Iowa Department for the Blind

User Guide

version 1.0.0

Empowering people who serve the public®

PUBLISHED BY Tyler Technologies, Inc.
12901 Worldgate Drive, Suite 800, Herndon, VA 20170
COPYRIGHT © Tyler Technologies, INC. All rights reserved.

No part of the contents of this manual may be reproduced or transmitted in any form or by any means without written permission.

Vocational Rehabilitation & Independent Living Case Management is a registered trademark of Tyler Technologies, Inc. Other product and company names mentioned herein may be the trademarks of their respective owners.

Vocational Rehabilitation & Independent Living Case Management is a client data tracking and management platform that can be implemented immediately and configured continuously to model your workflow and business processes with minimal programming. Whether it's based on-premises or in the cloud, Vocational Rehabilitation & Independent Living Case Management streamlined approach scales from the local office to the enterprise, giving everyone in your organization the ability to accurately capture, track and report on the data that drives operations forward.

We welcome feedback from our users regarding the Vocational Rehabilitation & Independent Living Case Management product or documentation. If you have comments, corrections, suggestions, etc. with regard to the product or this manual please email: support@entellitrak.com

SUPPORT INFORMATION

✉ EMAIL: fd-iadbvrteam@tylertech.com

Revision History			
Version Number	**Date**	**Author**	**Description**
1.0	03/25/2024	ALL	Initial Draft Complete - Phase I

Contents

Acronyms

Acronym	Definition
BTO	Base Tracked Object, an object with no parents. Example: Client is a BTO
COE	Certificate of Eligibility
CTO	Child Tracked Object, an object with a parent object. Example: Program is a CTO of a Client BTO.
IL	Independent Living (program)
ILOB	Independent Living Older Blind (program)
ILYB	Independent Living Younger Blind (program)
RDO	Reference Data Object, an object containing data referenced by BTOs, CTOs and code in the system. The data in RDOs are what drop down lists, multi-selects, and other fields are populated with i.e., race and language
SQL	Structured Query Language is used to extract information from a database
VR	Vocational Rehabilitation (program)

Table 1: Acronyms

1 Tracking Inbox

Every major category of data has its own Tracking Inbox and it is located in the left menu. The tracking inbox for the Vocational Rehabilitation and Independent Living Case Management will appear differently to the user based on their role.

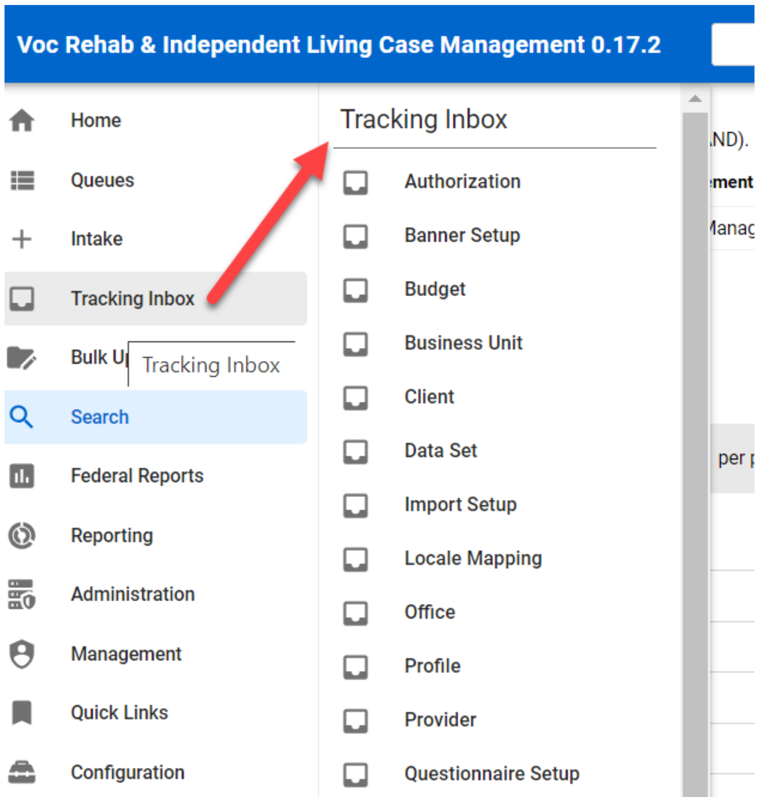


Figure 1-1 Tracking Inbox Menu Display

The Tracking Inbox allows the user to navigate throughout the system accessing different information and completing different tasks. It allows for the creation of Authorizations that are not associated with a plan (i.e., Authorizations associated to a Potentially Eligible client), budget set up, provider set up, etc.

