


BTOTS Web Alpha Review Checklist


Part 2 – December 2011

Accessing the Alpha Test Site

- 1. Enter the URL in your Browser:** <https://btots.health.utah.gov>
- 2. Continue through your browser's security warning:** The alpha site is using a temporary SSL certificate meaning that your browser will complain that the site is "untrusted" or invalid. A valid certificate will be purchased once the site is released, but you will need to accept the untrusted certificate to view the alpha site.
Firefox: Click the "I Understand the Risks" link and then the "Add Exception" button. In the dialog click the "Confirm Security Exception" button to allow you to go to the site.
Google Chrome: Click the "Proceed anyway" button to continue on to the website.
Internet Explorer (IE): Click the "Continue to this website (not recommended)" link.
- 3. Login as one of the users:** You are not required to enter a username password on the alpha test site. Simply click one of the EI Program Demo Login links (e.g., Program Administrator or Data Entry) to access the system.

Alpha Review Checklist

The following activities will provide you with a guide as to what features are nearing completion and are ready for initial review and feedback on the alpha site. Remember the "Support" Link  in the dark blue bar at the top of each page can be used to provide feedback regarding a particular feature. Thank you for your help.

- Enter Child Visits → Open a child folder for a child that is under IFSP and go to the "Visits" tab.
 - ⇒ Use the "Add Visit/Contact" link to create a new visit for one of the services.
 - ⇒ Add a visit on the same day as an existing visit for the child. Notice the "Previously Recorded Visits" section at the bottom displays any visits entered on the same day as the child.
 - ⇒ Edit an existing visit by clicking the "Edit" link in the visit list.
 - ⇒ Remove a visit using the "Remove" link.
 - ⇒ Use the visit list filters to show a single type of visits
- Enter a new Child Referral → Click the "New Referral" link  on the quick link bar near the top or you can use the "New Child Referral" under the child menu.
 - ⇒ Click the "Continue with New Child Referral" button on the initial pop-up message asking if you want to complete a child lead or child transfer.
 - ⇒ Step 1: Enter name, gender, and birth date and click "Next".
 - ⇒ Step 2: Select "new referral and does not match" option and click "Next". If you get the "Create New Referral" pop-up, continue with a new referral.
 - ⇒ Step 3 - 7: Complete all required fields on the various steps and click "Finish" on step 7 to create the new child referral.
- Exit a Child Under IFSP → Go through the exit process for a child under IFSP
 - ⇒ Open a child folder for a child that is currently under IFSP and start the "Exit Wizard" by clicking on "Exit Child" link under "Child Actions" on the rights side Child Folder Summary tab.

- ⇒ Steps 1 – 7: Complete the exit steps and click “Finish” to complete the exit.
- Fix IFSP Service Data Entry Errors → Go to a child folder that is Under IFSP and select the IFSP sub-tab you wish to fix.
 - ⇒ Click the “Edit” link on the services tab to fix a data entry error that was made.
 - ⇒ On the last IFSP add a service that was missing during data entry by clicking the “Add IFSP Service” link on the services tab.
- Amend a Child’s Services → Go to the last IFSP for a child under IFSP and click the “Add IFSP Amendment” link on the services tab.
 - ⇒ Enter a change date and a new frequency for one of the services. Click Save.
 - ⇒ Edit the newly created amendment by clicking the “Edit” link in the IFSP Amendment section on the services tab.
 - ⇒ Add a new service by clicking the “Add New Service” tab, clicking “Add Service” button and providing the necessary details.
- Explore the other IFSP sub-tabs → Go to an IFSP tab on the child folder to explore the different sub-tabs.
 - ⇒ Non-EI Services: Add and remove a non-EI Provider
 - ⇒ Levels of Functioning: Add or update levels of functioning for the child.
 - ⇒ Outcomes: Add an IFSP Outcome. Edit the outcome to specify a new rating for an outcome.
 - ⇒ Family CPR: Update Family CPR information
 - ⇒ Notes: Add/edit notes on the child’s IFSP
- Child Classes → Click on the “Child Class List” on the quick link bar (dark bar) to view available child classes (alternatively it is available under the “Provider” tab as “Child Class List”).
 - ⇒ Click on the “Edit” Link for a specific class to view the class details.
 - ⇒ Click on the “Attendance” tab to see the individual classes held.
 - ⇒ Click “Edit” for a specific class date to view the attendance.
 - ⇒ Update who was attending by clicking the checkboxes next to the child’s name.
 - ⇒ Update the child specific note by clicking the “Edit Notes” link for a child.
 - ⇒ Add an alternate attendance child (e.g., a child scheduled for Tues/Thur class that showed up for Mon/Wed class) by typing a name (try single letters to find a child “a b”, “a j”, “t e”, etc. – it only shows children that are also signed up for a class during that time period) and clicking “Add” button.