



Program Participation System (PPS) User Guide



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Preface

The purpose of the Program Participation System (PPS) User Guide is to provide county Birth to 3 Programs with a resource containing operational instruction on how to record program referral, evaluation, enrollment, and transition data into PPS. The intent of the guide is to ensure that each county program is entering data in the same way. This assures that the Annual Performance Report (APR) is accurate upon submission to the federal government.

Chapter 1: Background

The Program Participation System (PPS) records Wisconsin's Birth to 3 Program referral, enrollment, transition, and outcome data.

Reporting for the Wisconsin Birth to 3 Program is required by Wis. Admin. Code §§ DHS [90.05\(3\)\(a\)](#) and [90.06\(2\)\(o\)](#). Data from PPS is used to meet the annual October 1 Child Count reporting requirements of the U.S. Department of Education, Office of Special Education and Rehabilitative Services, as authorized under 20 U.S.C. §§ 1476(b)(14) and 1418(b)(1) and (5).

Data retrieved from the Birth to 3 Program PPS module is used to prepare the Annual Performance Report (APR) submitted to the Office of Special Education (OSEP), the governor, and each house of the Wisconsin state legislature.

Chapter 2: Accessing PPS

This section outlines the steps required to gain access to the Birth to 3 Program module in PPS.

To access PPS, you must:

1. Have Microsoft Internet Explorer 6.0 or higher installed as your internet browser.
2. Obtain your WAMS ID and password from <https://on.wisconsin.gov/WAMS/SelfRegController>.
3. Provide your WAMS ID along with a completed [User Agreement for System Access form, F-00044](#), to your county Birth to 3 Program PPS security officer, who grants access to PPS.

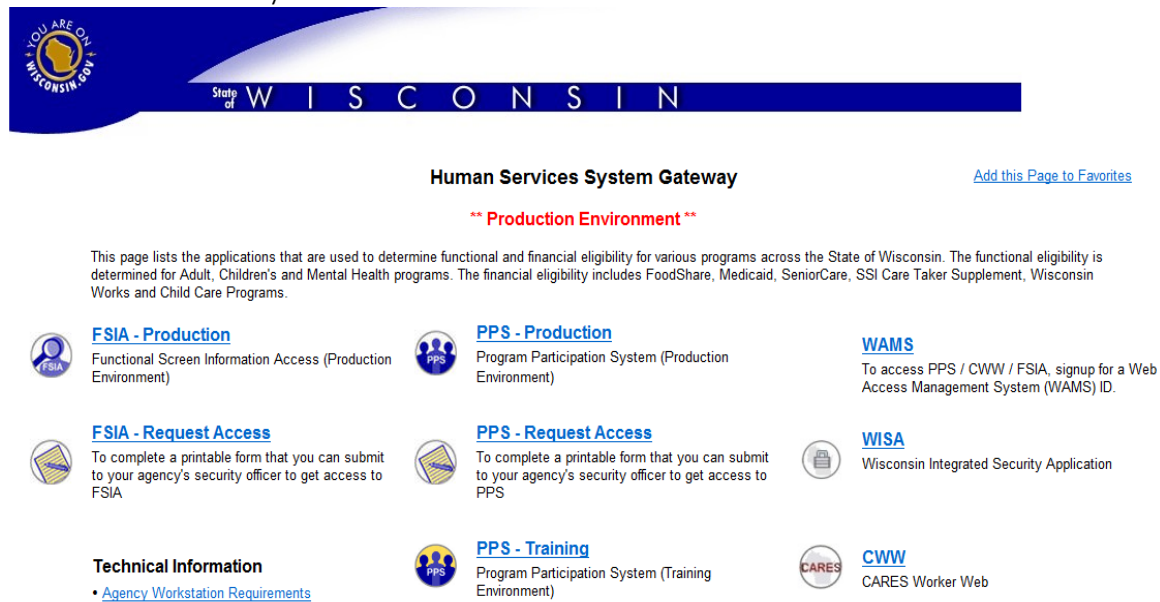
If you are unsure who your county Birth to 3 Program PPS security officer is, contact the Technical Assistance Center (TAC) inbox at DHSBCSTAC@dhs.wisconsin.gov or 608-267-6767 to resolve the issue.

If you are having any PPS system issues, you can call the DHS SOS Desk 608-266-9198 or email dhssoshelp@wisconsin.gov.

Chapter 3: Using PPS

This section provides information on how to log into and navigate PPS.







1. Go to the Wisconsin Services Gateway Page at <http://pps.wisconsin.gov/>.
2. From this page, select **PPS – Production**. This is where child and family information is recorded in the system.



Human Services System Gateway [Add this Page to Favorites](#)

**** Production Environment ****

This page lists the applications that are used to determine functional and financial eligibility for various programs across the State of Wisconsin. The functional eligibility is determined for Adult, Children's and Mental Health programs. The financial eligibility includes FoodShare, Medicaid, SeniorCare, SSI Care Taker Supplement, Wisconsin Works and Child Care Programs.

 FSIA - Production Functional Screen Information Access (Production Environment)	 PPS - Production Program Participation System (Production Environment)	 WAMS To access PPS / CWW / FSIA, sign up for a Web Access Management System (WAMS) ID.
 FSIA - Request Access To complete a printable form that you can submit to your agency's security officer to get access to FSIA	 PPS - Request Access To complete a printable form that you can submit to your agency's security officer to get access to PPS	 WISA Wisconsin Integrated Security Application
Technical Information • Agency Workstation Requirements	 PPS - Training Program Participation System (Training Environment)	 CWW CARES Worker Web

3. The PPS Login page will appear. Enter your WAMS ID (in the User ID field) and password.
4. Click **Login**.

The Birth to 3 Program PPS homepage appears.



User ID:
Password:

Login

[Forgot your password? Is your account locked?](#)
[Request a Wisconsin User ID and Password.](#)

You are about to access a State of Wisconsin computer system. This is a restricted computer system for authorized users only. All equipment, systems, services, and software connected to this system are intended only for official business use of the State of Wisconsin, and may contain U.S. Government information. All data contained on this system is owned by the State of Wisconsin. The State of Wisconsin reserves the right to audit, monitor, record and/or disclose all transactions and data sent over this system in a manner consistent with State and federal law. Use of this system by any user, authorized or unauthorized, constitutes consent to monitoring, recording, reading, copying, or capturing and disclosure of data and transactions by authorized personnel. Only software and/or hardware approved, scanned, and licensed for State of Wisconsin use is permitted on this system. Any illegal, unauthorized use or modification of the State of Wisconsin data, equipment, systems, services, or software by any person(s) is prohibited and may be subject to civil or criminal prosecution under state and/or federal laws.