When searching for specific information (i.e., Provider) it is important to remember that items in the tracking inbox are only those that have been created/added by the specific user. If looking for full information (i.e., a provider listing) navigate to **Search** > **Provider** and locate the full list that way.

2 Search

Any field on any form can be configured to allow users to search on the data by using Standard Search or Advanced Search. Search results are limited based on if the field is marked as searchable, the user's role and System and/or Tracked Data Permissions.

The Core Search features are as follows:

- Standard Search – An ad hoc search interface that provides multiple search operators for each field within an object.
- Advanced Search – Allows users to define search criteria, configure search result format, save searches, and share searches with other users in the same role. Saved searches may also be displayed as a link on the dashboard. This feature is disabled by default.

Search is located in the left menu panel.

2.1 Standard Search

To navigate to the Standard search this can be done one of two ways, either by clicking on Search on the left menu or expanding the menu and clicking the specific item to be searched on in the listing.

Clicking on search in the menu will display items to search on:

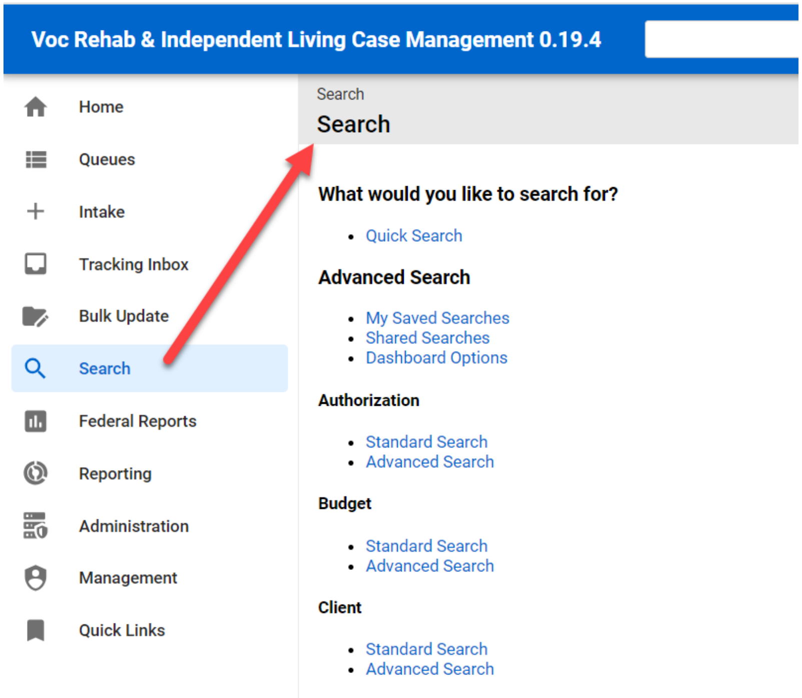


Figure 2-1 Clicking on Search Directly

Hovering over search and expanding the menu:

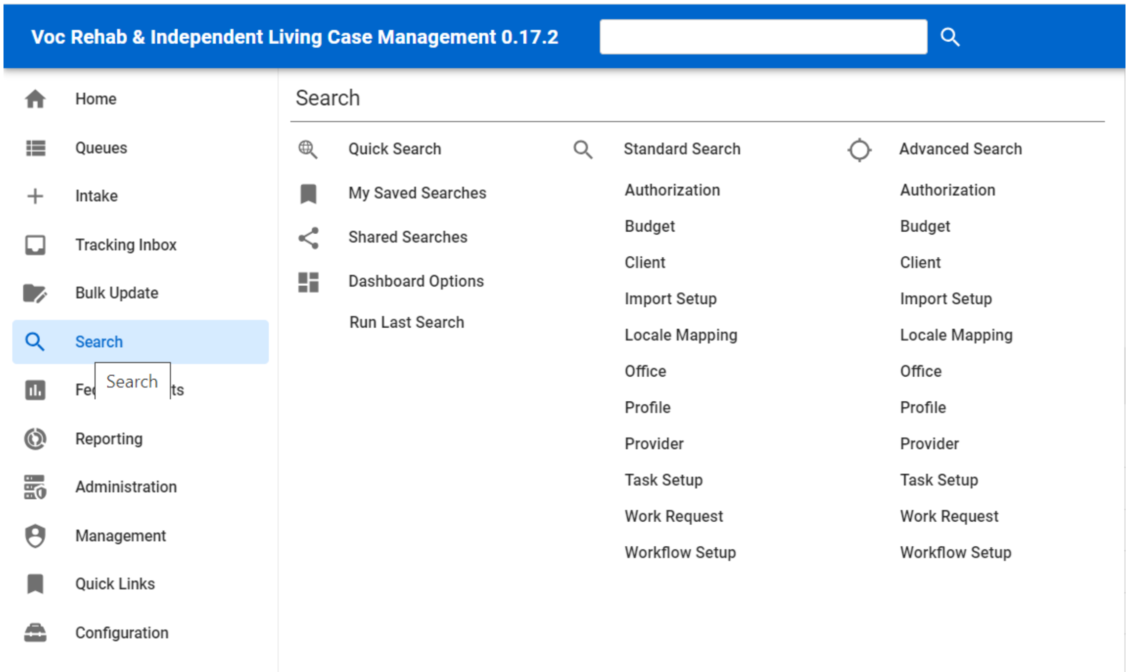


Figure 2-2 Search Menu Expanded

Standard search allows the user to do general searches by category or filter data by specific information. For this example, Client is being searched.

1. On the expanded menu click on **Client**.

Note: All search criteria options function the same way as described.

