



EIHub

First Steps Early Intervention
Case Management System



PUBLICTM
CONSULTING GROUP

Guide to Adding a Family Member

Adding a Family Member

1. Navigate to the “Family Info” tab
2. Select the “Family Information” panel
3. Click “Edit”

The screenshot displays a software interface with a top navigation bar containing tabs: "Child at a Glance", "Child Info", "Family Info", "Assessment", "Eligibility", "IFSP", "Services", "Transfer, Transition, Exit, Close and Re-Open", and "Child/Family Outcomes Tab". The "Family Info" tab is selected, indicated by a blue arrow labeled "Step 1". Below the navigation bar, a left sidebar contains two panels: "Family Information" and "Current Family Situation". The "Family Information" panel is selected, indicated by a blue arrow labeled "Step 2". The main content area shows a "Family" section with a green header bar. Below the header, there is an "Add Family" button and a search bar. A table displays family information with columns: "Start Date", "End Date", "Last Name", and "Action". The table contains one entry with "Start Date" 03/05/2021 and "Last Name" Acklin. A blue arrow labeled "Step 3" points to the "Edit" button in the "Action" column. The table footer shows "Showing 1 to 1 of 1 entries" and navigation buttons "Prev", "1", and "Next".

Adding a Family Member

Confirm Family Base Last Name

The system will automatically open to the “Family Base” panel

4. Change or confirm the last name of the family in the “Family Name” field
5. Click “Submit”

Family

- Family Base
- Family member
- Family Cost Participation
- Family Search

Start Date: 03/05/2021

End Date:

Family Name: Acklin

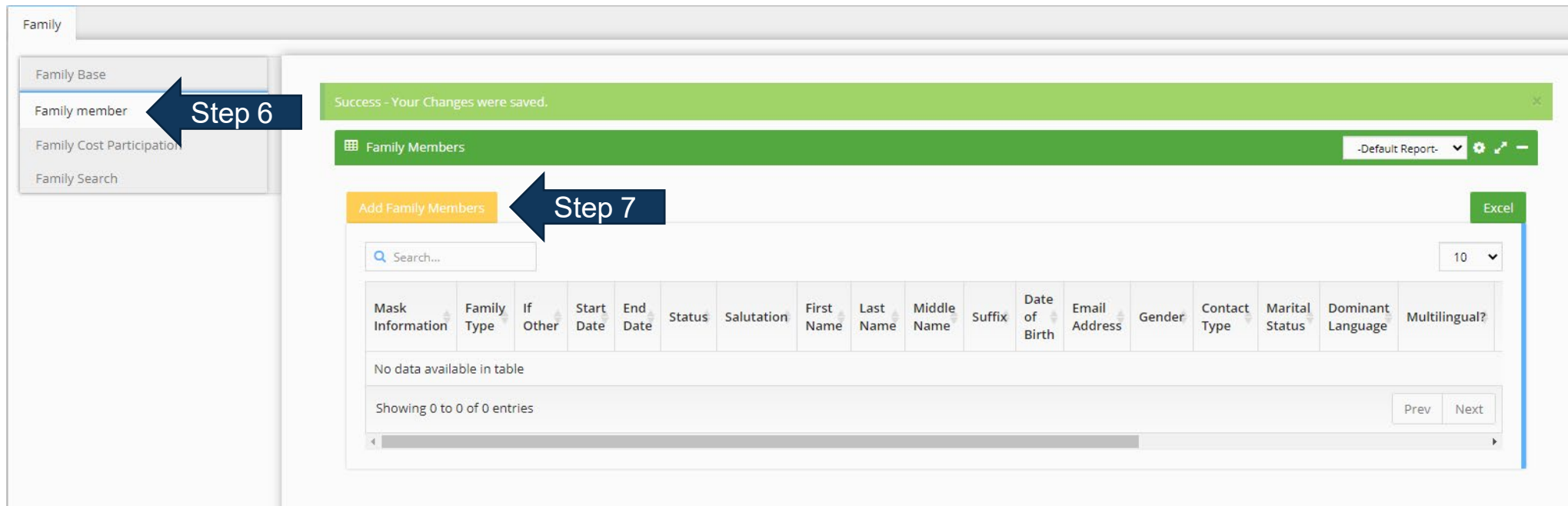
Submit

Step 4

Step 5

Adding a Family Member

6. Navigate to the “Family Member” panel
7. Click “Add Family Members”



Family

Family Base

Family member ← **Step 6**

Family Cost Participation

Family Search

Success - Your Changes were saved.