[WAMS Home](#) [Wisconsin Portal Home](#)
Please don't bookmark this page.

Home Page

Name	Last Accessed	View/Edit
	12/18/2018	
	12/17/2018	

Two items are embedded in the left-hand side of the blue header bar:

- The environment of PPS being accessed (that is, Production or Testing).
- The current user's ID number and name.

The printer icon, the Help button, and the Logout button are located on the right-hand side of the blue header bar.

The Navigation Menu is located along the left-hand side of every page in PPS.

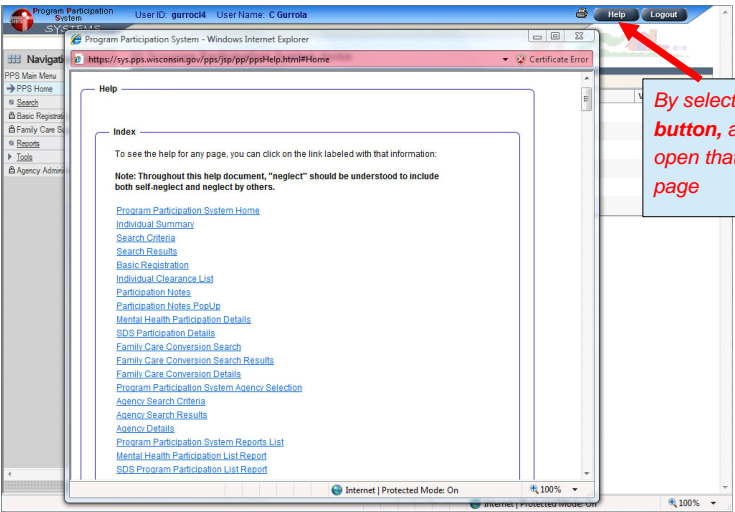
A list of recent searches will appear in the body of the PPS home page.

Help Page

Open the Help page at any time by clicking the **Help** button located in the upper right-hand corner of the blue header bar.

A detailed list of topics related to the screen that is currently open will appear.

Click the brief description that best describes what you need help with.



❖ PPS' Help Page is context sensitive. It will open up to the place where there information about the page you currently are on in PPS

Wisconsin DHS/DPI

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Chapter 4: The Search Function

Program Participation System User ID: Jessebvail User Name: J Vail Help Logout

PRODUCTION

Navigation Menu

- PPS Main Menu
 - PPS Home
 - Search
 - Inbox
- Individuals
 - Basic Registration
 - Individual Information
- Work Management
 - Financial Reporting
 - LEA Notification
 - Referral Management
 - Workload Management
 - Wait List Management
- Reports
 - Reports List
- System Administration
 - Agency Administration

Search Criteria

*** AUTHORIZED USERS ONLY ***

The Program Participation System allows for three types of searches: 1) by Demographic Information, or 2) by MCI ID or 3) by Social Security Number.

Demographics Information (Full or partial First Name, full or partial Last Name and Birth Date are required)

First Name: ☒ Starts With ☐ Exact

Last Name: ☒ Starts With ☐ Exact

Birth Date: / /

OR

MCI

MCI ID:

OR

Identification Number

SSN: - -

The PPS Search Criteria page is used to find a particular child. Before entering a child into PPS, a search **must** be completed to confirm that a new child is not a Birth to 3 Program participant in the system.

Searching for a Child

1. Select **Search** from the Navigation Menu on the left-hand side of the screen.
2. Enter the child's first and last initials and date of birth. Do not search by Social Security number.
PPS will allow the user to enter impossible values. Therefore, it is critical to carefully enter and verify search criteria.
3. Select **Go**.
4. Results associated with the search criteria will appear.

Search Results

1. To view additional details about the child(ren) listed in the search results, click on the magnifying glass on the right-hand side of the screen in the Details column. If no possible matches appear, verify that the search criteria (the child's initials and date of birth) were correctly entered.
2. After identifying the child in your program click the magnifying glass to open the individual summary page. If the child is currently served by another county Birth to 3 Program, the **Add** button will be grayed out or disabled. Contact the TAC inbox at DHSBCSTAC@dhs.wisconsin.gov or 608-267-6767 if you encounter this issue.

3. If you discover a child has been mistakenly entered more than once, contact the TAC inbox at DHSBCSTAC@dhs.wisconsin.gov or 608-267-6767 to resolve the issue.

Chapter 5: Basic Registration

The screenshot shows the 'Basic Registration' page in the 'Program Participation System'. The user is logged in as 'Jessebvail' with 'User Name: J Vail'. The page has a navigation menu on the left with options like 'PPS Main Menu', 'Search', 'Inbox', 'Basic Registration', 'Individual Information', 'Work Management', 'Financial Reporting', 'LEA Notification', 'Referral Management', 'Workload Management', 'Wait List Management', 'Reports', 'Reports List', 'System Administration', and 'Agency Administration'. The main area is titled 'Basic Registration' and contains a form for entering child information. The form has fields for Title, First Name, Middle Name, Last Name, Suffix, Gender, Birth Date, and SSN. A 'Next' button is at the bottom right.

This section describes how to enter a new program participant.

Basic Registration Page

The primary purpose of the Basic Registration page is to add a new record into PPS for a child who is not in the PPS system. The Basic Registration screen is only used to add a new record **after** confirming there are no search matches for the child.

- A. Click on the **Basic Information** tab in the left navigation menu.
- B. Enter the required child demographic information into the correct fields.
- C. Select the **Next** button.


If there are any records in the system with similar information entered, results will appear. A percentage of 84 or higher indicates a match for the child and a record already exists. To choose a record, click on the radio button to the left of the child's information and click **Next**.

If no match is found, create a new individual in the PPS system:

1. Click on the radio button to the left of "Create new individual."
4. Click **Next**.
5. Click on the radio button to the left of the child's name.
6. Click **Next**.

The individual summary page for the child appears.

