**To Add Concern:**

1. Click Services Tab
2. Select the child
3. Click Disability tab
4. Click Add Concern
   * **Date Identified:** When concern was identified (note that concern may already be added at time of application)
   * **Category:** Choose the area of development (if more than one, add another concern)
   * **Status:** Choose Status
   * **LEA or Part C Agency:** Choose the correct Local Education Agency
   * **Responsible Staff:** CFS Name
   * **Time Stamp:** time stamp icon and type in any notes
5. Click Save

**To Close a Concern**

1. Click Services Tab
2. Select the child
3. Click on Disability Tab
4. Locate the Concern and choose “Close Concern”
   * **Date:** choose the date to close the concern
   * **Reason Closed:** Choose reason for closing the concern
   * **Responsible Staff:** Choose the staff member working with the child
   * **Time Stamp** and add any notes
5. Click Save

**To Add an IFSP**

1. Click on the Services Tab
2. Select the child
3. Click on the Disability Tab
4. Click on IFSP Tab
5. Click on Add IFSP \*note that a new IFSP is added for each document (initial and 6 mo reviews)
   * **Date:** choose the date of the IFSP
   * **Type:** Choose the type of document (initial or a review or other)
   * **Responsible Staff:** Choose the staff member working with the child
   * **Part C Agency:** Choose the ISD agency responsible for writing the IFSP
   * **Disability:** Choose the disability(s) identified in the IFSP (a drop-down appears next to the first one checked, if more than one disability, click primary and check box next to the disabilities labeled in the IFSP)
   * **Specific Condition:** Type in a specific condition identified in the IFSP
   * **Received Services:** should be YES
   * **Notes:** Timestamp and add any notes
6. Click Save

**To Close an IFSP**

1. Click on the Services Tab
2. Select the child
3. Click on the Disability Tab
4. Click on the IFSP Tab
5. Click Close IFSP
   * **Date:** Chose the date the IFSP is closed
   * **Type:** Choose the type of document that identifies the IFSP as “closed”
   * **Responsible Staff:** CFS Name
   * P**art C Agency:** Choose the ISD Agency responsible for writing the document
   * **Disability and Specific Conditions will be automatically identified**
   * **IFSP will be automatically labeled as “closed”**
   * **Closed Reason:** Choose the reason for closing the IFSP (must close an IFSP when adding an IEP)
   * **Notes:** Timestamp and add any notes
6. Click Save

**To Add an IEP**

1. Click on the Services Tab
2. Select the child
3. Click on the Disability Tab
4. If any IFSP’s are open Close them
5. Click on the IEP Tab
6. Click on Add IEP
   * **Date:** choose the date of the IEP
   * **Type:** Choose the type of document (initial or a review or other)
   * **Responsible Staff:** CFS Name
   * **LEA:** Choose the ISD responsible for writing the IEP
   * **Disability:** Choose the disability identified in the IEP (a drop-down appears next to the first one checked, if more than one disability, click primary and check the box next to the disabilities labeled in the IEP)
   * **Specific Condition:** Type in a specific condition identified in the IEP
   * **Received Services:** Click yes
   * **Notes:** Timestamp and add any notes
7. Click Save