Frequently Asked Questions – Efforts to Outcomes (ETO) New Configuration

Migration Period Issues

How do I review efforts, assessments, and uploads that I entered in the old system?

To see the previously recorded efforts and assessments, use the navigation bar on the right side of the Home Page, and follow the steps below:

- Click on 'Participant History'.
- Click on 'Review Participant Efforts (NEW)'.
- Enter the last name, Social Security Number (SSN), or case number of the beneficiary you want to see, and hit 'Search'.
- Click on the beneficiary name, and hit 'Enter'.
- Select the date range you want to review. Best practice is to use a specific date range rather than selecting all dates. We recommend that you use the date range 8/1/2015 to date – unless you think the person was enrolled prior to the 8/1/15 date.
  **TIP: When you hit the continue button, please be patient, it may take a bit of time before the new screen comes up, and you won't see any indication that the system is processing.
- Once the screen refreshes, scroll down and open the toggle (+) next to the item you want to view in the 'Detailed Statistics' section (Referrals, Point of Service Elements, or Assessments).
- To see multiple efforts at once, click the + next to each of the recorded efforts you want to view.
- If you want to view efforts or assessments in both programs, change the 'Scope' field at the top right of the page to 'Site'. This will then show efforts and assessments, and uploads recorded for the beneficiary in the I&R and WIPA programs.
- To review the referral details from the Help Line, change the 'Scope' to 'Enterprise'.

Viewing Uploaded Files:

- Use the same steps as above. In the 'Detailed Statistics' section, open the 'Assessments' toggle, then click on the 'Update' link.

- Click on 'View/Edit' and then when the pop-up box displays, click on the link next to 'File Name' to view the file you previously uploaded.
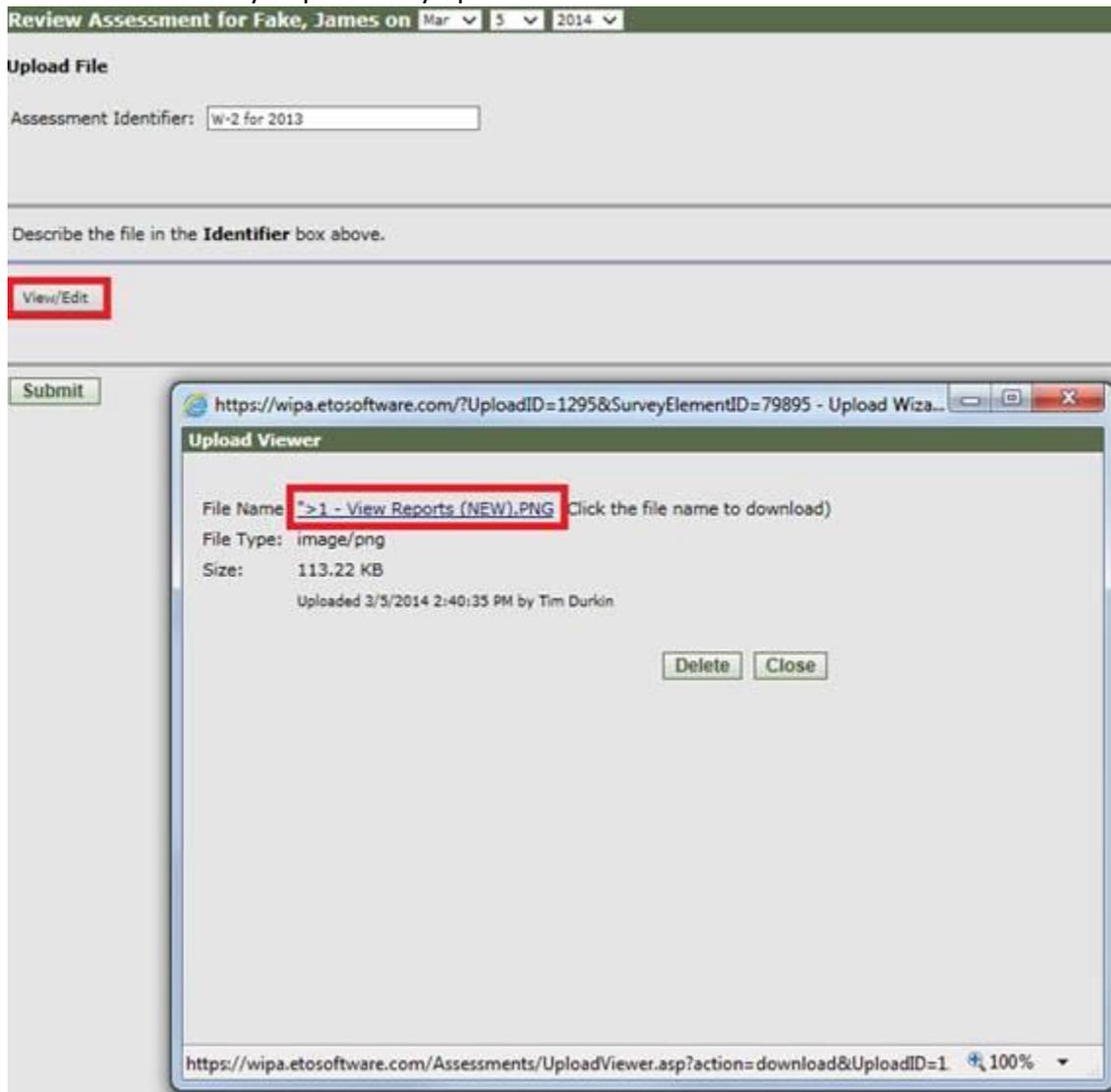
How do I schedule a next contact to appear on my To Do List?

