



BTOTS User Group
Thursday, February 11, 2010
10 am – 12 pm
Conference Call

Participants: Vanya Mabey, Catherine Hoelscher, Lynne MacLeod, Brent Baum, Josiah Hawks, Chris Wnek, Aihua Tong, Ken Bailey, Mike Spackman, Central, Davis, DDI VANTAGE, Jordan CDC, KOTM, KWC, PEIP, PT4K, SEUHD, Summit, TLC, Up to 3, Weber

Minutes

- I. General/Reminders
 - a. BTOTS Web blog: Please be sure to read and comment on the blog. We want as much provider input as possible, and so far provider participation has been very low. If any other EI staff want to be aware of updates to the blog, have them send a blank email to subscribe-hl-btotsweb@list.utah.gov to join the BTOTS Web Listserv.
 - b. Children Under IFSP Report – Classes/Service Methods: this report will show you all children currently enrolled, and any classes they may be enrolled in.

- II. BTOTS 2.8.1 Update (see handout beginning on [page 2](#) for details)
 - a. Reconciled TEDI Exit Reasons
 - i. Exit reasons are to be reconciled going back to 7/1/08.
 - ii. For each batch of kids turning 3 in a given year, the reconciliation process for that year must be completed by September 1 of that year.
 - iii. Since we're going back to 7/1/08 on this first go-around, the batch of kids to be reconciled by Sept. 2010 will be bigger than usual. After Sept. 2010, the number of kids to reconcile each year should be a much more reasonable amount.
 - b. Service Settings/Service Intensity
 - i. For Individual services that are done at the EI Provider location, BWEI suggests using 'Other: EI Center' as the service setting.
 - c. Bug fixes
 - i. There will be a follow up 2.8.2 update that will address more bug issues.

- III. Questions/Comments
 - a. Q: How do other providers handle entering the Interpreter going on an IFSP visit?
A: The consensus was that most providers don't bother putting that into BTOTS, but the info is in the paper file. One optional way of keeping track of kids that use an interpreter is to add a Custom Flag (Tools → Options). This, however, can't be used to track when an interpreter goes out on a visit.
 - b. Q: What is the procedure if a Medical Diagnosis is not in BTOTS?
A: See [October 29, 2009 BUG minutes](#).

- IV. Next Meeting: March 11, 2010

1. TEDI Discrepancy Reconciliation Process

General Overview of TEDI

The Transition from Early Intervention (to Preschool) Data Input System (TEDI) is the Part B database that tracks and exchanges with BTOTS the Part B eligibility status of Part C children whose directory information has been disclosed to Part B. Just as Part C must report data federally on children who have exited from the Part C system each year, Part B must also report annually on the eligibility status of children from all referral sources (the Baby Watch Early Intervention Program (BWEIP) is one source) who enter the Part B system. In previous years, Part C exit data and Part B eligibility data related to Part C referrals submitted for federal 618 reporting have not matched. This difference is one of the reasons for developing TEDI, an electronic method of tracking children referred from one system to the other.

A child’s final Part B eligibility status *on or before the child’s third birthday* is not always known to providers when they exit the child from BTOTS and so often the state exit reason of ‘Part B eligibility undetermined’ is selected to exit the child. For the last two years, BWEIP attempted to obtain the final eligibility status of all children with this state exit reason directly from Part B in preparing 618 data, but the process was cumbersome and time-consuming for all parties involved. In the future, through the information exchange between BTOTS and TEDI, an automated process will be in place to assist providers in obtaining a child’s final Part B eligibility status so that they can update the exit reason, if needed. It is anticipated that this process will result in Part C and Part B being able to report federal data that aligns more accurately than in the past.

