UF ESDS Training Documentation

1.2 Add a new Family Support Plan Service Authorization (FSPSA)

Process:

1. From the home screen:
   a. In the topmost frame, click on [Patient Data].
   b. Click the button in the [FSPSAs] column to [Add New Record].
   c. In the drop down on the right, set FIND BY to [Child’s Name].
   d. Set STATUS/CURRENT to [Active/Current].
   e. In the FIND/ADD field, type in the first three letters of the Child’s last name (in the example below, this is set to [CLA])
   f. Click the [Search] button.
2. A list of related child names should appear.
   a. Ensure this is truly a new Child by reviewing the displayed list of possible matches.
   b. To proceed, click [ADD] next to the correct child.
      -- Note: If there is only a single match, the system will automatically select that child (proceed to next step).
      -- Note: If no matches appear, check your spelling. In addition, try changing the STATUS/CURRENT fields to [ALL/ALL] and search again.

3. Complete the FSPSA Information section.
   a. Child Information will appear in the top half of this frame (circled below).
   b. When FSPSA is complete, please click [add Record] to submit the FSPSA into the system.
      -- Note: Indicated Mandatory Fields (noted in RED text) must be completed to proceed.
      -- Note: Screenshot below contains sample data—it is not real.
4. Additional Actions
   
a. Use the comment field to enter additional information as needed.
   
b. After clicking [add Record] to enter the new FSPSA, you may click on any of the following buttons to perform additional actions related to the same child:
      
      i. Click [Copy To New FSPSA] to copy the selected child information to a new FSPSA screen to enter an additional FSPSA.
      ii. Click [Copy To New Intervention] to copy child information to a new Intervention record.
      iii. Click [Check Ints] to review existing Interventions related to the active child.