2. The Search Criteria will display:

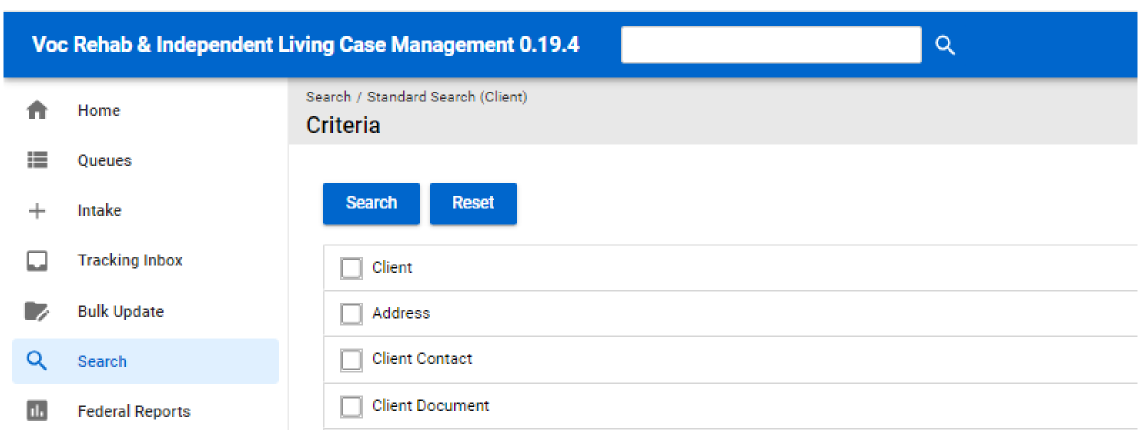


Figure 2-3 Search Criteria

3. Clicking any of the criteria boxes will expand the search criteria for that data point:

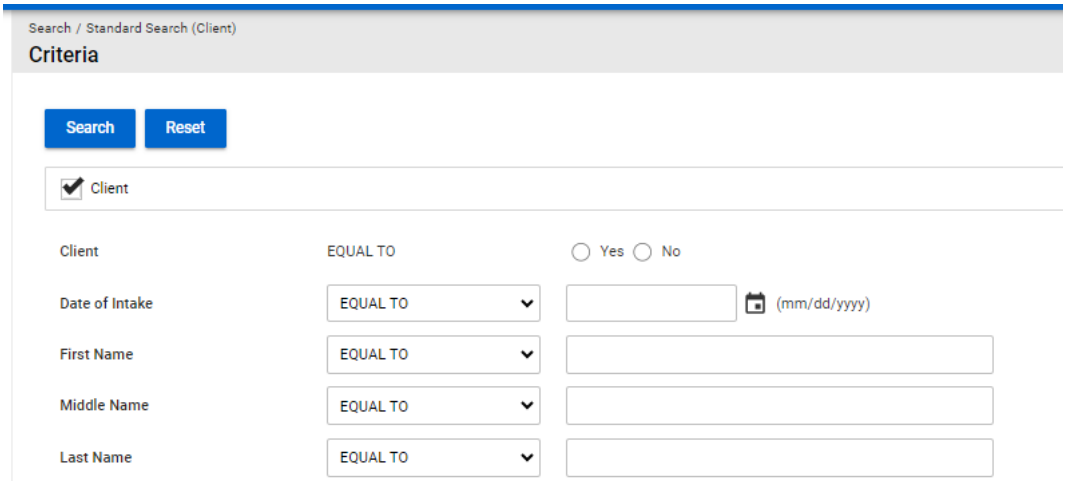


Figure 2-4 Search Criteria Expanded

4. Modifying the **'Equal To'** drop-down will modify the data that is returned when searched:

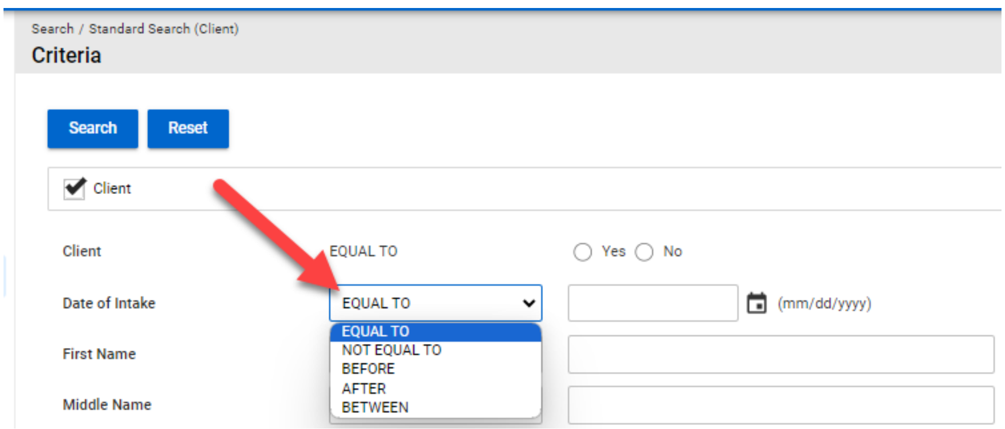


Figure 2-5 Search Option Drop-Downs (Equal To options)

5. Fill in all the information wishing to be searched on and select the **Search** button on the bottom of the screen.

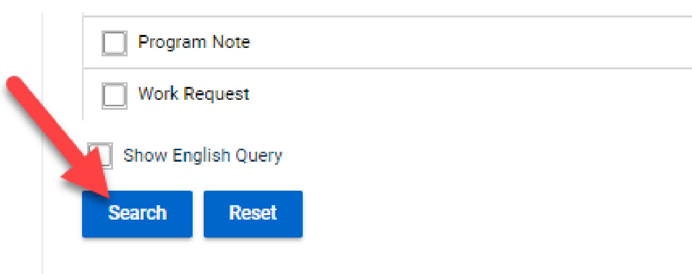


Figure 2-6 Search Button

6. The search criteria chosen will display:

Note: For this example, Referrals are being searched on; Client box selected and Client Equal To = No.