Information Sent to TEDI from BTOTS

Two types of information will be sent *on a nightly basis* to TEDI from BTOTS, as shown in the table below:

<p>1. Demographic information</p> <ul style="list-style-type: none"> a. Child’s first and last names b. Child’s date of birth c. Child’s gender d. Child’s contact names and phone numbers e. Child’s primary language <p>This information will be sent for any children who <i>newly meet</i> the exchange criteria (i.e., the child is 27 months of age; not opted out; and enrolled in Part C).</p>	<p>2. Updated transition meeting information</p> <ul style="list-style-type: none"> a. Transition meeting status b. Transition meeting date c. Transition notes <p>This information will be sent for any children whose directory information <i>has already been disclosed</i> to the Part B TEDI system.</p>
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Information sent to BTOTS from TEDI

Part B users will enter a child's Part B eligibility status in TEDI as 'Eligible' (for Part B), 'Not Eligible' (for Part B), or 'Unable to Complete' (the eligibility determination process). The eligibility status will be available to be sent to BTOTS *on the next nightly information exchange* when the following three conditions are met:

1. the Part B eligibility determination process has been finalized and documented in TEDI as either
 - a. completed (i.e., the eligibility status and the date of the eligibility meeting are both entered in TEDI) **OR**
 - b. unable to be completed (i.e., the reason for the process not being finished and the date it was determined the eligibility could not be completed documented in TEDI);
2. the child has turned three; and
3. the provider has exited the child in BTOTS.

How the Discrepancy Reconciliation Process Works in BTOTS

A new process has been added to BTOTS to determine whether a child's Part B eligibility status *on or before the child's third birthday* coming from TEDI matches the state or federal exit reason that the provider selected to exit the child from Part C. Located under the 'Provider' tab in BTOTS, the 'Reconcile TEDI Exit Reasons' form will be used to update BTOTS with the new information from TEDI by:

- 1) alerting the provider of discrepancies between TEDI and BTOTS;
- 2) giving the provider control over changing the existing Part C state or federal exit reason field in BTOTS; and
- 3) showing the change history of the Part C exit reason field.

If the information from TEDI matches the Part C state or federal exit reason already entered in BTOTS for a child, there is no discrepancy and no provider action/intervention is required. However, when a child's TEDI Part B eligibility status *on or before the child's third birthday* and the existing Part C state or federal exit reason do not match, the provider will receive an alert in BTOTS about the discrepancy that will need to be reconciled using the form.

To assist providers with the reconciliation process, "probable" options to resolve the non match or discrepancy between a child's Part B eligibility status and existing Part C state and federal exit reason will be presented in a drop-down list on the 'Reconcile TEDI Exit Reasons' form. For some Part B eligibility statuses, there may be multiple Part C exit reasons suggested as a possible matching option. In these cases, the provider will have to determine which option best fits the circumstances under which the child exited Part C services.

NOTE: With the introduction of the 'Reconcile TEDI Exit Reasons' form and reconciliation process in BTOTS, state exit reasons associated with the 'Part B eligibility undetermined' category will be updated to align with TEDI 'Unable to Complete' reasons. The currently used state exit reason of 'Part B eligibility undetermined—referred, eval. incompleting before 3' will be rewritten as 'Part B eligibility undetermined—referred, eligibility not determined prior to 3rd

birthday.’ It is anticipated that the currently used ‘Part B eligibility undetermined—referred, results unavailable’ state exit reason will be no longer be needed in BTOTS because the status of a child’s Part B eligibility determination *on or before the child’s third birthday* will now be available through TEDI. Finally, a new state exit reason of ‘Part B eligibility undetermined—transition meeting declined’ will be added to the list, to cover the situation where the transition meeting is declined (i.e., meeting status is set to ‘Declined’ in BTOTS) and a child exited Part C at three with none of the other federal exit reasons (e.g., completion of IFSP by three, deceased, moved out of state, withdrawn, or attempts to contact unsuccessful) appropriate selections.

The “probable” matching options and changes in state exit reasons associated with ‘Part B eligibility undetermined’ are shown in the table below.

