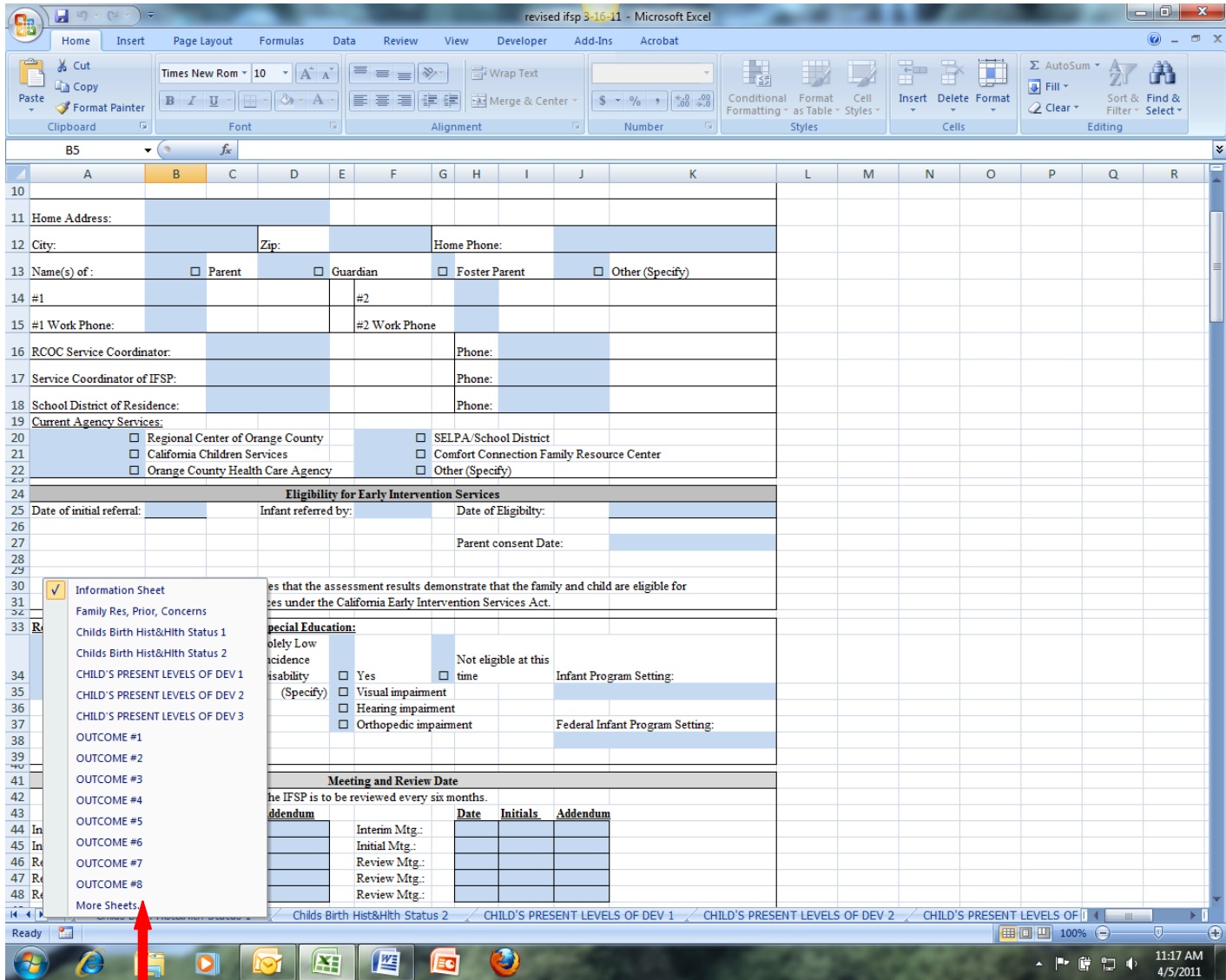


To go to a page, click on the tab in the worksheet bar:

The screenshot shows the Microsoft Excel interface with the following content:

- Title Bar:** revised ifsp 3-16-11 - Microsoft Excel
- Worksheet Bar:** Information Sheet, Family Res, Prior, Concerns, Childs Birth Hist&Hlth Status 1, Childs Birth Hist&Hlth Status 2, CHILD'S PRESENT LEVELS OF DEV 1, CHILD'S PRESENT LEVELS OF DEV 2
- Form Content:**
  - Section 1:** IFSP (with a sun icon)
  - Section 2:** ORANGE COUNTY INDIVIDUALIZED FAMILY SERVICE PLAN for Children with Special Needs Birth to Three Years and Their Families
  - Section 3: Identifying Information**
    - Child's Name: [ ] Sex:  Male  Female
    - SSID (if available): [ ] Date of Birth: [ ]
    - Primary Language spoken in home: [ ] Interpreter Req'd:  Yes  No
    - Ethnicity: [ ]
    - Race 1: [ ] Race 2: [ ] Race 3: [ ]
    - Home Address: [ ]
    - City: [ ] Zip: [ ] Home Phone: [ ]
    - Name(s) of:  Parent  Guardian  Foster Parent  Other (Specify)
    - #1: [ ] #2: [ ]
    - #1 Work Phone: [ ] #2 Work Phone: [ ]
    - RCOC Service Coordinator: [ ] Phone: [ ]
    - Service Coordinator of IFSP: [ ] Phone: [ ]
    - School District of Residence: [ ] Phone: [ ]
    - Current Agency Services:
      - Regional Center of Orange County  SELPA/School District
      - California Children Services  Comfort Connection Family Resource Center
      - Orange County Health Care Agency  Other (Specify)
  - Section 4: Eligibility for Early Intervention Services**
    - Date of initial referral: [ ] Infant referred by: [ ] Date of Eligibility: [ ]
    - Parent consent Date: [ ]
    - The IFSP team determines that the assessment results demonstrate that the family and child are eligible for early intervention services under the California Early Intervention Services Act.
  - Section 5: Regional Center of Orange County: Special Education:**
    - Established Risk  Solely Low Incidence Disability  Yes  Not eligible at this time
    - Infant Program Setting: [ ]

You may also right-click on the arrows to the left of the worksheet bar to see the full list of pages, and scroll down to select the page you want.



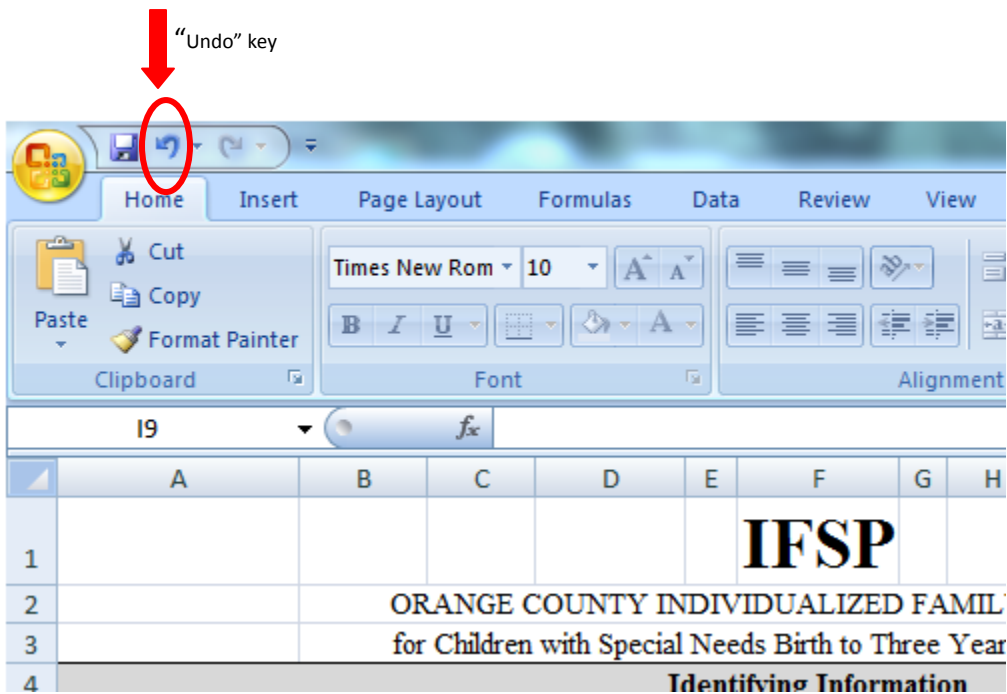
## Entering Data:

You may enter data only in the fields that are shaded. Use the “tab” key to move from field to field. Alternatively, you may move your mouse and click on the data field.

Some fields have check-boxes. To check the box, move the cursor into that field and press “x.” The box will be checked. To uncheck the box, click on the “undo” key.

