

Using TA Notes



This document is intended for Technical Assistance providers (TAs) or ISD Monitors and will explain the purpose, how to access, and complete TA Notes in CIMS.

WHAT IS THE PURPOSE OF TA NOTES?

For each Corrective Action Plan (CAP) or Toolkit issued in CIMS, the Office of Special Education (OSE) has provided a TA Notes page available on each CAP menu (or Toolkit Menu). The purpose is to keep a comprehensive record of the technical assistance provided to a local district so that OSE can document that the local has been provided assistance.


OSE requests that the TA Notes page be kept up to date by the TA provider (for FM CAPs, UNC CAPs, and Toolkits). **The TA provider uses this page to document all contact with the district including CAP or Toolkit development, progress report notes, and updates on the activities of the CAP or Toolkit.** The TA Notes page is a documentation forum for both the work of the district on their CAP (or Toolkit) and the work of the TA provider for billing purposes.












HOW DO I ACCESS TA NOTES?


1. Open the Corrective Action Plan (CAP) either via the Compliance Tab or your Task List;

A screenshot of the CIMS web application interface. At the top, there is a navigation bar with links for Reports, Administration, Organization(s), Profile, and Logout, and a SHOW HELP button. Below the navigation bar is a Back button. The main heading is "B-10-FM Compliance and Correction Menu" with a sub-heading "Please complete all required forms below." and a link for "Document Information: B-10-FM-CAP" with a Details button. A "Resources" section contains a table with four items: "Instructions for Completing a FM Corrective Action Plan", "FM CAP Documents", "SLCAP Summary", and "FM CAP Closeout Checklist". At the bottom, there is a footer note: "For additional help and resources, visit the training website at http://cims.cenmi.org."

2. Once on the Compliance and Correction Menu (or Toolkit Menu), scroll down to the **Forms** section; and
3. Select the form **TA Notes** for CAPs or **FM TA Notes** for FM CAPs (the example below is from an FM CAP).
4. If working on an Uncorrected Noncompliance (UNC), make sure to complete and save your work **in the original CAP** on a monthly basis (not in the UNC).

Forms 

Status	Page Name	Note	Created By	Last Modified By
	FM CAP Cover Page			
	FM CAP Finding Page (3)			
	FM CAP Summary (MS Word document)			
	Progress Report			
	FM TA Notes			
	FM Closeout Verification Worksheet (to be completed by TA/MDE)		CIMS System	12/2/2013 11:00:44 AM
	FM Verification Appendix (to be completed by TA)			
	FM Final Closeout Report			
Ready to Change the FM CAP Status?				
	Click Here to Change the FM CAP Status			
	View Status History			
	Document Menu			



HOW DO I COMPLETE TA NOTES?

5. The top half of the TA Notes page is provided to record the ongoing technical assistance provided at the beginning of the CAP Process.
6. Be sure to include your name and contact information under the **TA Team** section.
7. Then, begin documenting your contact with the district under the **TA Notes – Interaction Highlights** section. For each contact with the district, be sure to include the date, your initials, Contact Type (select from the drop-down menu), any applicable notes, and then rate the visit.



The district cannot view or access the TA Notes page; only the assigned TA Provider, ISD Representative, or MDE may view and edit the TA Notes page.

8. Remember to **SAVE** each time you record information on the TA Notes Page. Note that the SAVE button is located in the top right corner of the TA Notes Page.



We recommend that you save your work often. CIMS has a 20-minute timeout feature for security purposes. If you get timed out of the system, your work will be automatically saved as of the time-out.

SAVE **CHECK GLOBAL ERRORS**

[Back](#)

Document Information: [B-10-FM-CAP](#)

[Details](#)

You are here: > [B-FM Compliance & Correction Menu](#) > [Forms Menu](#)

TECHNICAL ASSISTANCE (TA) NOTES

****Please save your work every 10 minutes due to the 20-minute timeout feature in CIMS****

TA Team
Instructions: Record the name and contact information of everyone on the TA Team. To create additional rows, press the **SAVE** button.

Name: Name:
Title: Title:
Email: Email:
Phone: Phone:

TA Notes - Interaction Highlights
Instructions: Record your TA notes for this district within the following log. If you need additional rows, please press the **SAVE** button. To upload a document to support your notes, please click the Browse button below.

Date	Initials	Contact Type	Notes	Rate Visit Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Browse...

9. Use the browse button under **TA Notes – Interaction Highlights** to upload any supporting documents, such as an Assurance Statement. After uploading documents or entering information, be sure to select the **SAVE** button at the top of your screen.



Due to differences in internet browsers, the screenshot example above may not match your screen view exactly. For example, Chrome users may have **Choose File** instead of a **Browse** button.

10. At the end of the CAP Process, complete the **TA Provider Feedback and Reflection** located at the bottom of the TA Notes page.

11. OSE recommends that this section is completed prior to submitting the CAP to MDE for Closeout.

The following section should be completed at the end of the CAP Process

TA Provider Feedback and Reflection
Instructions: In an effort to improve the TA component, please reflect on the process and provide feedback in the space provided below.

Strengths: What went well during the provision of technical assistance? What interventions were particularly effective?
If you need additional rows, please press the **SAVE** button.

- 0 of 1000

- 0 of 1000

Areas of Concern: What problems did you encounter during the technical assistance process?

0 of 2000

Areas for Improvement: What would you do differently in the future?

0 of 2000



Remember to select the **SAVE** button at the top of the screen after entering information or uploading a document before closing out of the system.

WHO CAN I GO TO FOR HELP?

12. If you need technical assistance with CIMS or completing the TA Notes page, contact the CIMS Help Desk at 877-474-9023 or help@cimsmichigan.org.

13. If you have a policy question about the technical assistance process or the content required for the TA Notes page, contact Jeanne Anderson Tippet at AndersonTippetJ@michigan.gov.