If the Part B Eligibility Status <i>on or before the 3rd birthday</i> from TEDI is ...	Then the probable Part C State or Federal Exit Reason(s) in BTOTS will be ...
Eligible	Part B eligible
Not eligible	1. Not eligible for Part B, exit with no referrals OR 2. Not eligible for Part B, exit with referrals to other programs
Unable to complete—parent refused	Part B eligibility undetermined—parent refused (Part B evaluation/testing at or after transition meeting) (<i>NOTE: will replace current reasons ‘Part B eligibility undetermined—family declined eval., unscheduled’ and ‘Part B eligibility undetermined—scheduled, family no-show’</i>)
Unable to complete—child deceased	Deceased (<i>NOTE: will replace current reason ‘Part B eligibility undetermined—other’</i>)
Unable to complete—family moved	Moved out of state (<i>NOTE: will replace current reason ‘Part B eligibility undetermined—other’</i>)
Unable to complete—eligibility not determined prior to third birthday	Part B eligibility undetermined—eligibility not determined prior to third birthday

‘Reconcile TEDI Exit Reasons’ Form Overview

The 'Reconciled TEDI Exit Reasons' form will display the following information:

- Child’s first and last names
- BTOTS Child ID
- Existing (e.g., ‘original’) Part C state or federal exit reason
- Part B Eligibility Status (coming from TEDI *on or before the child’s third birthday*)
- Match Status (Reconciled Match, Non Match)

Child’s Reconciliation Status (Status Key)

To the left of each child’s name is an icon that shows the child’s reconciliation status (indicated by the **orange** arrow). On the right of the form is a ‘Status Key’ (indicated with an **red** arrow) for the two icons, which are described in the table below.


Status Key	
✔ Reconciled Match	The 'Reconciled Match' icon indicates that the existing (e.g., 'original') Part C state or federal exit reason in BTOTS and Part B eligibility status coming from TEDI were discrepant but have been reconciled and now match, due to reconciliation process. <i>Provider action/intervention is required to reconcile these discrepancies between BTOTS and TEDI.</i>
✘ Non Match	The 'Non Match' icon indicates that the existing (e.g., 'original') Part C state or federal exit reason in BTOTS and the Part B eligibility status from TEDI do not match and need to be reconciled. <i>Provider action/intervention is required to reconcile these discrepancies between BTOTS and TEDI.</i>

The default setting for the form is to show the children with a 'Non Match' status only. Children with a 'Reconciled Match' status can also be displayed by checking the 'Include Previously Reconciled in List' box in the upper right hand side of the screen (indicated by the blue arrow).

How to Reconcile Discrepancies

To reconcile discrepancies between the Part C state or federal exit reason and Part B eligibility status for a child, first highlight the child's name in the list. This action will display detail information for the child at the bottom of the screen. The left side of the screen shows the 'Part C (BTOTS)' section (indicated by the yellow arrow) where the updated and original Part C exit reasons will be displayed. The right side of the screen shows the 'Part B (TEDI)' section (indicated by the green arrow) where the Part B eligibility status will be displayed.

BTOTS 2.8.1 Updates—February 2010

Clicking the left arrow button  (indicated by the purple arrow) will begin the reconciliation process for a single child. If there is a **one-to-one match** between the TEDI Part B eligibility status and the BTOTS exit reason, the reconciliation will proceed automatically when the left arrow button is clicked. However, if the TEDI eligibility status maps to **multiple** possible BTOTS exit reasons, then the provider must select the correct Part C state or federal exit reason from the Part C (BTOTS) drop-down list.

Once the reconciliation process is complete, the updated Part C exit reason will replace the existing reason and be displayed in the 'Exit Reason' field on the Child tab, Enrollment sub-tab for the child in BTOTS (indicated by the turquoise arrow). The original reason will be stored in the 'Original Provider Exit Reason' field (indicated by the green arrow) and displayed with the date the field was last reconciled ['Part B Reconciled' date' (indicated by the pink arrow)] on the Child tab, Enrollment sub-tab for the child in BTOTS.

Using the ‘Auto-Reconcile’ Option

The ‘Auto-Reconcile’ feature can be used to reconcile automatically all of the children whose Part B eligibility status coming from TEDI maps to a *single* Part C state or federal exit reason in BTOTS, rather than doing it one child at a time. To perform a multiple-child reconciliation, click on the 'Auto-Reconcile' button, located on the lower left hand side of the screen (indicated by the **black** arrow). For those children whose Part B eligibility status maps to **multiple** possible BTOTS exit reasons, the ‘Auto-Reconcile’ feature cannot be used to complete the reconciliation process. In this situation, the reconciliation process will have to be completed manually for each child, because it require provider action/intervention to select the correct Part C state or federal exit reason from the drop-down list.