Chapter 6: Inbox


Reset

Referral Search Criteria

* Agency:

* Item Type:

* Status:

Referral Received From Date: To Date: Go

Search Results

1
of 2 Pages

First Name	Middle Name	Last Name	Gender	Birth Date	County Of Responsibility	Item Date	Referral Method	Status	Select to Process
MAHESH		GANESH	Male	09/09/2018	05 Brown	07/09/2019	WE-TRAC	Not Processed	<input type="radio"/>
MATTEW		JOHN	Male	09/09/2018	05 Brown	07/09/2019	CAPTA	Not Processed	<input type="radio"/>
RITY		NEVER	Male	01/01/2017	05 Brown	06/20/2019	CAPTA	Not Processed	<input type="radio"/>
RITYS		NEVER3	Male	01/01/2017	05 Brown	05/21/2019	Child Welfare	Not Processed	<input type="radio"/>

Next

The purpose of the inbox is to receive nightly referrals for the Birth to 3 Program. Sources with the capability to send automated referrals include 1) audiologists who have diagnosed a child with hearing loss (resulting in a WE-TRAC referral), 2) the Department of Children and Families (DCF) a) when there is a substantiated case of abuse and neglect (resulting in a CAPTA referral); or b) when a Child Welfare staff member identifies a child as having a potential delay or disability (resulting in Child Welfare referral).

The CAPTA and Child Welfare electronic referral from eWiSACWIS will be sent to the Birth to 3 Program in the county in which the child welfare agency case originated. A substantiated case of child abuse and/or neglect will result in a CAPTA referral. Any other circumstance in which a child is identified by Child Welfare staff as having a potential delay or disability will result in a Child Welfare referral.

Referrals, sent nightly to the Birth to 3 Program, will appear in the inbox. An email alert will be sent to the Birth to 3 Program from DHSDLTCBto3group@wisconsin.gov to let a Birth to 3 Program know a referral has been sent to the PPS inbox. These referrals need to be processed.

The original date the referral was sent in the Item Date column marks the start of the 45-day timeline. Therefore, it is important to check the inbox regularly to assure referrals are processed and acted upon in a timely manner. If a referral is red, that means the referral is over 14 days old.

To process referrals:

1. Click **Inbox** in the left navigation bar.
7. Select the "Required Information" (select 'agency' only).
8. Click **Go**.

A list of referrals that need to be processed appears (if you chose status of "not processed").

The column titled "Referral Method," indicates the referral source.

9. Click the button in the column titled "Select to Process" to select the case you want to process.
10. Click "Next."

Chapter 7: Individual Summary Page

Navigation Menu

- PPS Main Menu
 - PPS Home
 - Search
 - Inbox
- Individuals
 - Basic Registration
 - Individual Information
 - Individual Summary
 - Birth to 3 Reporting
 - Correspondence
 - Service Reporting
- Work Management
 - Financial Reporting
 - LEA Notification
 - Referral Management
 - Workload Management
 - Wait List Management
- Reports
 - Reports List
- System Administration
 - Agency Administration

Individual Summary

Cancel ☐ Reset

Basic Information

Title:

*First Name: Middle Name: *Last Name:

Suffix:

*Gender:

*Birth Date:

SSN: SSN Verification: Last Updated Date:

This individual is currently on Medicaid: ☐ Last Updated By:

Save

Mental Health Program Participation Information

Responsible Agency	Program	Start Date	End Date	Disenrollment Reason	View/Edit	State Decision
There are no enrollments in your agency at this time						

Birth to Three Program

County	Service Provider	Birth to 3 Status	Initial IFSP Date	Closing Date	Disenrollment Reason
01 Adams	Adams Birthto3	Receiving Services			

Which screen would you like to view/edit?

☒ Child & Referral Info ☐ Screening/Evaluation ☐ Service Planning ☐ Transition/Program Exit ☐ LEA Information

Go

Previous

The Individual Summary page is the place to add or update basic information on a child in the Birth to 3 Program. The following screens are available for children entered into PPS. To begin adding information on a child:

- Click **Add** on the Individual Summary page. This opens the child and referral information page.

Navigating to Other Pages

From the Individual Summary page, navigate among the pages by selecting the radio button at the bottom of the screen that corresponds to the desired page and clicking **Go**.

The other pages in PPS used for the Birth to 3 Program are:

- Screening/Evaluation
- Service Planning
- Transition/Program Exit
- LEA Information (Not Available to Birth to 3 Programs)

Chapter 8: Child and Referral Information Page

Navigation Menu

PPS Main Menu

PPS Home

Search

Inbox

Individuals

Basic Registration

Individual Information

Individual Summary

Birth to 3 Reporting

Child Referral Info

Screening and Evaluation

Service Planning

Transition and Exit

LEA Information

Correspondence

Service Reporting

Work Management

Financial Reporting

LEA Notification

Referral Management

Workload Management

Wait List Management

Reports

Reports List

System Administration

Agency Administration

Child and Referral to Birth to 3 Information

CancelReset

Child Information

Child's Caregivers

Legal Guardian

Relationship:

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Language Preference:

Interpreter Needed:

Phone: X

E-mail:

Other Caregiver

Relationship:

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Language Preference:

Interpreter Needed:

Phone: X

E-mail:

Residential Address

Legal Guardian

Family is homeless

* Address:

* City:

* State:

* Zip: -

Other Caregiver

Residential address is different than legal guardian's residential address

Address:

City:

State:

Zip: -

Mailing Address

Legal Guardian

Mailing address is different than residential address

Address:

City:

State:

Zip: -

Other Caregiver

Mailing address is different than residential address

Address:

City:

State:

Zip: -

Child's Race

* American Indian / Alaskan Native:

* Hawaiian / Other Pacific Islander:

* Black / African American:

* Asian:

* White:

Populate unknown responses as No

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- The county Birth to 3 Program
- The demographics of the child and his or her family
- Referral information
- The child's Birth to 3 Program status

- Enter information about the child's parent or legal guardian in the left-hand column (address includes city, state, and zip).
- If a family is homeless, it is possible to **both** check the "Family is homeless" box in the Residential Address section **and** include a mailing address, if one is available.

- The parents or guardian determine the race and ethnicity of the child. Choose all that apply. Select “No” for those that do not apply. Always complete the ethnicity box, too.

- **Asian:** All persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent. This includes, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- **Black or African American:** All persons having origins in any of the black racial groups of Africa.
- **White:** All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.
- **Native Hawaiian or Pacific Islander:** All persons having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. (The term Native Hawaiian does not include individuals who are native to the state of Hawaii by virtue of being born there.)
- **American Indian or Alaska Native:** All persons having origins in any of the original people of North, South, and Central America.