Identifying Information	
Sex:	<input type="checkbox"/> Male <input type="checkbox"/> Female

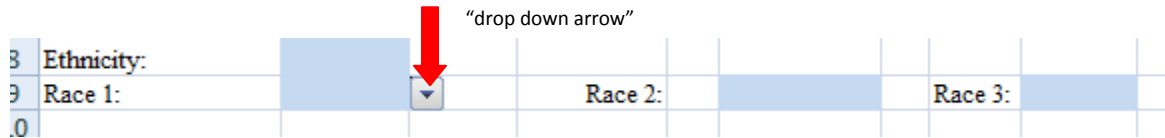
↑ “check box”





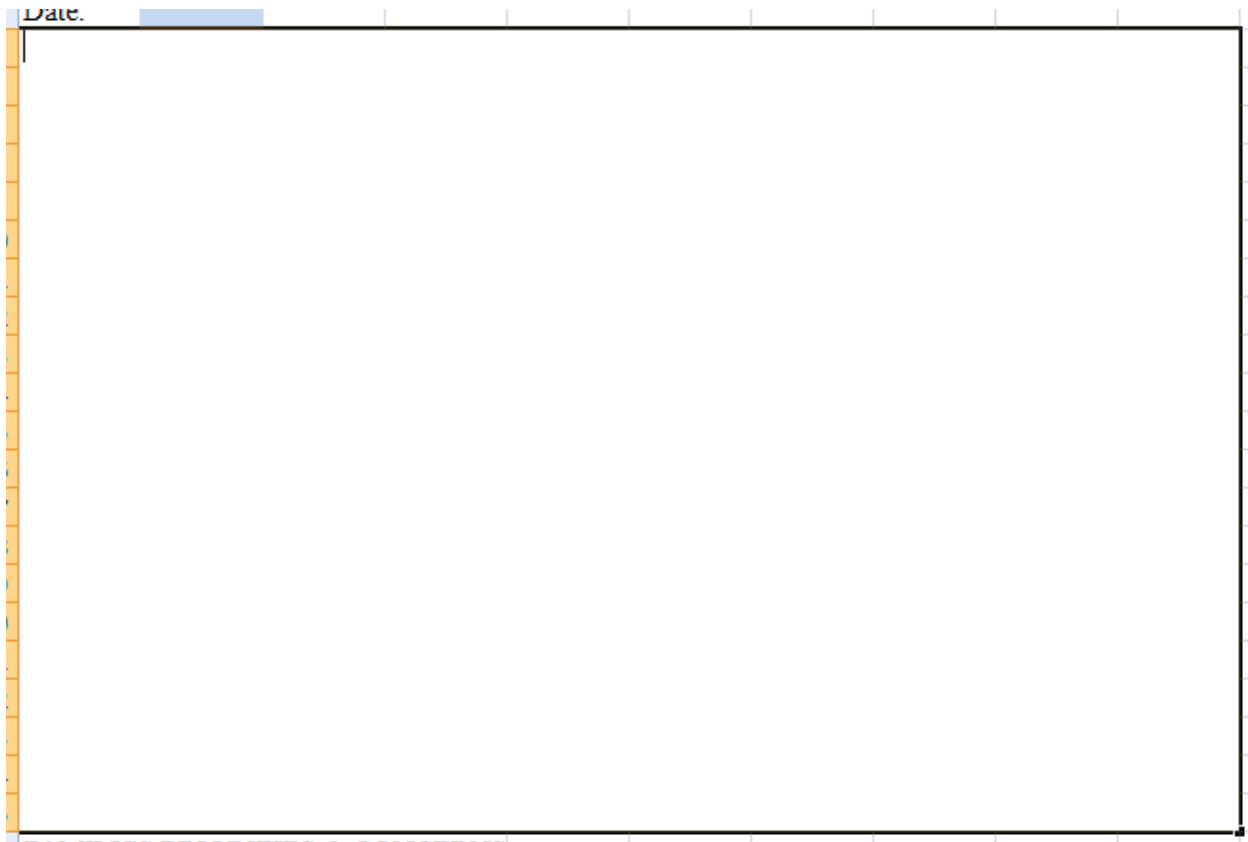
Some data fields have drop-down menus. The drop-down arrows will show up when you move the cursor into that field. Once the drop-down arrow appears, click on it and scroll to the correct list item. To delete the selected item, click on the “undo” key.

Race 1, Race 2, and Race 3 on the Information Sheet contain drop-down menus. To activate the menu, click the shaded field next to the item. A drop-down arrow will appear. Click on the drop-down arrow and scroll through the menu to the correct selection. The selection will appear in the field. To delete the selection, press the “undo” key.



Some drop down menus relate to specific fields in the CASEMIS reporting system. For further guidance on making the correct selections, please consult the CASEMIS manual or your supervisor.

To enter information into the large text boxes, double-click inside the text box. This will activate the cell, and a flashing cursor will be found in the upper-left corner of the box.