The screenshot shows the 'Reconciled TEDI Exit Reasons - Children Turning 3 between 10/1/2007 and 10/22/2009' window. It features a table of children with columns for Child, Child ID, Part C Exit Reason, Part B Eligibility Status, and Status. A dialog box titled 'Auto-reconcile' is open, asking for confirmation to change exit reasons for 13 non-match reasons. Below the table, the 'Reconcile Details for Lydia Evans (KK05238)' are shown, including buttons for 'View', 'Undo', and 'Auto-reconcile' (indicated by a black arrow).

Child	Child ID	Part C Exit Reason	Part B Eligibility Status	Status
X Rasmussen, Timothy	KK07032	Part B elig. undetermined...	Unable to complete - Par...	Non Match
X Morales, Jordan	KK06893	Part B elig. undetermined...	Unable to complete - Par...	Non Match
X Curtis, Angel	KK06785	Part B eligible	Not Eligible	Non Match
X Johnson, Carolina	KK07741	Part B eligible	Not Eligible	Non Match
X Sylvester, Colton Ri...	KK05294	Part B elig. undetermined...	Unable to complete - Par...	Non Match
X Porter, Adam	KK05057	Part B elig. undetermined...	Unable to complete - Par...	Non Match
X Trujillo, Carter	KK07111			
X Roberts, Melinda As...	KK0795			
X Grant, Mike	KK0768			
X Reyes, Jackson	KK0710			
X Fernandez, Zachary	KK0711			
X Spencer, Chad Fran...	KK0619			
X Porter, Jeffrey Aaron	KK0783			
X Romero, Jake	KK0793			
X Thomson, Ricardo	KK0710			
X Kimball, Trevor Justin	KK0532			
X Arnold, Amber Jill	KK0766			
X Lewis, Isaac	KK0759			
X Rivera, Jordan	KK071071	Part B elig. undetermined...	Unable to complete - Par...	Non Match
X Rhoades, Carmen	KK061085	Not eligible for Part B, exi...	Eligible	Non Match

Reconcile Details for Lydia Evans (KK05238)

Part C (BTOTS): Part C Exit Reason: Part B eligible

Part B (TEDI): Part B Eligibility Status: Not Eligible

Buttons: View, Undo, Auto-reconcile, Close, Help

Summary: 79 Total, 1 Reconciled, 78 Non Matches

‘Undo’-ing the Reconciliation Process

If a mistake is made during the reconciliation process, clicking the 'Undo' button (indicated by the **red** arrow) will undo previous actions and restore the original Part C (BTOTS) exit reason. As mentioned previously, this action will cause the child to appear on the ‘Reconcile TEDI Exit Reasons’ form as a ‘Non Match’ again.

