

Organization and Navigation

Overview IMS contains many "Search" windows and data screens. To enter, edit or view data, the data entry person moves between these screens. This section describes the menus, screens, "hot keys", buttons and function keys used in moving around IMS.

Main Menu The IMS system has a Main Menu as well as a button system of menus on each data entry screen.

Main Menu

Area Education Agency IMS Main Menu		
<p>Child</p> <ul style="list-style-type: none"> Demographic Associated Adults Eligibility Disability Intervention Activity Planning Assistive Technology Results Extended School Year Services Severity Services <p>Adult</p> <ul style="list-style-type: none"> Demographic <p>Staff</p> <ul style="list-style-type: none"> Demographic Licenses Endorsements Departments Building Assignments 	<p>Agencies</p> <ul style="list-style-type: none"> AEA Region District Building Other Agency <p>Services</p> <ul style="list-style-type: none"> Profile Eligibility Locations Assigned Staff <p>Medicaid</p> <ul style="list-style-type: none"> View Eligible Students Enter Claims Medicaid Detail Report <p>Web IEP</p> <ul style="list-style-type: none"> Administration Review IEPs User List Web IEP 	<p>Reports</p> <ul style="list-style-type: none"> Data Entry Specific Reports AEA/LEA Reports <p>Utilities</p> <ul style="list-style-type: none"> Custom Modules Custom Utilities User Profile User Manual Known Issues Change My Password Find A Code Preferences Project Request Logout Exit/Quit

The Main Menu screen allows the data entry person to access all of the screens available within IMS.

To access any screen, the data entry person places the mouse over the screen name and clicks on the highlighted link.

Sections within the Main Menu

Child

Child

- Demographic
- Associated Adults
- Eligibility
- Disability
- Intervention
- Activity
- Planning
- Assistive Technology
- Results
- Extended School Year Services
- Severity
- Services

The child/youth is at the heart of the organization of IMS. All information dealing with the child/youth, adult/s, demographics, services, interventions, evaluations, plans and results are entered through this section.

The first link under Child is Demographic. This screen contains general child/youth demographic data.

The Associated Adults screen refers to those significant adults who have a legitimate relationship with a child/youth. This includes a child/youth's parents, guardian, foster parent and surrogate.

The Disability screen is an area to place information such as the child's/youth disability, the status, and the start and end of the disability.

Information such as the child/youth's type of Intervention, dates pertaining to and individuals involved in a meeting are captured in the Intervention screen. This screen has been designed to allow the AEA's to customize the information displayed on the screen.

The Activity screen is associated with the Intervention screen. This includes fields from the Intervention screen. This screen has also been designed to allow the data entry person to customize the information displayed on the screen.

The sixth link is the Plan screen. Data such as Plan type (e.g. IFSP, IEP), LRE and district-wide assessment those involved in the meeting and meeting type are recorded here.

The Review screen is an area to place information such as review type, date of the review, location, those involved in the meeting and meeting type.

The Assistive Technology screen is designed to place information about assistive technology devices and services identified on a child's/youth's IEP.

The ninth link is the Results screen. This is an area to place information regarding the results of an IEP or IFSP.

The Extended School Year Services screen is designed to place information regarding any service given to a child/youth beyond the school year.

The Severity Rating screen includes a Begin and End date, Goal Area/FMC, and the Delivery Method. It is primarily used to capture data collected by speech language pathologists.

The last link under the Child Section is the Service screen. This screen collects information regarding any service that the child/youth has received. Some of the fields within this screen are the Service Begin and End date, Exit Reason, Recommended Program, as well as links to the Plan screen and adjusted Program screen.

Adult



Adult
Demographic

The Adults screen refers to those significant adults who have a legitimate relationship with a child/youth. This screen contains the adult demographic information. This is the same information found in the top half of the Associated Adult screen. When the associated child button at the bottom of the Adult screen is clicked, the Child demographic screen will be displayed.

