

BTT Online Manual Document Upload and Naming Protocol

When uploading WV Birth to Three (WVBTT) Standard Documentation, the BTT Online bulk upload function will automatically title your documents and place them into the correct folder. However, there will be some documents that will need to be uploaded using a manual upload where titles will have to be generated by the person uploading the document. The person uploading the document will also be required to select the correct folder in which the document belongs in to maintain the consistency of document organization within the Child Library. This guidance document will provide guidelines on how to properly title and upload a document to the BTT Online Child Library without using the bulk upload.

Before you proceed to Step 1

Please Note - Naming your files on your personal device is different than creating a title for your document in the Child Library. WV Birth to Three does not require you to name your files on your personal device in any specific way. However, to avoid error messages during the upload process follow these 2 rules:

1. Create a unique file name on your personal device for every document – never name 2 files the same.
2. Never use any of these illegal characters in your file name on your personal device:

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The screenshot shows the BTT Online Child Library interface. The header displays the child's name 'Salt, Sacramento-State-green - 201545720', their date of birth 'DOB (5/5/2020)', and a referral date 'Referral (11/16/2021)'. The user is logged in as 'SBeardRAU'. The sidebar on the left contains navigation links: Summary, Child Detail, Family, EI Dates, Authorizations, Physician, RAU Transfer, Child Library (highlighted), COSF, and Team Note. The main content area is titled 'Child Library' and features a '+Add Document' button. Below this, there are input fields for 'File Name *' (with a 'Browse...' button), 'Title *', 'Folder *' (a dropdown menu), and 'Description'. At the bottom, there is a status bar showing 'Uploaded/Last Modified by SBeardRAU' and the date '5/13/2022 10:53:48 AM'. 'Cancel' and 'Save' buttons are located at the bottom right.

Step 1:

- Navigate to the child library of the child you wish to upload a document for and click the **+Add Document** button.
- Be sure the document you are uploading belongs to the child's library you are uploading to.

Step 2:

- Browse your device for the document you wish to upload.

Step 3:

- Enter a title for the document:

WV Birth to Three is requiring that document 'Titles' be named in a consistent manner when uploaded to the WVBTT Online Child Library

1. WVBTT Standard Documentation:

Title Format: YYYYMMDD WVBTT Form Title

YYYYMMDD is the date in the header of the document

WVBTT Form Title is the title of the form located at the top of the form in bold. Use exactly what is there, you can copy and paste.

A WVBTT Referral Form received via fax on 05/11/2022:

Title: 20220511 WVBTT Referral Form

An Evaluation/Assessment Report completed on 5/11/2022:

Title: 20220511 WV Birth to Three Evaluation/Assessment Summary Report

2. Other documents that are not WVBTT standard documentation such as medical documents, legal documents, other requests to release records, diagnostic reports, progress monitoring reports, fax communications, ASQ SE, and intervention plans:

Title Format: YYYYMMDD Type of Document

YYYYMMDD is the date the document was completed/received **or** the date you are uploading if the document doesn't have a date

Type of Document is the type of document you are uploading from the list below:

- Medical Record
- Legal Document
- Request to Release Child Record
- ASQ SE
- Diagnostic Report
- Progress Monitoring Report
- Intervention Plan
- Fax Communication (only if it isn't one of the types from the list above)

Examples:

A document that represents a legal name change for the child that you received on 05/13/2022:

Title: 20220513 Legal Document

An official report from a doctor documenting a diagnosis for a child completed on 5/07/2022:

Title: 20220507 Medical Record

An ASQ SE questionnaire completed with the family on 4/27/2022:

Title: 20220427 ASQ SE

Step 4:

- Place the document in the correct folder according to the Child Library Folder Organization Chart
 1. WVBTT Standard Documentation will have the folder indicated in the header of the document. You must select the folder that matches what is on the document.
 2. Other documents that are not WVBTT Standard Documentation:

Type of Other Document	Folder
Medical Record	E/A Reports
Legal Document	Administrative
Request to Release Child Record	Record Requests
ASQ SE	E/A Reports
Diagnostic Report	E/A Reports
Progress Monitoring Data	Progress Monitoring
Intervention Plan	Progress Monitoring
Fax Communication (only if it isn't one of the other types above)	Communication Logs

Step 5:

- Enter a description of the document:

Describe what is contained in the document you are uploading. Be descriptive enough so that someone reading it will know what the document contains without having to download it.

Examples:

An Evaluation/Assessment Report completed on 5/11/2022 by a Developmental Specialist:
Title: 20220511 WV Birth to Three Evaluation/Assessment Summary Report
Description: E/A Report by DS

A document that represents a legal name change for the child that you received on 05/13/2022:
Title: 20220513 Legal Document.
Description: A copy of the child's birth certificate documenting a legal adoption and name change

An official report from a doctor documenting a diagnosis for a child completed on 5/07/2022:
Title: 20220507 Medical Record
Description: A medical report from Dr. Smith documenting the diagnosis of Autism

An ASQ SE questionnaire completed with the family on 4/27/2022:
Title: 20220427 ASQ SE
Description: ASQ SE questionnaire by DS

If you have any questions, please contact a member of the WV Birth to Three State Staff – [Directory Link](#)