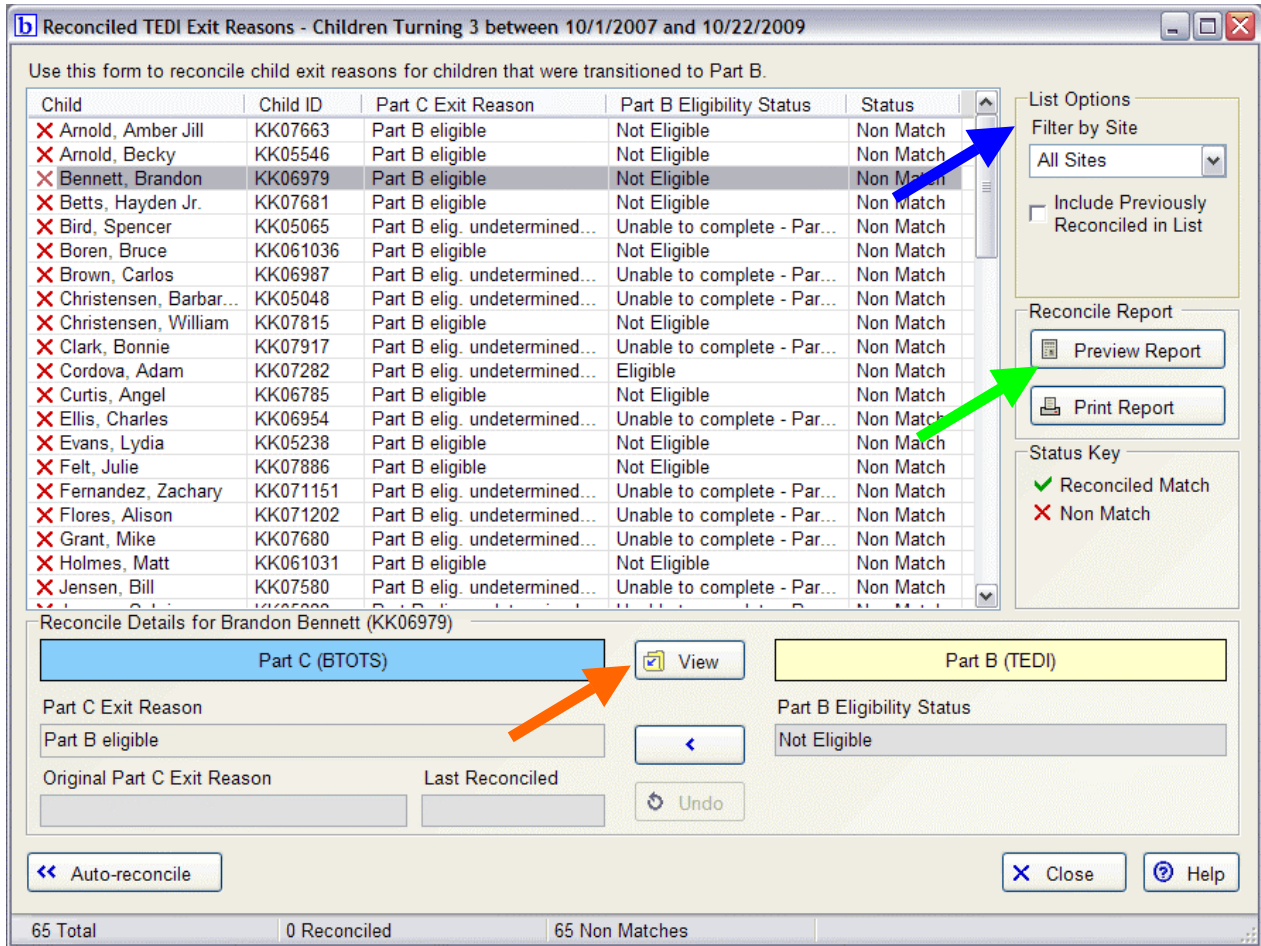
Match Status for Children at the End of the Reconciliation Process

At the end of the reconciliation process, children on the 'Reconcile TEDI Exit Reasons' form who had a beginning status of 'Non Match' should show the 'Reconciled Match' status.

Additional Options

The list of children can be filtered by site. This filter option is located in the upper right hand side of the screen (indicated by **blue** arrow).

1. A report can be printed out that lists all children in the Summary section of this form. The button is located in the middle right hand side of the screen (indicated by **green** arrow).
2. To view a particular Child Folder, highlight the child in the Summary list, and then click on the 'View' button, located in the 'Reconciled Details' section of the form (indicated by **orange** arrow).



2. Service Setting/Service Intensity

Selecting the appropriate Service Setting entry is now dependent on the Service Intensity. They will be mapped as follows:

Service Intensity	Service Setting
Individual	<ul style="list-style-type: none"> • Home • Community • Other
Group	<ul style="list-style-type: none"> • Community • Dev delay program (PDD) • Dev delay program (PDD) - Integrated • Typical developing program (PTD)

BTOTS 2.8.1 Updates—February 2010

3. If a child does not qualify for EI services, all assessments are required to be entered before moving the child to tracking.
4. Adding an employment end date will prompt user to deactivate user account for that employee (if applicable).
5. Bug Fixes
 - a. Fixed error running Summary Tab Report.
 - b. '6 Month IFSP Review' reminder link will again appear under Child Actions one month prior to due date.
 - c. Empty child classes can be deleted.
 - d. Child IDs created at new referral will increment correctly (ids were skipping every other number).