Staff



Staff
Demographic
Licenses
Endorsements
Departments
Building Assignments

Staff information is contained under Staff. The system accesses these "Profile-Type" files when running a number of screens and reports.

The first link under Staff is the Demographic which contains basic demographic data such as name, address, field office, and the hire FTE.

The Licenses screen is an area to place information about the staff member's license.

A staff member's endorsement(s) may be recorded on the Endorsement screen.

The Department Assignment screen is an area to record the district to which the staff member is associated. Fields on this screen include the start and end dates, agency, department, and area of expertise.

The last screen in this section is the Building Assignment screen. It allows the data entry person to capture the building(s) to which a staff member is associated. Fields on this screen are similar to the fields on the Department Assignment screen.

Agencies

Agencies

- AEA
- Region
- District
- Building
- Other Agency

Agency background information is contained under Agencies. The system accesses these "Profile-Type" files when displaying a number of screens and running reports.

The first link under Agencies is the AEA demographic which contains data on the Agency such as the AEA name, address and phone numbers.

The Region screen is a screen to place information about the region/sector/zone contact, address, and AEA associated with the region/sector/zone.

The District Profile screen is a screen to place information about the district contact, address, the region/sector/zone and AEA associated with the district.

The Building Profile screen is a screen to place information about the building contact, address and district associated with the building.

The Other Agency screen is an area to place information about other agencies associated with the AEA.

Services

Services

- Profile
- Eligibility
- Locations
- Assigned Staff

The Service section pertains to the instructional related services available to the child/youth. Within this section, there is a Service Profile screen and Service Eligibility. "Service" changes of classes and support services are added and modified under section. A data entry person may also access individual class rosters or support rosters by location.

The first link under Services is the Profile screen. Some of the fields within this screen are the Service, the Official Description and the WEF.

The Eligibility screen is an area to check whether the service is Medicaid eligible and/or Federal Count Eligible.

The Service Location screen is a screen to record where the service is. Region/sector/zone, attending district and attending building are some of the fields on the screen.

The Assigned Staff screen is the same screen used under the Staff section. This screen is used to search for the service associated with a staff member.

Medicaid

Medicaid

- View Eligible Students
- Enter Claims
- Medicaid Detail Report

Medicaid claims may be entered via IMS. Claim forms and several other reports continue to be printed via FoxPro. Other Medicaid-related reports have been converted to web reports.

Reports

Reports

- Data Entry Specific Reports
- AEA/LEA Reports

The Report section contains reports that relate specifically to data entry as well as reports that are available to others with permissions.

Utilities

Utilities

- Custom Modules
- Custom Utilities
- User Profile
- User Manual
- Known Issues
- Change My Password
- Find A Code
- Preferences
- Project Request
- Logout
- Exit/Quit

The utility is used by the System Manager to perform many of the custom utilities and to provide User Profiles. For most data entry personnel, the Utility section is used primarily to log out of IMS, to ext/quit the system or to change a password.

The Custom Modules contains links for modules, usually developed for a particular AEA, which expand and enhance the core IMS application.

The Custom Utilities contains utilities for doing maintenance work to the data.

The User Profile allows a person with permissions to set up another consumer of the system.

The Change My Password allows the data entry person to change his/her password used to log into the system.

The Find a Code allows the data entry person to look up a particular code's information within the system.

The Preferences allows the data entry person to utilize particular count files for future

Web IMS reports.

The Logout allows the data entry person to log out and log in to the system.

The Exit/Quit allows the data entry person to exit out of the Web IMS and the browser.