Ethnicity

Hispanic: Always complete this box. Choose “Yes” if the child is of Mexican, Puerto Rican, Cuban, Central or South American, or another Spanish culture or origin.

Referral Information Section

Enter the date of referral into the initial contact date field. The system will not cross-check to see if the date is possible and would allow an impossible value, such as a referral date that precedes the child’s birthdate.

Referral Type Section

The person or Agency that is responsible for making the initial contact to the primary point of referral or County Birth to 3 Program.

From the available choices, select the option that is the most applicable. Be as specific as possible.

- **Audiologist**—includes health care professionals trained to evaluate hearing loss and related disorders, including referrals received from WE-TRAC (Wisconsin EHDI—Tracking Referral and Coordination).
- **CAPTA**—child has been referred through eWiSACWIS under the requirements of Child Abuse Prevention and Treatment Act (CAPTA) due to a substantiated case of abuse or neglect.
- **Child care provider**—includes agency or family child care providers.
- **County social services agency**—includes child protective services if abuse or neglect of child has not been substantiated, including child welfare referrals received from eWiSACWIS. **NOTE:** Use “CAPTA” referral only if the referral is for a child with substantiated abuse or neglect.

- **CYSHCN Regional Center**—refers to the staff from the five Children and Youth with Special Health Care Needs regional centers in Wisconsin or through Wisconsin WayFinder.
- **Head Start provider**—includes Early Head Start and Head Start providers.
- **Hospital or specialty clinic**—includes physicians or other staff in hospitals, neonatal intensive care units (NICU), or specialty care clinics.
- **Parent or relative**—refers to the parent(s) and/or guardian(s) or other relatives of the child.
- **Physician**—refers to the child’s primary care physician.
- **Public health agency**—includes public health department nurses; Women, Infants and Children (WIC) clinic personnel; and home visitors employed by public health departments.
- **School district**—refers to the local education agency (LEA).
- **Tribal Health Center or Tribal CSHCN**—includes tribal health care providers or the tribal Children and Youth with Special Health Care Needs Center through the Great Lakes Inter Tribal Council (GLITC).
- **Tribal School or Tribal Head Start Program**—includes staff from a tribal school or tribal Head Start providers.
- **Other county staff**—includes staff from a human service department or department of community programs. Use “County social services agency” if the referral is from a child welfare agency.
- **Other health care provider**—includes health care providers not listed above.
- **Other**—refers to non-health care providers.

Responsibilities

Select your county and service provider as the Birth to 3 Program that is serving the child.

Child Status Regarding Birth to 3 Program Section

1. Complete this section when a family requests [Child Enrollment Status Regarding Birth to 3 Program, F-00316](#).
12. Enter the date the form was completed.
13. Select the applicable therapy service.
14. Select the number reason documented on the form.
15. Click **Add**.

Enter the above information for each therapy separately.

Chapter 9: Screening/Evaluation

Page

The screenshot displays a software interface for 'Screening / Evaluation'. It is divided into two main sections: 'Screenings' and 'Evaluations'. Each section has input fields for dates, checkboxes, and dropdown menus, followed by a table of records and 'Reset' and 'Add' buttons.

Screenings Section:

- Expected Screening Date: MM/DD/YYYY
- Actual Screening Date: MM/DD/YYYY
- Recommend Evaluation?: ☐ (dropdown)
- Rescreen?: ☐ (dropdown)
- Delete: ☐

Expected Screening Date	Actual Screening Date	Recommend Evaluation?	Rescreen?	Deleted
01/01/2024	01/01/2024	YES		

Evaluations Section:

- Initial Contact Date: 01/01/2024
- Actual Evaluation Date: MM/DD/YYYY
- Initial IFSP Due Date: MM/DD/YYYY
- Type: (dropdown)
- Eligible for Birth to 3: ☐ (dropdown)
- Delete: ☐

Initial Contact Date	Initial IFSP Due Date	Actual Evaluation Date	Type	Eligible for Birth to 3	Deleted
01/01/2024	02/15/2024	01/03/2024	COMMUNICATION SERVICES	YES	
01/01/2024	02/15/2024	01/03/2024	SPECIAL INSTRUCTION	YES	

The purpose of the Screening/Evaluation page is to document the following:

- Screenings
- Evaluations
- Eligibility for B-3 Program
- Child characteristics

Screenings Section

This section is used to document screenings performed by the Birth to 3 Program.

1. Enter the actual date the screening occurred in the Actual Screening Date field.
16. Be sure to enter the correct screening date. The system will not cross-check to see if the date is possible and would allow an impossible value, such as a screening date that precedes the child's birthdate.
17. Select either "Yes" or "No" in the fields Recommend Evaluation and Rescreen. If an evaluation is recommended, choose "Yes."
18. If no evaluation was recommended, answer whether another screening is recommended.
19. Click **Add**, located on the far right-hand side of the screening section.

Evaluations Section

Enter information about any evaluations conducted to determine the child's eligibility for the Birth to 3 Program. For each evaluation:

1. Enter the actual date the evaluation took place. Be sure to enter the correct evaluation date. The system will not cross-check to see if the date is possible and would allow an impossible value, such as an evaluation date that precedes the child's birthdate.
20. Select the discipline that conducted the evaluation in the Type field.
21. If the team found the child to be eligible for the Birth to 3 Program, select "Yes" in the Eligible for Birth to 3 field. If the team did not find the child eligible, select "No."
22. Click **Add**.
23. Repeat steps to enter another evaluation.

Eligibility Section

The screenshot shows two form sections. The top section, titled "Eligibility", contains four fields: "Why Eligible?" (a dropdown menu), "Area Of Delay" (a dropdown menu), "Diagnosed Condition:" (a dropdown menu), and a large text area labeled "Explain the atypical development affecting overall development:". Below the text area, it says "Current Size = 0 characters (500 characters max)". The bottom section, titled "Client Characteristics", contains three dropdown menus labeled "Characteristic 1", "Characteristic 2", and "Characteristic 3". A "Return" button with a magnifying glass icon is located at the bottom right of the form.

This section documents the child's primary Birth to 3 Program eligibility reason.