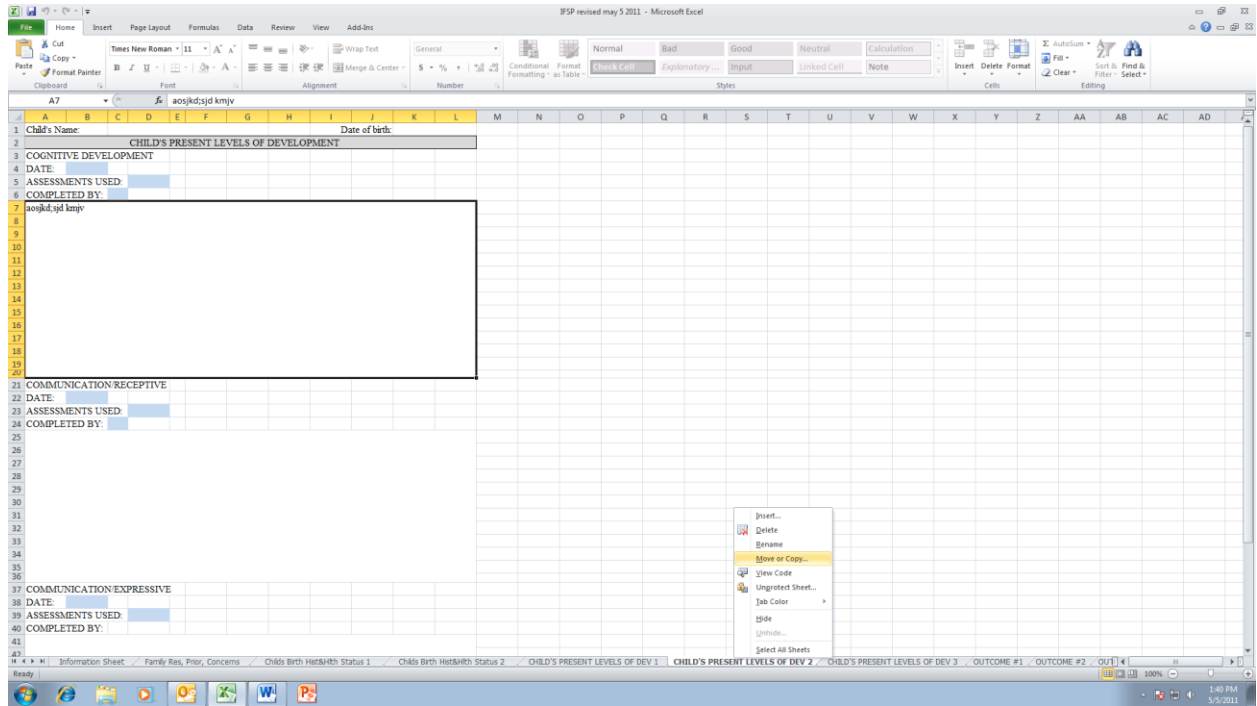
A screenshot of a software interface showing a large, empty text input field. The field is rectangular with a thin black border. At the top left of the field, the word "Date." is written in a small, dark font. A small, vertical, orange-colored bar is positioned to the left of the text "Date.", and a small, vertical, blue-colored bar is positioned to the right of the text "Date.". A small, vertical, orange-colored bar is also visible on the left side of the text box, indicating the start of the text entry area. The background of the text box is white. The overall appearance is that of a standard text input field in a software application.

You may write in this box as if you are using a word-processor, however DO NOT hit the “enter” key to start a new line. Instead, use “alt”+“enter.” Hitting only the “enter” key will move the cursor to the next text box.

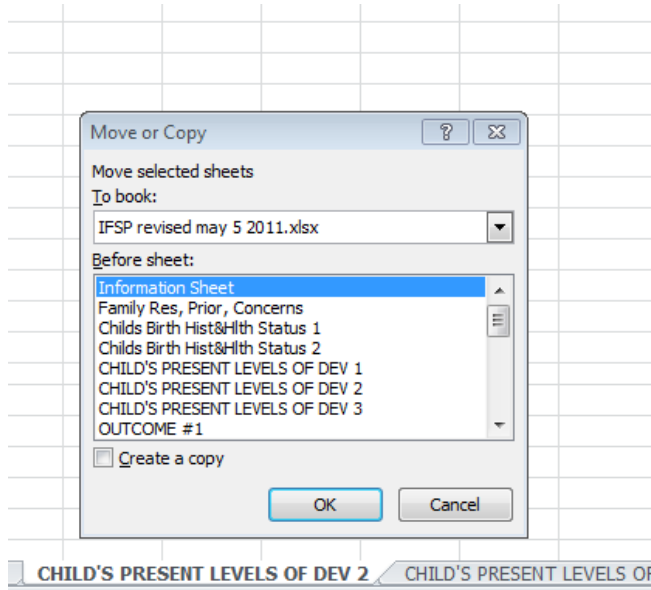
You may enter as much information as you would like. Any text that extends beyond the field borders will be saved and you will be able to see it on the screen. However, text that extends beyond the field borders will not print.



