

## Offline IFSP

The Offline IFSP is currently available for Initial IFSP's. It is HIGHLY recommended to test the Offline IFSP to get familiar with the look and feel prior to going out and doing a Live Offline IFSP.

To download the most current version of the Offline IFSP please go here:

<http://www.eicolorado.org/index.cfm?fuseaction=Training.content&linkid=996>

Select the Offline IFSP link

Click the carrot 'up' arrow in the download bar and then select Show in folder Copy and drag to desired location

Prior to opening the folder users will need to download and unzip the contents

Note: If you did not select a folder to Save the Offline IFSP to then the documents should appear in your Downloads folder

### Unzipping the Offline IFSP Folder

- Locate the folder labeled Offline\_IFSP(3).zip
- Right click the folder and select Extract All
- Select a Destination and Extract Files then click Extract
- From there, users will see five different folders and an HTML file called 'IFSP\_Offline'
  - The HTML file is the Offline IFSP
- The file will open in your default web browser. Users have the option to open it in Internet Explorer, Firefox or Chrome by right clicking the file and selecting *Open with*. It is NOT recommended to open with Microsoft Word
- To create an Offline Initial IFSP users will need to open the html file labeled 'Offline\_IFSP'
  - It will appear as though internet is needed but it is not
- The Offline IFSP will open (verify that it is in the correct format)
- Populate all of the fields
  - Keep in mind that if entering information in a Look Up field and the information does not match exactly to what exists currently in the Data System the information will not upload
  - To upload relevant contact information the system is cross referencing the relationship related to the client contact
  - Best practice is to keep a copy of all relevant contacts and look ups entered while completing the Offline IFSP
    - \*\* *Another option is to omit these sections and add relevant contacts and look ups after the IFSP has been uploaded to the system*
- In the top right corner of each tab is a button labeled Download, once users have completed the **entire** IFSP they will select Download to Save the Offline IFSP
- If users close the window a pop up will appear asking them if they want to Stay on the Current page of Leave Current Page. If Download is complete users can select Leave Current Page

- It is highly recommended to keep the Offline IFSP open until the document has been uploaded into the data system
- Once complete select Download and verify the IFSP has saved to the desktop. The file will be renamed Offline IFSP - *Client Name* - Today's Date
  - If users close the window and try to open the file it will open in a .txt file. Best practice is to keep the Offline IFSP window open on the screen until the IFSP has been uploaded to the UNICORN

## Uploading the Offline IFSP

- Login to the EI Data System
- Navigate to the correct client case
- On the Client Case Detail section there is a button labeled Upload Offline IFSP
- Select the Upload Offline IFSP button
- Locate the saved Offline IFSP
  - Verify the correct Offline IFSP is being selected to upload
- Click Open
- The system will then take users to the Initial IFSP in the Visual Force layout
- Verify that an Initial IFSP (and the related records) were uploaded successfully
- Update look up's if necessary
  - Best practice to keep the original Offline IFSP open to verify all information was entered correctly
- Save IFSP

The Offline IFSP Webinar can also be located at the above link.