In the Why Eligible? field, select and complete the following:

- For a 25% or greater delay, choose 25% delay and in the "Area of Delay" field, choose the area of delay in which the child was determined eligible for the Birth to 3 Program.
Areas of delay are limited to the five domain areas: cognitive development, physical development which includes vision and hearing, communication development, social and emotional development, and adaptive development which includes self-help skills.
- For a diagnosed condition, when the diagnosis is supported by a physician's report documenting the condition, choose diagnosed condition and choose the diagnosis that indicates the reason for eligibility in the corresponding field. For descriptions of the various "conditions" listed below see the [Diagnosed](#)

[Conditions and Atypical Development Guidance for Wisconsin's Birth to 3 Program \(P-00893\)](#)

- Down syndrome
- Autism spectrum disorder
- Blind/visually impaired
- Cerebral palsy
- Deaf/hearing impaired
- Fetal alcohol syndrome
- Shaken baby syndrome
- Significant prematurity
- Genetic condition
- Perinatal condition
- Neurological condition
- Sensory condition
- Physical condition
- Social emotional condition
- Medically complex
- Growth and feeding
- Technology dependent
- For atypical development, choose atypical development, in the Area of Delay field choose the area of delay and provide information to explain the [atypical development](#) affecting the child's overall development in the comment box.

Client Characteristics Section

Client characteristics identify the major factors impacting a child's ability to learn. Select the primary reason for the child's eligibility for the Birth to 3 Program in the "Characteristic 1" field.

Update this section as new information about the factors impacting the child's learning is identified through working with the child (e.g., new diagnosis, ongoing assessment). Up to three characteristics may be selected.

- Blind/visually impaired
- Communication delay
- Deaf/hard of hearing
- Deaf/blind
- Autism spectrum
- Brain trauma
- Cerebral palsy
- Epilepsy
- Intellectual or developmental disability
- Other or unknown
- Physical disability/mobility impaired
- Severe emotional disturbance
- Severe health impairments

Chapter 10: Service Planning

The screenshot displays the 'Service Planning' web application. On the left is a 'Navigation Menu' with categories: PPS Main Menu (PPS Home, Search, Inbox), Individuals (Basic Registration, Individual Information, Individual Summary, Birth to 3 Reporting, Child Referral Info, Screening and Evaluation, Service Planning, Transition and Exit, LEA Information, Correspondence, Service Reporting), Work Management (Financial Reporting, LEA Notification, Referral Management, Workload Management, Wait List Management), Reports (Reports List), and System Administration. The main content area is titled 'Service Planning' and includes a 'Cancel' button and a 'Reset' button. It is divided into three main sections: 1. 'Initial IFSP Date' with a date picker and a dropdown for 'Reason for Late IFSP'. 2. 'Entry Child Outcomes Information' containing an 'Assessment' section with three ranking dropdowns (Positive Socio-Emotional Skills, Acquiring and Using Knowledge and Skills, Taking Appropriate Actions to Meet Needs) and a 'Sources of Information' section showing selected values for Knowledge and Skills and Appropriate Actions. 3. 'Services' section with an 'Add' button and a table with columns: ISFP Date, Service Type, Provider, Location, Service Start, Service End, Deleted, and View/Edit.

The purpose of the Service Planning page is to document the development and implementation of an individualized family service plan (IFSP). The Child and Referral Information and Screening/Evaluation pages must be completed prior to entering data on the Service Planning page, which includes the following sections:

- Initial IFSP date
- Entry child outcome information
- Services
- Additional assessment

Initial IFSP Date Section

- Enter the date of the initial IFSP meeting when the child's parents or guardian gave consent for services on the initial IFSP, including an interim IFSP.
- If the IFSP is completed **after** 45 days from the referral, enter the reason for the late IFSP in the corresponding field.
 - Exceptional family reason: IFSP was late due to family circumstances (e.g., child or family member illness, vacation).
 - System reason: This action was late due to staff and/or agency.
 - Extreme weather: Weather resulted in travel advisories and/or unsafe conditions (such as school or road closures), delaying completion of the IFSP.

Entry Child Outcomes Information Section

PPS requires entry child outcome information to be completed and saved in order to move to the Services section.

Select the child's three entry outcome ratings, as determined by the team for:

- Positive socio-emotional skills
- Acquiring and using knowledge and skills
- Taking appropriate action to meet needs

Once you enter **Initial IFSP** information on the Service Planning page of PPS, you **must** also complete Entry Child Outcome information. PPS will **not** allow you to exit the Service Planning page until you complete Entry Child Outcome information. If you attempt to exit the Service Planning page without completing the Entry Child Outcome information fields, you will receive a red warning stating you must complete Child Outcome information before moving forward or exiting the Service Planning page. For each entry rating, select a value from 1-7. There will only be an "8" value when all three outcomes are not applicable.

Entry social-emotional	Entry skills and knowledge	Entry action to meet needs	Explanation of score
6	4	4	Allowable because all outcomes have a value of 1-7.
8	8	8	Allowable because all outcomes are 8 (not applicable).
4	8	5	Not allowable. There should not be values of 1-7 along with an 8.

Sources of Information

From the Sources of Information drop-down menu, select all sources used to determine the Child Outcomes ratings for each of the three child outcomes. Click the sources of information tab to expand the table for data entry. Click on each child outcome to choose the sources of information used:

- Parent Interview
- Observation
- Assessment, Evaluation and Programming System (AEPS)
- Battelle Developmental Inventory, Second Edition (BDI-2)
- Brigance Inventory of Early Development II
- Carolina Developmental Profile
- Creative Curriculum for Developmental Continuum

- Early Learning Accomplishment Profile (E- LAP)
- Hawaii Early learning Profile (HELP)
- High/Scope Child Observation Record (COR) for Infants and Toddlers
- High/Scope Preschool Child Observation Record (COR)
- The New Portage Guide Birth to Six
- The Work Sampling System, (preschool 3 and 4, 2004)
- The Ounce Scale
- Peabody Developmental Scales
- Preschool Language Scales
- REEL
- Rosetti Infant/Toddler Scales
- Mullen Scale of Early Learning
- Other, please specify

Once completed, click the **Sources of Information** tab again to collapse the table.

Services

*Primary Location:

Home

Does family have parental cost share?:

Service Delivery Approach:

Family Income:

Other:

Additional Assessment

Type:

Date:

MM / DD / YYYY

Delete:

Reset

+ Add

Type

Date

Deleted

Return

Services are documented in this section exactly as they appear on the child's IFSP.

Services available through the Birth to 3 Program and Qualified Personnel, when applicable. For descriptions of services see [Wis. Admin. Code ch. DHS 90.11\(4\)](#).

Assistive Technology (Assistive Tech.)

Audiology—provided by a registered or licensed audiologist

Communication services (Comm. Services)—services provided by a registered or licensed speech/language therapist

Family Education and Counseling (Family Edu and Couns.)

