

# File Set Up Guide

## Enrollment

ERSEA Uploads Initial Paperwork

Family Advocate Uploads  
Updates/Annual Paperwork

### Application Under Parent Attachment

- Income Documentation (Pay Stub, SSI, TANF Statement, Statement of No Income.
- Child Care Subsidy Paperwork (CCAP, Aspire, Transitional) \_\_\_NA**
- Fee Agreement- From Finance

### Application Under Child Attachment

- Birth Certificate
- Maine Care or Insurance Card
- Head Start Eligibility Verification Form
- Signed Application
- Internal Transition Form \_\_\_NA**

### Enrollment Attachment Under Child

- CACFP Form
- Permission for Services (+ Continued annually)
- Enrollment Activity Sheets
- Internal Transition Form (As Applicable)**

## Family Services

### Family Services Events

- Family Goal
- Strength Identified
- Attendance discussions / Follow Up \_\_\_NA**
- Parent Education/Training attendance
- Documentation of Family Needs/Referrals
- Family Partnership Documentation
- Parent Involvement

### Family Services Outcomes Assessment Module

- Family Outcomes Assessment 1&2

### Family Services Attachment

- Receipt of Parent Handbook
- Attendance Plans \_\_\_NA**
- Family Correspondence (Letters sent to family) \_\_\_NA**
- Divorce/Custody/Protection Order \_\_\_NA**
- Family Case Manager Releases \_\_\_NA**
- DHHS Child Protective Report Form, Safety Plans, Team meetings , releases, etc. \_\_\_NA**
- Home Emergency and Safety Check List
- Confidentiality Statement
- Parent Agreement
- Parent Education Survey
- Subsidy Release \_\_\_NA**
- Hopes & Dreams worksheet (optional)
- Who is in my Family Activity (optional)
- Wheel of Life activity (optional)
- Plan Do Review (optional)

# File Set Up Guide

## Mental Health & Disabilities

- NA Disability
- NA Mental Health

### Disability Concerns- Open Concern

- Log all developmental concerns here

### Add Activity

- Conversations about identified concern
- Log referrals, evaluations, CDS observations conducted prior to IFSP/IEP

### Disability Attachment Under Child

- Disability referrals to other agencies for (CDS, Spurwink, etc.)
- Release of Information and Consent Form for CDS or special services
- Copy of IFSP / IEP
- Evaluation Reports and Plans of Care for special services
- Progress notes from providers
- IFSP/IEP Report from Teacher
- Permission form for weighted blanket at nap

### IFSP or IEP tab-Add Activity

- Conversations about IFSP/IEP or special education services
- Log all reliable activity: CDS observations, evaluations, CDS team meetings, any follow-up related to IFSP/IEP

### Mental Health Transaction

- Referral to Mental Health Services
- Release of Information and Consent Form for mental health services

### Mental Health Attachment

- Individual Mental Health Observation

### Mental Health Observation

- Individual Mental Health Report/Assessment

## Education

### Education Event

- ASQ/ASQ SE EHS (Date Completed)
- Brigance SE (date completed by parent)/ completed by teacher if parent does not complete within 45 days
- Brigance Screening HS and Rescreen as Applicable
- TSG Assessment completed- Fall/Winter/Spring
- Toileting Plan** \_\_\_NA
- Home Visits (including summary of visit)
- Parent Teacher Conferences
- Child Goal set (including summary of goal)
- Bus Safety (3x a year in public schools)** \_\_\_NA
- Pedestrian Safety
- K Readiness Form complete** \_\_\_NA
- K Transition Activity** \_\_\_NA
- Personal Safety
- Meeting with parent re: concerns for learning** \_\_\_NA
- Classroom visit by parent and child** \_\_\_NA
- Schedule modification conversations** \_\_\_NA
- Home language/Child language use survey complete**
- Pre LAS complete (with score and level)** \_\_\_NA
- PreK enrollment online completed** \_\_\_NA
- Crib to cot parental waiver** \_\_\_NA

### Education Attachment

- Copy of Brigance Online Screening Summary and Rescreen as Applicable
- Copy of Brigance Self Help and Social Emotional Scales- Parent Report Complete
- Copy ASQ/ASQ SE Online Summary

# File Set Up Guide

- M-Chat Results** \_\_\_NA
- TSG Child Profile & TSG Observations (annually)
- Positive Behavior Support Plan
- TSG Family Conference Form/Report Card - Fall/Winter/Spring
- Special Education Resources provided
- Kindergarten Readiness Form (Prior to trans. into kindergarten)** \_\_\_NA
- Home Language Survey

## HEALTH

### Health- Attachment

- Authorization to Release Info - PCP
- Authorization to Release Info - Dental
- Hearing/Vision Screener Result Letter
- Audiologist Exam Report** \_\_\_NA
- Ophthalmologists Exam Report** \_\_\_NA
- Food Allergies and Dietary Restrictions Form** \_\_\_NA
- Permission for Lead Screening
- Individual Health Plan (If Applicable)** \_\_\_NA
- Physician Note (RTS, Care Plan)** \_\_\_NA
- Physicians Health Plan** \_\_\_NA
- Dental Application
- Dental Exam Report (1-5 yr old)** \_\_\_NA
- Dental Hygiene Report**
- Medication Incident Report- If Applicable**
- Lead Level Results Letter
- Asthma No Med Form**
- Parent signed Incident Report**
- Food Allergy Plan by Physician**
- Well Child/Baby Exam Reports
- Controlled Medication Daily Log**
- Record of Medication Given Log**
- Medication Authorization Form**
- Immunization Licensing Plan** \_\_\_NA
- Nutrition Assessment Form

### Health- Incident Report

- IR without parent signature** \_\_\_NA  
\*IR with parent signature uploaded in Health Attachments\*

### Immunization Tab

- Immunization Status

### Immunization Tab-Attachment

- Immunization Records (from Impact)
- Immunization Exempt Form (If Applicable)** \_\_\_NA

### Health Information Tab

- Food Allergies** \_\_\_NA
- Chronic Health Condition** \_\_\_NA
- Medical Home
- Dental Home
- Health Insurance
- WIC** NA