Screen Types

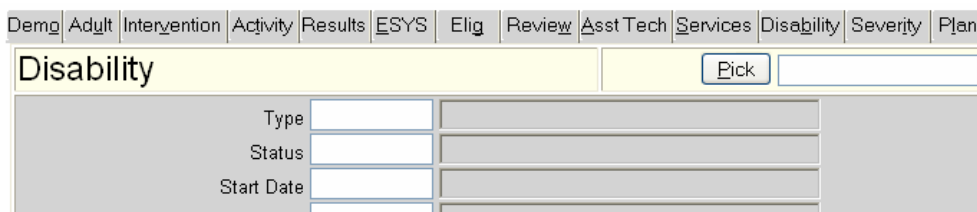
The Search screen shows a list of records for a file. The data entry person typically selects one of these records to review or modify data. These records can also be deleted as described in the next section.

The Data Entry screen contains sets of field names or labels with corresponding boxes where data is displayed when entered.

The Parameters or Filter Conditions screen is arranged from a general to a specific level of selection criteria.

Tabs

To increase the efficiency of navigating within IMS, there are tabs at the top of each screen associated with the child/youth.



These tabs allow the data entry person to move from screen to screen within the Child section. For example, if the data entry person at the Child Demo screen and wants to add a service, click on the Service screen. If the data entry person then wants to enter a plan, click on the Plan tab to go to that screen. This eliminates the need of going back to the Child Demo and clicking on the Plan button.

Buttons and Hot Keys

Each screen has a series of buttons that move the data entry person through the system. Many of the buttons have a letter that is underlined, indicating that it is a "hot key". "Hot keys" are used in combination with the "Alt" key on the PC to execute the same action as clicking on the button with the mouse.



Note: The "Hot Key" for the Result page is Alt+ Z.

The following buttons operate consistently between each screen:

Return. The Return key returns the data entry person to the point of entry on the screen. If the data entry person started from the Demographic screen and continued on to view the disability information on a child/youth, then pressing Return or "hot keying" returns the data entry person to the Demographic screen. If the data entry person has made changes to a record, it will be updated and saved.

Copy. The Copy button makes an exact copy of the contents of the screen. This will

create a new record in the file. The record that was copied will be saved.

New. The New button creates a new screen with blank fields.

Search. The Search button takes the data entry person to the specific "Browse" screen for that window. For example, if the data entry person presses Search on the Services screen, a historical listing of items in this person's file will appear.

Main Menu. This button takes the data entry person back to the Main Menu.

Cancel Changes. This button erases the changes made to a record. The data entry person should press Cancel **before any other button** when the changes are not to be saved.

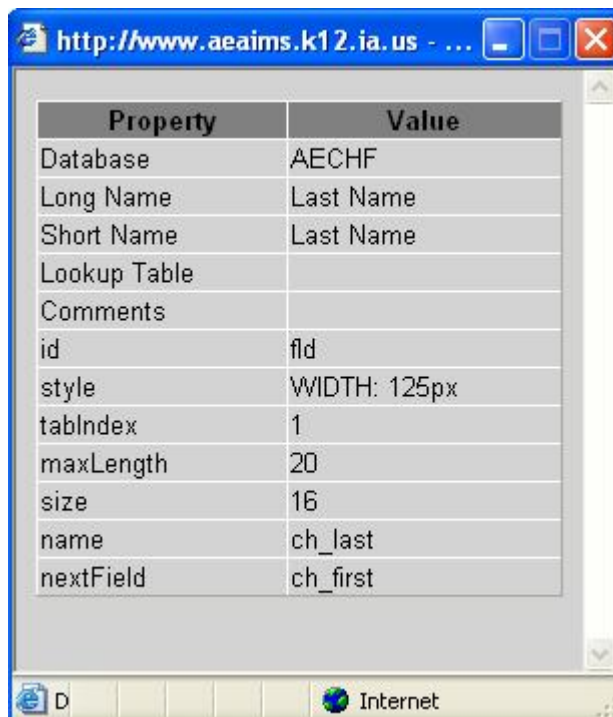
Save. This button allows the data entry person to manually save the record.

Navigation Tools within a Screen

Function Keys are found on extended keyboards. The Function Keys are found above the top row of number keys on a keyboard and are labeled as F1, F2, F3, etc.