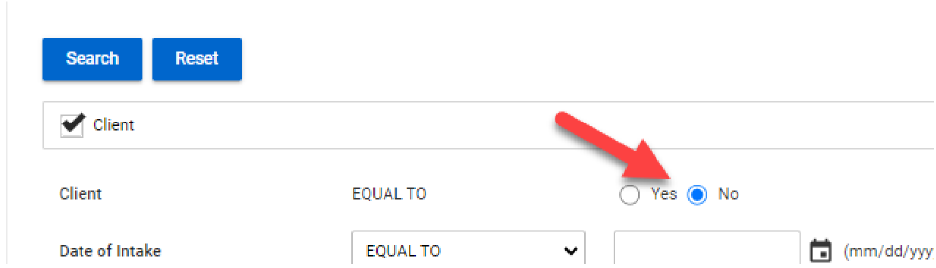


Figure 2-7 Searching for Referrals

7. Search results returned all referrals:

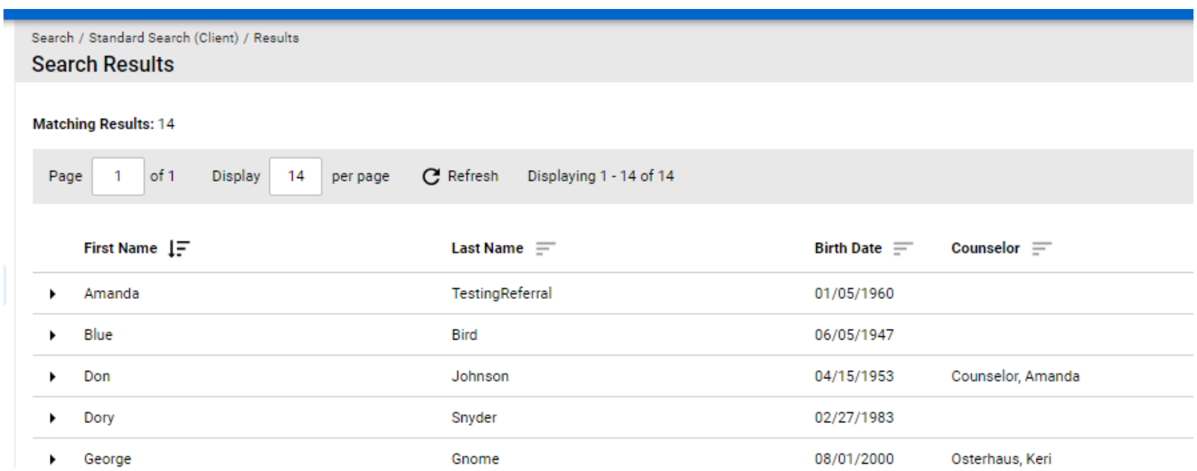


Figure 2-8 Search Results

8. Clicking any of the records within the search will open that client's (or referrals) client record.

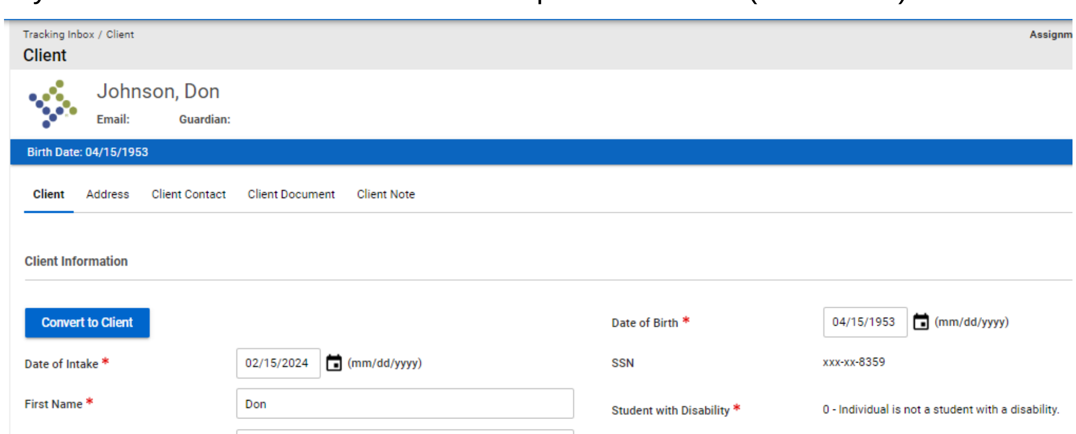


Figure 2-9 Referral Record Clicked from Search

2.2 Advanced Search

Note: For this example, Referrals are being searched on; Client box selected and Client Equal To = No.

Navigating to the Advanced Search can be done two ways, just as Standard Search was done.