Family Members -Default Report-

Add Family Members ← **Step 7** Excel

Search...

Mask Information	Family Type	If Other	Start Date	End Date	Status	Salutation	First Name	Last Name	Middle Name	Suffix	Date of Birth	Email Address	Gender	Contact Type	Marital Status	Dominant Language	Multilingual?
No data available in table																	

Showing 0 to 0 of 0 entries

Prev Next

Adding a Family Member

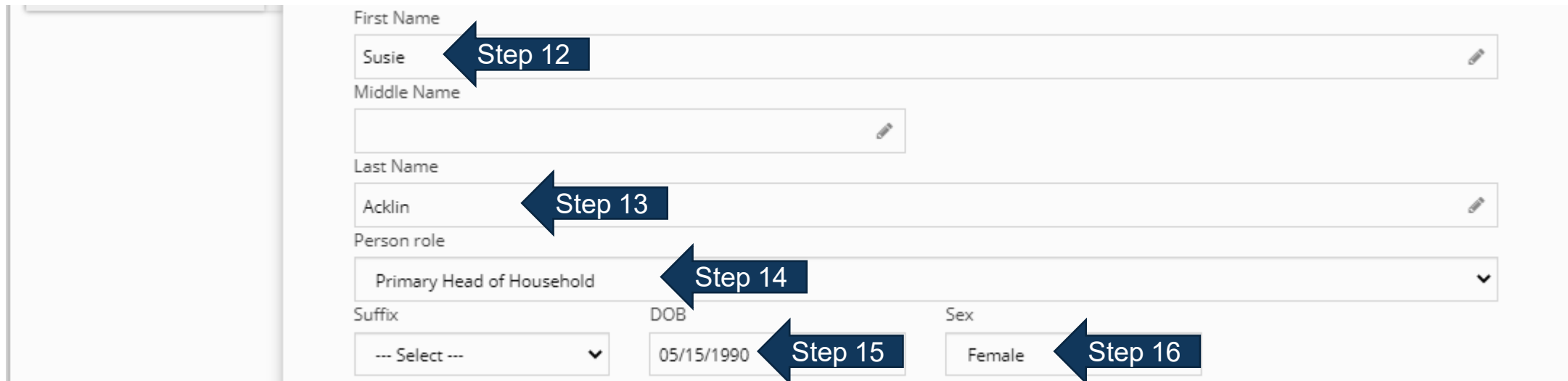
8. Navigate to the “Family Information” panel
9. Select the family member’s “Family Status” as “Active”
10. Select the most appropriate “Family Member Type” (e.g., Mother)
11. Enter description in “If Other Family Member Type” field if “Family Member Type” selected is “Other”

The screenshot shows a web form titled "Demographics" with a "Family Information" panel selected. The panel contains the following fields and options:

- Family Information**: A blue arrow labeled "Step 8" points to this header.
- Guardian Address**: A text input field.
- Phone Numbers**: A text input field.
- Family Member Secondary Languages**: A text input field.
- Mask Primary Contact / Caregiver Contact Information
- Family Status**: A dropdown menu with "Active" selected. A blue arrow labeled "Step 9" points to this dropdown.
- *Family Member Type**: A dropdown menu with "Mother" selected. A blue arrow labeled "Step 10" points to this dropdown.
- If Other Family Member Type**: A text input field with a blue arrow labeled "Step 11" pointing to it.

Adding a Family Member

12. Enter the family member's first name in the "First Name" field
13. Enter the family member's last name in the "Last Name" field
14. Select the role in the family as the "Person Role" (e.g., Primary Head of Household)
15. Enter the family member's date of birth in the "DOB" field
16. Select the appropriate gender for the family member as the "sex" field



A screenshot of a web form for adding a family member. The form fields are: First Name (Susie), Middle Name (empty), Last Name (Acklin), Person role (Primary Head of Household), Suffix (--- Select ---), DOB (05/15/1990), and Sex (Female). Blue arrows point to each field with labels: Step 12 points to First Name, Step 13 points to Last Name, Step 14 points to Person role, Step 15 points to DOB, and Step 16 points to Sex.