We have temporarily disabled the fields on the baseline and efforts forms that previously allowed you to schedule a next contact and add to your "To Do" list. There is a known issue in the new configuration that is causing error messages to appear when scheduling next contact dates. Social Solutions expects to release a fix for this defect in early January. The 'Schedule Next Contact' fields will be re-enabled as soon as the issue is resolved.

How do I remove the contacts that are already on my To Do List once I complete the task?

Items that you previously added to your To Do List should still be available to review during the migration period. When you complete a task currently on your To Do List, do **NOT** use the links that show next to the item. For example, the option of 'Update Assessment' will show next to a scheduled task. Do not click that link; instead, you would go back to the participant dashboard for that person, and record a new TouchPoints to document the task that showed on the To Do List.

Be aware that although you completed a TouchPoint to document completion of the task on your To Do List, it will not clear from the list. Remember that items created in the old system have not yet migrated to the new configuration. Once the data migration is complete, the To Do List should function as before, where taking action on something (recording a TouchPoint) would then remove it from the list.

I really relied on the To Do List; how can I track my next scheduled contacts for beneficiaries until the To Do List is functioning again?

Until the data migration is complete, you might try tracking scheduled contacts by using an electronic calendar, or creating a Word document on your WIPA laptop to help you keep track of upcoming follow-ups. Your electronic calendar or document should list the ETO case numbers (no PII) and tasks for completion for beneficiaries that you would normally put on your To Do List.

When I update a field on the demographics page (View/Edit Beneficiary), I am getting an error message about required fields not completed, but they seem to be duplicated fields; what should I do?

This is an expected behavior until the migration is complete. Some of the fields on the demographics page have new choices in the new configuration, so they actually now show as duplicate fields. The duplicated fields from the prior configuration will be marked as (old), and they will have the original data you entered displayed in the field. Because the migration has not yet completed, the new fields that are required don't have the old data in them yet. When you update or change something such as the assigned staff, you will also need to complete those new required fields. You should be able to scroll through the form and see the previously entered data for those "old" fields.

IMPORTANT NOTE: In order to save any updated information, something that is different from what is in the "old" field, you will also need to update the "old" field that corresponds to the one you just updated. It is critical that you do this so that the migration doesn't overwrite the new information with what was in the "old" field. You do not need to go back and do this for all your cases, only when you make an update to a field. The purpose of the migration is to move the existing data into the corresponding new fields.

Using the New Features

How do I access the Efforts or a Baseline Assessment in the new system?

There are various ways to get to the place where you could record a TouchPoint (efforts, baseline assessment, or upload).

From the Home Page:

- Click on the link 'Beneficiary Effort' for efforts, or in the WIPA program, click on 'Beneficiary Assessment' for the baseline.
- On the next screen, enter the case number or SSN to find the participant, hit 'Search'.
- Select the appropriate form/action on the next screen. Choices include: Baseline Assessment (WIPA program only), Effort Form (both programs), and Upload (both programs).
  NOTE: The beneficiary name will show in green at the top of this page, and is an active link. If you click on the name here, it will take you to the beneficiary dashboard.
- Click 'Take New TouchPoint' on the next screen.

Alternately, you can also use any of the following methods to record a TouchPoint:

1. Quick Search for the beneficiary, click on the beneficiary name in the results, select 'View/Record Touchpoint', then proceed as above.
2. From the beneficiary dashboard, select the '+New' link in the Recent Efforts or Recent Assessments section.
3. From the beneficiary dashboard, select the 'Record TouchPoint' link in the Action Links section.

I see that there are more choices in the BS&A Status and WIP Status sections of the Effort form; does that change how we record efforts related to the BS&A or WIP?

The new Effort form now provides distinct options for different activities that you may perform related to development of a BS&A or a WIP. Not only are there new status options, there is also a distinct type of service option at the top of the effort form. When you are recording an effort related to BS&A or WIP development, the type of service would be: Report Writing.

Once you are at the section of the effort form titled 'BS&A Development / Status' effort, there are now several distinct options to choose from when recording the BS&A effort tasks. The options include:

- Development of BS&A (writing, peer or TA review, finalization)
- BS&A Completed and Sent
- BS&A Updated
- Reviewed BS&A with Beneficiary

The way you would record your efforts for BS&A development in the new system is slightly different from the prior guidance in the old system. Following is an example of how to properly record BS&A or WIP development efforts in the new system.

Effort #1

- Type of Service Provided: Report Writing
- BS&A Development/Status: **Development of BS&A**
- Notes: Began analyzing information gathered, BPQY, and follow up info from WIL. Prepared initial sections of BS&A.
- Time Spent on Contact: 30 minutes

Effort #2

- Type of Service Provided: Report Writing
- BS&A Development/Status: **Development of BS&A**
- Notes: Completed initial writing of BS&A and sent to supervisor for review.
- Time Spent on Contact: 45 minutes

Effort #3 (recorded by the supervisor reviewing BS&A)

- Type of Service Provided: Report Writing
- BS&A Development/Status: **Development of BS&A**
- Notes: reviewed BS&A developed and returned to CWIC with comments.
- Time Spent on Contact: 30 minutes

<u>Effort #4</u>

- Type of Service Provided: Report Writing
- BS&A Development/Status: **BS&A Completed and Sent**
- Notes: Revised BS&A based on comments from supervisor. Mailed to beneficiary.
- Time Spent on Contact: 15 minutes

<u>Effort #5</u>

- Type of Service Provided: Report Writing
- BS&A Development/Status: **Reviewed BS&A with Beneficiary**
- Notes: Phone call with beneficiary to go over any questions about the BS&A. Reviewed calculations sent with BS&A.
- Time Spent on Contact: 60 minutes

Note how the status options differ for separate parts of the overall BS&A development process.