Health svcs (Services)—provided by a licensed physician

Medical svcs provided by a licensed physician

Nursing svcs—provided by a registered and licensed nurse

Nutrition svcs- provided by a nutritionist registered as a dietician

Occupational therapy (OT)— provided by a licensed occupational therapist

Physical Therapy (PT)— provided by a licensed physical therapist

Psychological Services (Psych. Svcs)—provided by a licensed psychologist, or licensed school psychologist

Social work—provided by a certified social worker

Special instruction (Special Instr.)— provided by a DPI licensed special educator

Transportation (Transp.)

Vision services—provided by an optometrist or ophthalmologist, or an educational professional including teacher of the blind/visually impaired (TBVI) and orientation and mobility specialist

Other—provided by qualified personnel that meet the requirements of [34 CFR 303.13\(a\)](#), this would include personnel/provider(s) that serve DHH children

Service coordination—provided by a service coordinator

Interpreter Services—provided by a licensed sign language interpreter or a competent foreign language interpreter

Adding a Service

The screenshot shows a web-based form titled "Service Planning". At the top right are "Cancel" and "Reset" buttons. Below the title bar is a "Service Details" section with a "+ Add" button. This section contains several input fields: "IFSP Date:" (MM/DD/YYYY), "Service Provider:" (dropdown), "Service Start Date:" (MM/DD/YYYY), "Reason for Late Start:" (dropdown), "Frequency of Service:" (dropdown), "Funding Source for Service:" (checkboxes for Private insurance, Medicaid, Part C Monies, Local Funding), "Delete:" (checkbox), "Service Type:" (dropdown), "Location:" (dropdown), "Service End Date:" (MM/DD/YYYY), and "Visits Per:" (dropdown). Below this is a "Service Provider Information" section with fields for "First Name:", "Last Name:", "Contracted as:" (dropdown), "Agency:" (dropdown), "Credentials:" (dropdown), "Degree:" (dropdown), and "Other:" (dropdown). At the bottom right is a "Return" button.

1. Click **Add** to open a box where new service information is entered.
24. The initial IFSP date is prefilled.
25. Select the service type. Service Coordination is often the first service listed on the IFSP, and the start date may precede the initial IFSP date. Service Coordination is the **only** service for which this is allowable.
26. Select service provider (county).
27. Select service location.

- **Home**—is the setting where the child resides and includes the home of the parent(s), the home of another family member, or the child’s foster care home.
- **Family child care**—is a setting designed to care for other people’s children in the caregiver’s home. This setting includes children with and without disabilities.
- **Child care center**—is a setting designed to care for multiple children in a group setting, typically by age. This setting includes children with and without disabilities.
- **Outpatient services**—is a setting, such as a center, clinic, or hospital, where the child comes for short periods of time to receive services. The services may be delivered individually or to a small group of children.
- **Early intervention center**—is a setting that refers to an organized program of at least one hour in duration provided on a regular basis. This is a setting designed for children with developmental delays or disabilities.
- **Hospital**—is a setting where the child resides due to illness and must be receiving services on an inpatient basis.
- **Residential**—is a setting where the child resides and receives early intervention services. This setting refers to a treatment facility that is not primarily medical in nature.
- **Not Natural Environment, Other**—is any setting that is not a natural environment.
- **Natural Environment, Other**—is a setting designed to serve the general public and includes children with and without disabilities (for example, library, Family Resource Center, or park).

28. Enter the start date when each service actually began. Be sure to enter the correct service start date. The system will not cross-check to see if the date is possible. For example, the system would allow a service start date that precedes the child’s birthdate.

29. Select the reason for a late service start, if applicable:

- **System Reason:** This action was late due to staff or agency.
- **Exceptional Family Reason:** Family was not available to start the service within the 30-day timeline (e.g., child or family member illness, vacation).
- **Extreme Weather:** Weather resulted in travel advisories and/or unsafe conditions (such as school or road closures), delaying service start.
- **Team Decision:** IFSP Team determined that a particular service would appropriately begin on a date beyond the 30-day timeline.

30. Click **Return** at the bottom of the box to add the service to the service planning page.

31. Repeat steps to add another service.

IFSP Update with No New Services

1. Enter the date the IFSP meeting occurred when no new services were added.

32. Select “No services added” in the Service Type field. No other fields are completed.

33. Click **Return** at the bottom of the screen.

Primary Location Field

Enter the location where the majority of the services occur for this child and family.

Additional Assessments Section

The purpose of this section is to document additional assessments completed after the initial IFSP.

1. Select the type of additional assessment completed.
34. Enter the date the additional assessment was completed. Be sure to enter the correct assessment date. The system will not cross-check to see if the date is possible. For example, the system would allow an assessment date that precedes the child's birthdate.
35. Click **Add**.

Chapter 11: Transition/Program Exit

Navigation Menu

- PPS Main Menu
 - PPS Home
 - Search
 - Inbox
- Individuals
 - Basic Registration
 - Individual Information
 - Individual Summary
 - Birth to 3 Reporting
 - Child Referral Info
 - Screening and Evaluation
 - Service Planning
 - Transition and Exit
 - LEA Information
 - Correspondence
 - Service Reporting
- Work Management
 - Financial Reporting
 - LEA Notification
 - Referral Management
 - Workload Management
 - Wait List Management
- Reports
 - Reports List
- System Administration
 - Agency Administration

Transition / Program Exit

LEA / Notification / Transition / Referral / Program Exit

LEA Information

Local Educational Agency: [dropdown]

LEA Notification Opt Out if Parent Objects

☐ Parent objects to notifying LEA about the child

Notification

☒ Populate with last Notification details

Last Sent Date: [text]

Last Notified LEA: [text]

Provider Email Address: [text]

LEA Email Address (comma separated): [text]

Service Coordinator Name: [text]

Phone: [text] x [text]

Transition Planning Conference (TPC)

Was a TPC Held? [dropdown]

Date LEA was invited to TPC: [MM/DD/YYYY]

TPC Date: [MM/DD/YYYY]

TPC Exception Reason: [dropdown]

Transition Meeting

Was a meeting held with agencies other than the LEA to discuss child's transition at age three? [dropdown]

Which agency attended? [dropdown] Other Text: [text]

The purpose of the Transition/Program Exit page is to document the following:

- Local Education Agency (LEA) Information
- LEA Notification Opt Out if parent objects
- LEA notification
- Transition Planning Conference
- Referral to the LEA
- Program Exit
- Exit child outcomes
- Sources of information

Different fields will be available or grayed out, depending on whether or not the child is being referred to the local education agency.