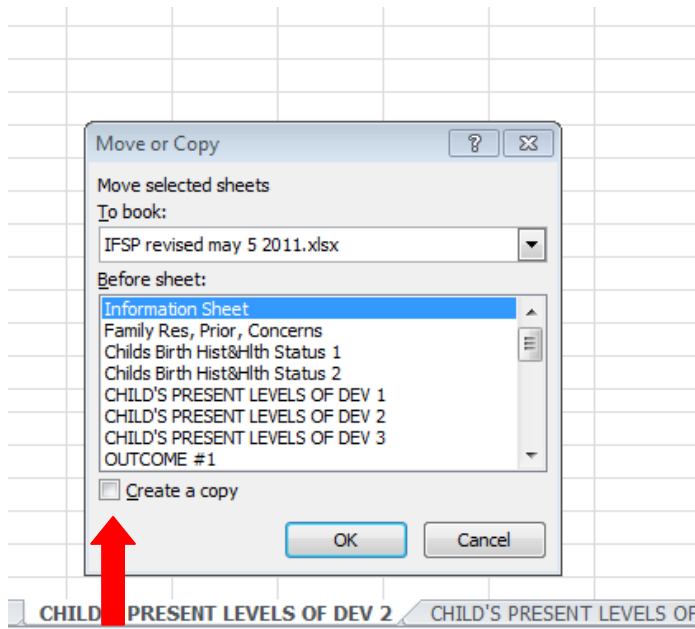
Select "move or copy" from the display menu



In the Move or Copy Display Box, select the sheet you would like this page to be placed in front of.

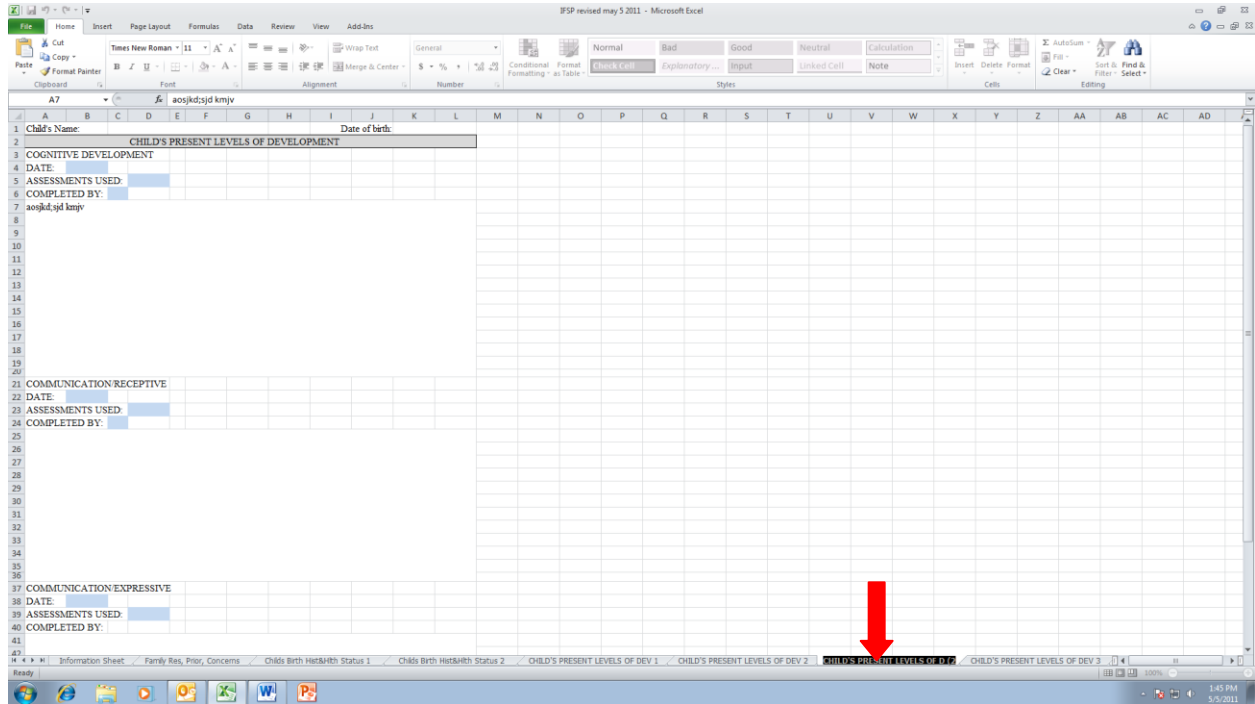


Click the "create a copy" box, and click OK



Your new page has been created. Because it is an exact copy of the original page, it will be named “Child’s present level of Dev 1 (2).” To rename the page,

Double-click on the worksheet tab



The worksheet tab will be highlighted. Click on the text and rename your folder. When you are done, click off the tab.