The "F" key available to use is summarized here.

F2 – Properties. Brings up the properties of a field. This is primarily a debugging tool for programming, but it can be useful to a data entry person who is looking for a field name to add to a report.



F7 – Lookup. If the data entry person is uncertain of a data value, pressing the F7 key will access a "Lookup Table" for that particular field. An example of a "Lookup Table" follows:

Select a District Wide Assessment		Sort Order: Name	New
Number	Name	Edit	
A	Through the state alternate assessment	<input type="checkbox"/>	
M	With accommodations	<input type="checkbox"/>	
N	Without accommodations	<input type="checkbox"/>	

Some lookup fields allow the data entry person to type the code or the name. Examples: the district fields allow the data entry person to type the partial name of the district or the number of the district. The building fields act in the same manner. The zip code field allows the data entry person to type either the zip code number or the name of the city.

Pressing F7 on a date field will bring up a calendar.



F8 - Spell Checker.

F9 – Macro. This works like a find and replace. If a coded value is typed into in a text field, it will replace that coded value with the description from the database. For example, if a code of !01 is typed and then the F9 key is pressed, the !01 will be replaced with a with "*"s hearing was tested today because *." To see the entire list of macros available in the system, please look [here](#).

F10 - Updated By When a data entry person edits a record, the data entry person’s login ID, date, and time are recorded in the record. The exact change that was made, however, is not recorded. This “date/time” stamp may be viewed at the bottom left hand side of the screen, when a record is displayed:

Updated by: DBAILEY on 06/01/2005 13:14:43

When the F10 button is pressed while on a data entry screen, a window will pop-up to provide in-depth information about the data entry person who last edited this record.

F12 - Contact Info. When the F12 button is pressed while on a district field, a screen

will pop up to identify the AEA and region/sector/zone that district belongs to, as well as the IMS data entry person(s) contact. This screen also provides an e-mail to the data entry person.

Pull Down. On certain screens, there is a pull down that will allow the data entry person to choose one of several "pick" criteria. As an example, on the Child Demographic screen, the search can be done on any of the following fields:



A screenshot of a pull-down menu. The menu is open, showing a list of search criteria. The top option is "Name" with a small downward arrow icon. Below it are "ID", "Birthdate", "SSN", "Alt ID", "Medicaid", "Phonetic", and "State ID". The "Name" option is highlighted in blue.

There are several navigation tools that may be used in both the screen and the search window.

Tab Key

Screen: Moves the cursor from field to field within a screen. The movement follows the assigned tab order. The "shift + tab" key combination moves the cursor in reverse of the tab order.

Search Window: Moves the cursor down to the next row in the list. It will also display the Data Entry Person, Date and time in the lower left column for the last time this record was updated.

Home Key

Screen: Allows the data entry person to return to the first screen. For example, if the data entry person navigated to the Child Demographic screen, then to the Intervention screen, then to the Activity screen, and then pressed the "Home" key, he/she would be returned to the Child Demographic Screen.

Search Window: NA

Escape Key

Screen: NA

Search Window: Closes the window without selecting a record.

Enter Key

Screen: Advances the cursor to the next field in the tab order.

Search Window: Selects the record on which the cursor is positioned and closes the window.

Double Click

Screen: When on a field, brings up the lookup table.

Search Window: Selects the record on which the cursor is positioned and closes the window.

Summary

IMS is designed to operate in a sequential manner. There is a logical flow to accessing data or information. The data entry person selects the desired button that brings up a Search window. From the Search window, the data entry person selects the appropriate record to bring up a data screen. If there are no records or if the appropriate records do not appear in the Search window, the data entry person may add a record. To delete a record within the search window, the data entry person can select the record to be deleted and press the "Delete" button on the keyboard.

There are multiple ways to navigate between screens in IMS. When using the Main Menu, the data entry person can click on links for specific screens. Or the data entry person may navigate from one screen to another through the use of buttons or tabs.