LEA Information Section

Select the LEA where the child lives by the district name, not the elementary school name.

LEA Notification Opt Out if Parent Objects Section

When a family signs [Opting Out of Local Education Agency \(LEA\) and State Education Agency \(SEA\) Notification form, F-00169](#), check the box.

Notification Section

This section is used to send notification to a school district that an individual child enrolled in the Birth to 3 Program is close to turning 3.

1. Enter the Birth to 3 Program Provider email address (typically the service coordinator).
36. Enter the Birth to 3 Program service coordinator's name and phone number.
37. Click **Send Notification**.

See Chapter 12: The LEA Notification Tool for details on sending an LEA Notification for multiple children at one time.

NOTE: To delete an LEA Notification sent in error, contact the TAC inbox at DHSBCSTAC@dhs.wisconsin.gov or 608-267-6767 to resolve the issue.

Transition Planning Conference (TPC) Section

1. Complete the "Was a TPC held?" field Select "Yes" or "No" to indicate if the TPC occurred.
38. Enter the date the LEA was invited to the TPC if applicable.
 - If the response to "was a TPC held?" is "Yes," enter the date the TPC was held.
 - If the response to "was a TPC held?" is "No," or the TPC was late select a TPC exception reason. The choices available in the drop down are determined by the age of the child and whether a TPC was held.
 - Choices may include:
 - Family did not consent to a TPC. Use this reason after the child was determined potentially eligible for LEA services and if the Birth to 3 Program had discussions with the family but the family does not want a TPC.
 - Family did not provide timely consent for a TPC. Use this reason when the team spoke to the family about a TPC for the child determined potentially eligible for LEA services and the family did not give approval for a TPC until the child was within 90 days of turning three.
 - Child was referred to Birth to 3 after 2 years, 9 months of age. This reason is only used when the child's initial contact date (referral date) is within 90 days of the child turning three.
 - Birth to 3 invited the LEA but they did not attend.
 - Family was not available for the scheduled TPC, e.g., due to child or family illness, or family missed a scheduled meeting.
 - Birth to 3 Program did not start the transition process in a timely manner. Use this reason when the program did not communicate with the family about transition activities in a timely manner.
 - Birth to 3 was unable to schedule the TPC with LEA prior to the 90-day deadline.

- ## Refer to LEA Section

To refer a child who is potentially eligible for LEA services:

1. Select "Yes" in the field "Child potentially eligible for services through LEA?"

39. Select "Yes" or "No" regarding whether the family consented to share information with the LEA. If the response is "Yes," enter the date the family consented to share additional information with the LEA.
40. Select "electronic" in the "Referral Type" Field.
41. Enter today's date in the "Referral Sent Date" field.
42. If the referral is being sent within 90 days of child turning 3, select a reason in the "Referral Exception Reason" field.
43. Enter the email address of the Birth to 3 Program representative sending the referral.
44. Enter the Birth to 3 Program service coordinator's name and phone number.
45. If the family reversed their decision on form F-00169 within 90 days of the child turning 3, check the box **"Parents reversed opt out decision after 2 years 9 months."**
46. Check the box "Child was referred to Birth to 3 after age 2 years 9 months" when appropriate.
47. If consent to share additional information was marked "Yes":
 - a. Check the child's areas of need.
 - b. Add other information that may be helpful to the LEA in the comments box.
48. Click **Send/Save Referral** on the bottom right of this page to send to LEA referral. If prompted with a yellow message re-click send/save referral.
49. Go to the Child and Referral Information page of PPS and update the child's parent/address information, as necessary.

NOTE: To delete a referral sent to the LEA in error, contact the BCS TAC inbox at DHSBCSTAC@dhs.wisconsin.gov or 608-267-6767 to resolve the issue.

Program Exit Section

Program Exit	
Transition Plan: Exiting Birth to 3 Program	
<input type="checkbox"/> Child is leaving the Birth to 3 Program prior to 04/12/2019	
Were Transition Steps Recorded on IFSP?	<input type="checkbox"/> <input type="checkbox"/>
Date Transition Steps Recorded:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Transition Steps Exception Reason:	<input type="text"/>
Closing Details	
Closing Date:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Closing Reason:	<input type="text"/>
<input type="checkbox"/> Child referred to LEA, moved prior to age 3, and transferred to a Wisconsin Bto3 program	
Date next Bto3 Program contacted:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Child Outcome Information	
Exit Child Outcomes	
Positive Socio-Emotional Skills Ranking:	<input type="text"/> <input type="checkbox"/> Has the child shown any new skills or behaviors related to Positive Socio-Emotional Skills since the previous rating? <input type="checkbox"/>
Acquiring and Using Knowledge and Skills Ranking:	<input type="text"/> <input type="checkbox"/> Has the child shown any new skills or behaviors related to Acquiring and Using Knowledge and Skills since the previous rating? <input type="checkbox"/>
Taking Appropriate Actions to Meet Needs Ranking:	<input type="text"/> <input type="checkbox"/> Has the child shown any new skills or behaviors related to Taking Appropriate Actions to Meet Needs since the previous rating? <input type="checkbox"/>
Sources of Information Maximum Selections Allowed: 15	
Click above to make selections.	

Program exit

If the child exits the Birth to 3 Program prior to the date in the statement at the top of this section, check the box prior to the statement. Select “Yes” or “No” for the field “Were transition steps recorded on IFSP?”

- If yes, enter the date the transition steps were added to the IFSP at an IFSP meeting.
- If late or no, enter the exception reason.

Closing Details

To close a child in PPS:

1. Go to the Service Planning page.
50. For each service, enter the service end date.
51. Make sure to enter the correct date for service end date. The system will not cross check to see if the value is possible. Example: the system allows one to enter an end date that precedes the child’s birthdate.
52. Click the edit/pencil icon for the service.