## Automatically-Populating Fields

Several fields on the IFSP form are designed to automatically populate. For example, once the child's name and date of birth have been entered on the information sheet, they will automatically populate onto all remaining IFSP pages.

The image shows a portion of an IFSP form. At the top right, the letters "IFSP" are visible. Below that, the text "ORANGE COUNTY INDIVIDUALIZ for Children with Special Needs Birth to" is partially visible. A grey header bar contains the text "Identifying Inf". Below this header, there are two columns: "Child's Name:" and "Sex:". The "Child's Name:" field is shaded light blue. A red arrow points from the "Child's Name:" field on the "Information Sheet" page (mentioned in the text above) to this shaded field.

Automatically-populating fields are not shaded, since the cells are locked from data-entry.

The image shows a portion of an IFSP form. At the top, the text "Automatically-populating field" is written. Below it, a red arrow points to a cell in a row with column headers A, B, C, and D. The cell under column C contains the text "Child's Name:". Below this row, the text "FAMILY RESOURCES, I" is visible. The "Child's Name:" field is not shaded.

Similarly, each Outcome number will automatically populate on the Summary of Early Intervention Services pages to help the user document the services related to meeting each Outcome.

<b>IFSP OUTCOME</b>			
The family identifies what they v			
For each concern ide			
Date:			
OUTCOME #:	0		

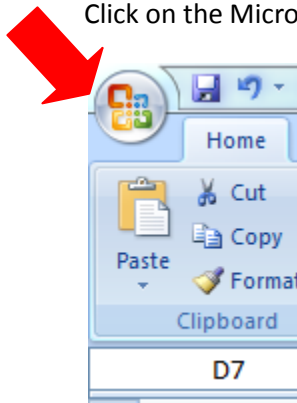
Child's Name	0	
<b>Summary of Early Interv</b>		
Services will be provided according to the availability the program calendar and scheduled service		
Outcome #	Service	Service Pr
0		
Location (S... natural environment)	Justificatio	



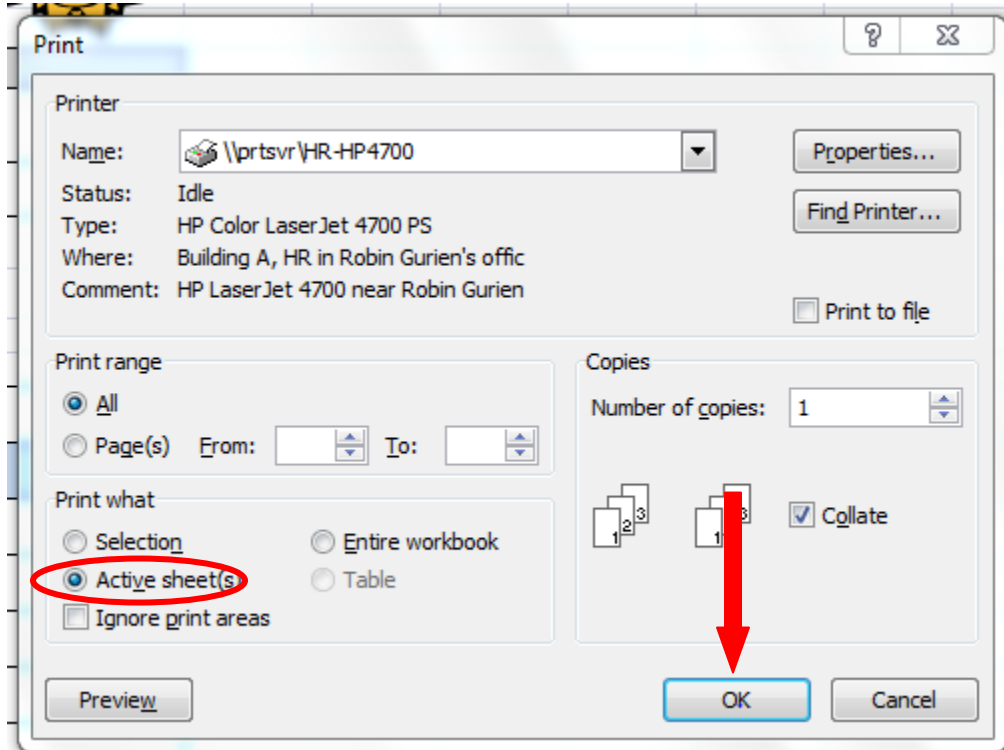
## Printing the IFSP Form

**To print the current page only:**

Click on the Microsoft Office button and select the print icon.