First Name	Susie	Step 12
Middle Name		
Last Name	Acklin	Step 13
Person role	Primary Head of Household	Step 14
Suffix	--- Select ---	
DOB	05/15/1990	Step 15
Sex	Female	Step 16

Adding a Family Member

17. Select the appropriate “Contact Type” for the family member (e.g., Primary Contact)
18. Enter the family member’s email in the “Email Address” field if available
19. Select the family member’s “Primary Language”
20. Select the checkboxes if an interpreter or written translation is needed for the family member

Contact Type

Primary Contact **Step 17**

Email Address

sacklin@email.com **Step 18**

Marital Status

--- Select ---

*Primary Language

English **Step 19**

If Other

Interpreter Needed Written Translation Needed **Step 20** Permission To Always Contact

Adding a Family Member

21. Select the checkbox if First Steps has “Permission to Always Contact” the family member
22. Select the family member’s highest level of education in the “Education” field
23. Click the checkbox “Insures Child” if the family member is the policy holder for the child’s insurance
24. Click “Submit”

The screenshot shows a form with the following elements:

- Three checkboxes at the top: "Interpreter Needed" (unchecked), "Written Translation Needed" (unchecked), and "Permission To Always Contact" (checked). A blue arrow labeled "Step 21" points to the checked checkbox.
- An "Education" dropdown menu with "High school graduate" selected. A blue arrow labeled "Step 22" points to the dropdown.
- A "Notes" text area below the education field.
- A checkbox "Insures Child" (checked) at the bottom left. A blue arrow labeled "Step 23" points to it.
- A blue "Submit" button at the bottom right. A blue arrow labeled "Step 24" points to it.

Adding a Family Member

Entering Family Member's Address

25. Navigate to the "Guardian Address" panel
26. Click "Add"

Demographics

Family Information

Guardian Address **Step 25**

Phone Numbers

Family Member Secondary Languages

Mask Information Priority Status Start Date End Date Type Address Address 2 Address 3 City Zip Code County **Step 26** Add

No data available in table

Showing 0 to 0 of 0 entries

Prev Next

10

Adding a Family Member

Entering Family Member's Address

27. Select the family member's "Address Priority" (e.g., Primary)
28. Select the family member's "Address Type" (e.g., Home)
29. Select "Active" as the family member's "Address Status"
30. Enter the "Start Date" of the family member's address as the date the information was collected

Add Guardian Address ×

*Address Priority Primary ▼ **Step 27**

Mask Information

*Address Type Home ▼ **Step 28**

*Address Status Active ▼ **Step 29**

*Start Date 03/06/2021 **Step 30**

End Date

Adding a Family Member

Entering Family Member's Address

31. Select from "List of Child Addresses" to populate fields if family member shares the address
32. Click the checkbox if the family member should "Receive Family Outcome Survey" when the child exits
33. Enter or confirm the family member's address
34. Click "City/State/Zip Lookup"
35. Click "Submit"

The screenshot shows a web form for adding a family member's address. The form includes a dropdown menu for "List of Child Addresses" with the option "Select a Child Address" selected. Below this is a checkbox labeled "Receive Family Outcome Survey?" which is checked. The address fields are as follows: "*Address" (1234 Just off Main), "Address 2" (Second Floor), "Address 3" (empty), "*Zip Code" (47250), "City" (Indianapolis), "Address State" (IN), and "Address County" (Marion). At the bottom of the form, there is a checkbox for "Address is Validated" which is checked, and two buttons: "Address Validate" and "City / State / Zip Lookup". The "Submit" button is highlighted in blue, and the "Cancel" button is in red. Callout boxes with arrows point to various elements: "Step 31" points to the dropdown menu, "Step 32" points to the "Receive Family Outcome Survey?" checkbox, "Step 33" points to the address fields, "Step 34" points to the "City / State / Zip Lookup" button, and "Step 35" points to the "Submit" button.

Viewing the Family Member's Address

The system will automatically return to the "Guardian Address" panel
36. View the newly entered family member's address in the grid

Demographics

- Family Information
- Guardian Address**
- Phone Numbers
- Family Member Secondary Languages

Search:

10

Mask Information	Priority	Status	Start Date	End Date	Type	Address	Address 2	Address 3	City	Zip Code	County	State	Validation	Add
False	Primary	Active	03/06/2021		Home	1234 Just off Main	Second Floor		Indianapolis	47250	Marion	IN	True	Edit

Showing 1 to 1 of 1 entries

Prev 1 Next



Adding a Family Member

Entering Family Member's Phone Number

37. Navigate to the "Phone Numbers" panel
38. Click "Add"

Demographics

Family Information

Guardian Address

Phone Numbers **Step 34**

Family Member Secondary Languages

10

Phone Number	Is Primary	Type	Okay To Text	Step 35 Add
No data available in table				
Showing 0 to 0 of 0 entries				