53. Add the service end date for the open service.
54. Click **Return**.
55. Repeat for each open service.
56. Click return at the bottom of the of the service planning page.
57. Go to the Transition/Program Exit page
58. In the Program Exit section under Closing Details, enter the closing date. The closing date should be no later than the day prior to the child's third birthday.
59. Select a closing reason. Closing reason choices available in the drop down are determined by whether the child had an initial IFSP date entered into PPS.
 - a. **Child turned 3, referred to LEA, LEA found child eligible for special education.** This exception reason is used for a child served in the Birth to 3 Program who reached maximum age and was determined to be **eligible** by an Individual Education Plan team for early childhood special education services or related services.
 - b. **Child turned 3, referred to LEA but ineligible, referred to other programs.** This reason is used for a child served in the Birth to 3 Program who reached maximum age and was determined by an IEP team not to be eligible for early childhood special education services. The Birth to 3 Program staff discussed and explored other options at age 3 with the parents.
 - c. **Child turned 3, referred to LEA but ineligible, not referred to other programs.** This reason is used for a child served in the Birth to 3 Program who reached maximum age and was determined by the IEP team **not to be eligible** for early childhood special education services. The IFSP team did not discuss other options for service delivery with the family.
 - d. **Child turned 3, referred to LEA, eligibility pending for special education.** This reason is used for a child who was referred for an evaluation to determine special education eligibility, but eligibility has not yet been determined by an IEP team.
 - e. **Child is no longer in need of services. Successful completion of the IFSP.** This reason is used for a child who met the outcomes on their IFSP, and no longer requires services under the Birth to 3 Program. The IFSP team, including the parents, makes this determination.
 - f. **Family chose to discontinue services.** This reason is used for a child whose parents declined all services after an IFSP was in place.
 - g. **Child moved within the state.** This reason is used for a child who moved within Wisconsin with or without an initial IFSP in place.
 - h. **Child moved out of the state.** This reason is used for a child who moved out of Wisconsin with or without an initial IFSP in place.
 - i. **Death of child.** This reason is used for a child who died with or without an initial IFSP in place.
 - j. **Child under 3, Birth to 3 Program unable to locate family after many attempts.** This reason is used for a child with an active IFSP who has not reached the maximum age and for whom Birth to 3 Program personnel have been unable to contact the family or child after repeated, documented attempts.
 - k. **Child turned 3, parents did not consent to LEA referral and/or LEA evaluation.** This reason is used when a family signed the Opting Out of Local Education Agency (LEA) and State

Education Agency (SEA) Notification form, F-00169 and the Opting Out of LEA Notification button is checked in PPS.

- l. **Child turned 3, not referred to LEA as not believed to be eligible.** This reason is used for a child who was not referred to the LEA for an evaluation because the team determined that they are not potentially eligible for LEA services.
- m. **Child did not qualify for Birth to 3 Program or no evaluation recommended.** This reason is used at any point prior to the initial IFSP being developed for a child who was evaluated and determined not eligible for the Birth to 3 Program or who passed a screening.
- n. **Parents chose not to enroll in Birth to 3 Program or declined the next steps offered by Birth to 3 Program.** This reason is used at any point prior to the initial IFSP being developed when the program is either unable to connect with the family or the family declines to participate in what the program is offering.
- o. **Child turned 3 and referred to LEA prior to transfer to current B-3 program.** This reason is used for children who, prior to transferring to the current Birth to 3 Program, had been referred to the LEA by the previous county Birth to 3 Program.

If a child was referred to the LEA and moves prior to turning three, check the box below the closing date and enter the date the new county Birth to 3 program was contacted about the child moving to their county.

Child Outcome Information Section

- Enter the child's three exit child outcome ratings determined by the team. For each exit rating, select a value from 1-7. There will only be an "8" value when all three outcomes are not applicable.
- For each child outcome, choose "yes" or "no" in the field "Has the child shown any new skills or behaviors related to that child outcome since the previous rating?"
- When entering Exit Child Outcome Summary (COS) ratings there are a multitude of impossible values that can happen. Below is a chart from Infant Toddler Coordinators Association giving examples on when to select Yes and No for each child outcome rating. Remember that one cannot enter an 8 unless all child outcomes are 8.

Explanation on number	If the COS rating at time is...	If the COS rating at time is...	If the answer to the new skills question is...	Explanation why this combination of COS responses is impossible
1	7 or 6	7 or 6	No	A "no" response to the new skills question means the child has not shown any new skills or behaviors related to the outcome between entry and exit. This combination of responses is impossible since a child has to have acquired

Explanation on number	If the COS rating at time is...	If the COS rating at time is...	If the answer to the new skills question is...	Explanation why this combination of COS responses is impossible
				new skills to receive a rating of age-expected development (over the minimum time span of six months). Children must acquire new skills over time to maintain age-expected development.
2	5	6 or 7	No	A “no” response to the new skills question means the child has not shown any new skills or behaviors related to the outcome between entry and exit. A higher rating at time two means they acquired new skills.
3	5	5	No	A “no” response to the new skills question means the child has not shown any new skills or behaviors related to the outcome between entry and exit. To receive the same rating on the scale at two time points, the child has to have acquired new skills, because as children get older it takes more skills to receive the same rating.
4	4	5, 6 or 7	No	See explanation for #2 above.
5	4	4	No	See explanation for #3 above.
6	3	4, 5, 6 or 7	No	See explanation for #2 above.
7	3	3	No	See explanation for #3 above.
8	2	3, 4, 5, 6 or 7	No	See explanation for #2 above.
9	2	2	No	See explanation for #3 above.
10	1	2, 3, 4, 5, 6 or 7	No	See explanation for #2 above.

Sources of Information

1. From the “Sources of Information” drop-down menu, select all the sources used to determine each of the child outcome ratings.

- p. Once completed, click **Sources of Information** to re-collapse the table.
- q. Click **Return** to save data entered.

Chapter 12: LEA Notification Tool

The purpose of this tool is to send LEA notification for multiple children at once to a school district.

1. Click **LEA Notification** in the left Navigation Menu.
 - r. Enter service provider (“county name” Birth to 3 program).
 - s. Enter LEA (it is recommended this field is left blank).
 - t. Select **Go**.

A list of all children within the specified age range (and not closed in PPS) that need LEA Notification sent will be shown.

To send LEA notification:

1. Check the box next to each child living in a particular school district. Be sure the child resides in the district you are choosing.
 - u. Select the LEA to receive the LEA notification on these children.
 - v. Enter the email address of the Birth to 3 Program representative sending the LEA notification.
 - w. Enter service coordinator name.
 - x. Enter service coordinator’s phone number.
 - y. Click **Send Notification** on the bottom right of the page.
 - z. Repeat steps to send LEA notification to another LEA.

NOTE: To delete an LEA notification sent in error, contact the BCS TAC inbox at DHSBCSTAC@dhs.wisconsin.gov or 608-267-6767 to resolve the issue.