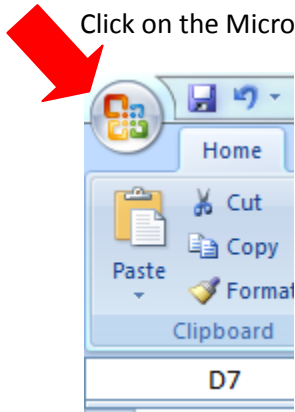


In the "Print" screen, select "Active Sheet" and press the "ok" button

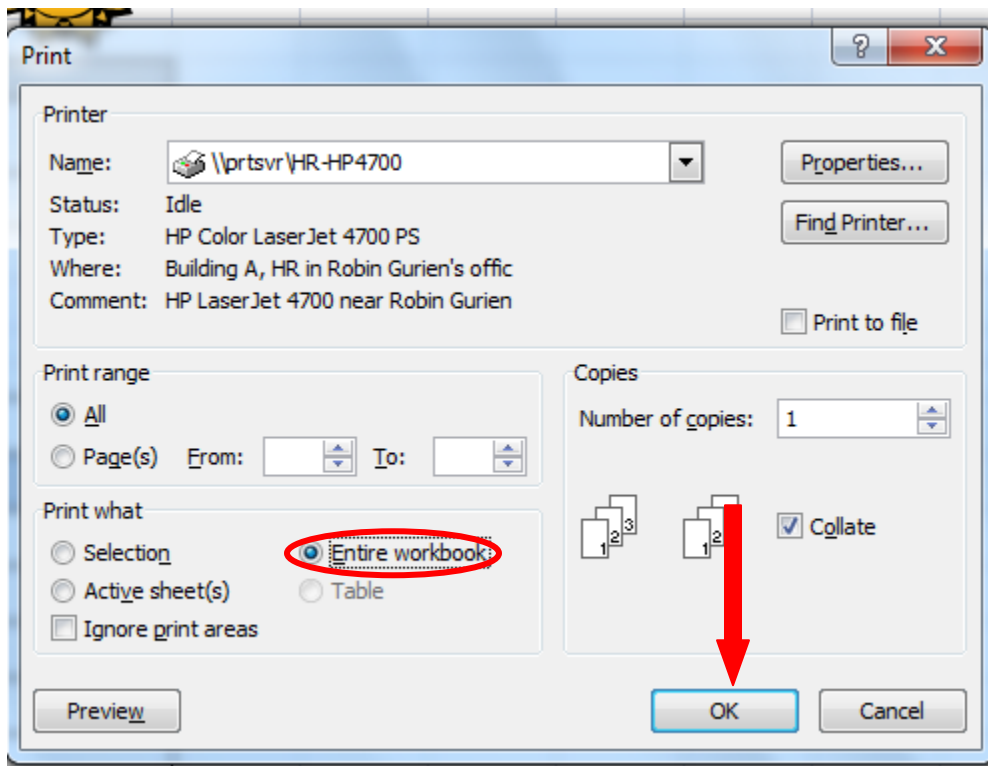


To print the entire form:

Click on the Microsoft Office button and select the print icon.



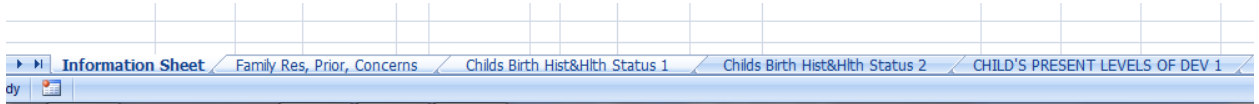
In the "Print" screen, select "Entire workbook" and press the "ok" button



**To print a sub-set of pages, for example, only the pages which include data:**

First hold the “ctrl” key and click on the tabs to select the pages you would like to print.

*For example, in the screen below, the Information Sheet, Family Resources, Priorities and Concerns Sheet, and the Child’s Birth History and Health Status #1 Sheet are selected. Only these sheets will be printed.*



Next, follow the directions to “print the current page,” on Page 17 of this document.