Prev Next

Adding a Family Member

Entering Family Member's Phone Number

39. Select the appropriate "Phone Number Type" (e.g., Cell)
40. Enter the family member's phone number in the "Phone Number" field
41. If this is the family member's primary phone number, click the checkbox "Is Primary Phone?"
42. If the family member allows texting, click the checkbox "Okay to Text?"
43. Click "Submit"

Add Guardian Phone Number ×

*Phone Number Type
Cell ← Step 39

*Phone Number
(123)-456-7891 ← Step 40

Is Primary Phone? ← Step 41

Okay To Text?
Yes ← Step 42

Notes

→ Step 43

Viewing the Family Member's Phone Number

The system will automatically return to the "Phone Numbers" panel

43. View the newly entered phone number in the grid

Demographics

Family Information
Guardian Address
Phone Numbers
Family Member Secondary Languages

Search:

10

Phone Number	Is Primary	Type	Okay To Text	Notes	Add
(123)-456-7891	True	Cell Phone	Yes		Edit

Showing 1 to 1 of 1 entries

Prev 1 Next

Adding a Family Member

Entering Family Member's Secondary Language

44. If needed, navigate to the “Family Member Secondary Languages” panel
45. Click “Add”

Demographics

Family Information

Guardian Address

Phone Numbers

Family Member Secondary Languages

Secondary Language

Added By

Modified By

Step 44

Step 45

Add

Showing 0 to 0 of 0 entries

Prev Next

Adding a Family Member

Entering Family Member's Secondary Language

46. Select the secondary language of the family member in the "Language" field

47. Click "Submit"

Add Guardian Secondary Language ×

*Language

Arabic **Step 46**

Step 47

Viewing the Family Member's Secondary Language

The system will automatically return to the “Family Member Secondary Languages” panel 48. View the newly entered secondary language in the grid

Demographics

- Family Information
- Guardian Address
- Phone Numbers
- Family Member Secondary Languages**

Search:

Secondary Language	Added By	Modified By	
Arabic	zwyricksuper	zwyricksuper	Delete

Showing 1 to 1 of 1 entries

Prev 1 Next



Viewing the Family Member

49. Navigate to the “Family Tab”
50. Select the “Family Member” panel
51. View the newly added family member in the grid

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a 'Family' tab selected, with a blue arrow labeled 'Step 49' pointing to it. Below 'Family' are four sub-items: 'Family Base', 'Family member', 'Family Cost Participation', and 'Family Search'. A blue arrow labeled 'Step 50' points to the 'Family member' sub-item. The main content area has a green header bar labeled 'Family Members' with a '-Default Report-' dropdown and icons for settings, refresh, and close. Below the header is an 'Add Family Members' button and an 'Excel' button. A search bar is present with a magnifying glass icon and the text 'Search...'. A dropdown menu shows '10'. Below the search bar is a table with the following columns: Mask Information, Family Type, If Other, Start Date, End Date, Status, Salutation, First Name, Last Name, Middle Name, Suffix, Date of Birth, Email Address, Gender, Contact Type, Marital Status, and Doi Lar. A blue arrow labeled 'Step 51' points to the first row of the table, which is highlighted with a blue border. The data in this row is: False, Biological Mother, (blank), 03/05/2021, (blank), (blank), (blank), Susie, Acklin, (blank), (blank), 05/15/1990, sacklin@email.com, Female, Primary Contact, (blank), and Eng. Below the table, it says 'Showing 1 to 1 of 1 entries' and has 'Prev', '1', and 'Next' buttons. A horizontal scrollbar is visible at the bottom of the table area.

Mask Information	Family Type	If Other	Start Date	End Date	Status	Salutation	First Name	Last Name	Middle Name	Suffix	Date of Birth	Email Address	Gender	Contact Type	Marital Status	Doi Lar
False	Biological Mother		03/05/2021				Susie	Acklin			05/15/1990	sacklin@email.com	Female	Primary Contact		Eng



EIHub

First Steps Early Intervention
Case Management System



PUBLICTM
CONSULTING GROUP



For assistance, contact
the EIHub Helpdesk:



(877) 522-1065



INFirstSteps@pcgus.com

Hours: Weekdays 8 a.m.- 5 p.m. ET