NOTE: All page numbers will automatically adjust according to the number of pages selected to print.

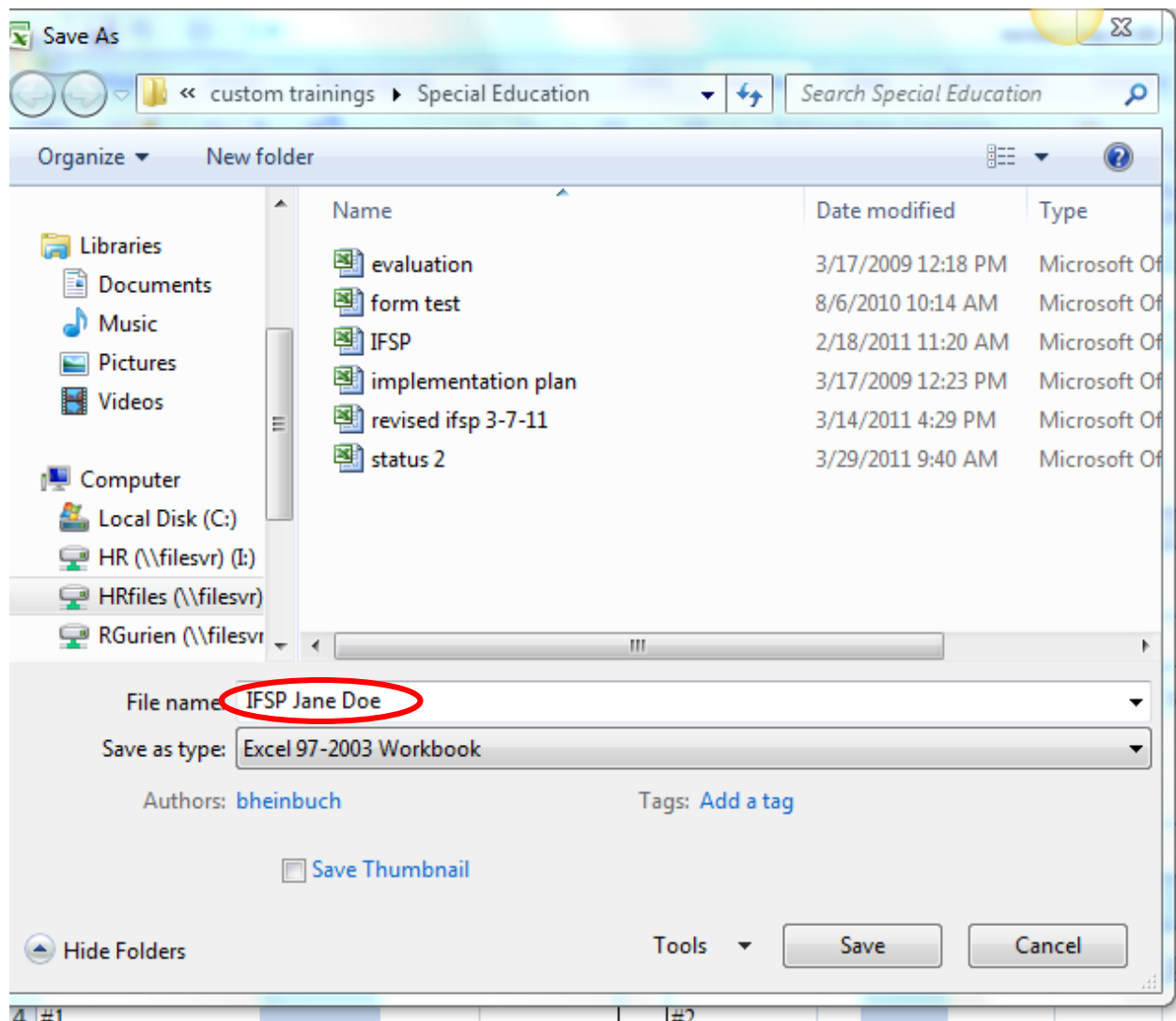
## Saving the IFSP form

The IFSP form is a template. To preserve the document for each individual child, you must save each IFSP with a different name.

In the Microsoft Office Button, select “Save As.”

Name the document, for example “IFSP Jane Doe 4.25.11”.

Select the software format you would like to save the child’s IFSP document in. Hint: since newer versions of MS Excel are not compatible with other formats, you may prefer to save your form as an Excel 97-2003 document.



The next time you need to add information to the child's IFSP form, you may add information directly to the form you saved previously and rename the updated document.

Your SELPA may wish to determine a consistent format for naming/saving new IFSP documents and create a central system for storing/backing up these Early Start records.