1. From search Navigate to the **Advanced Search.**
2. The Advanced Search will display:

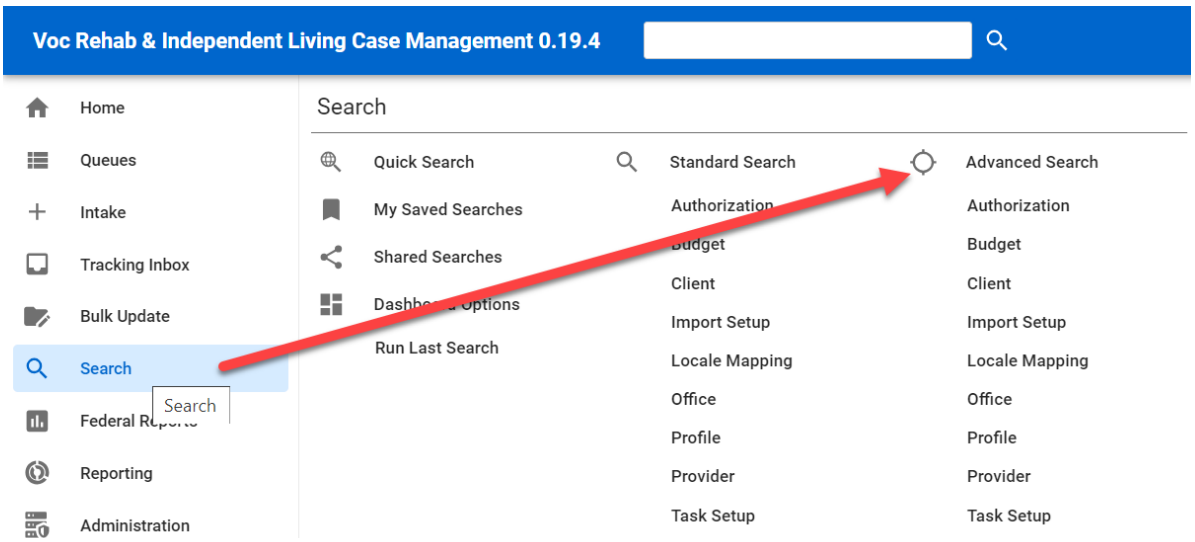


Figure 2-10 Advanced Search

3. Advanced Search will display:

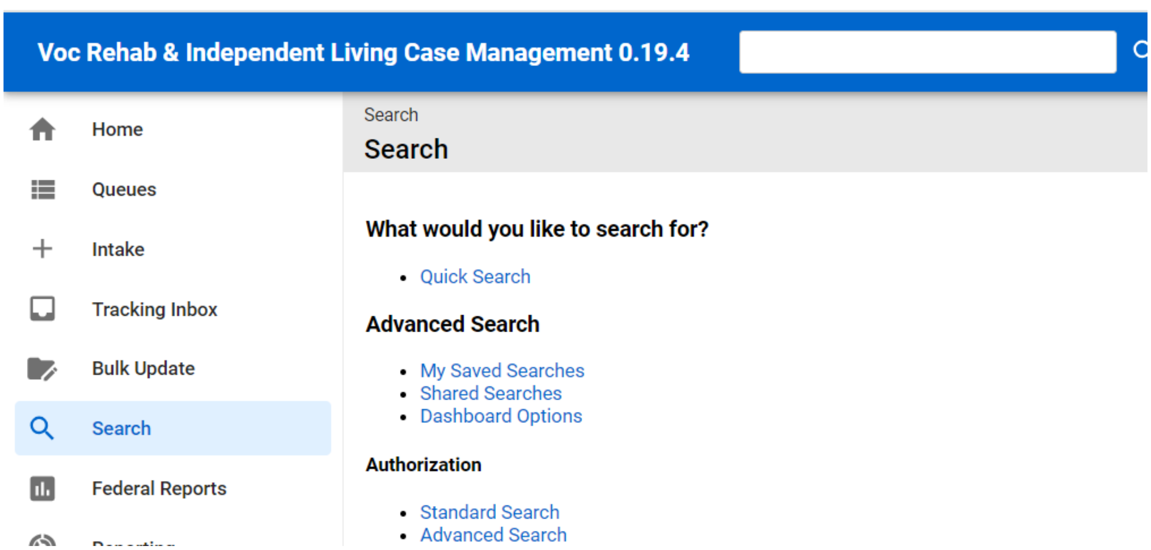


Figure 2-11 Advanced Search Options

From this screen the user can accessed Saved Searches, Shared Searches and Dashboard Options. For this example, Client, Case Manager and Intake Dates will be searched on using Advanced Search.

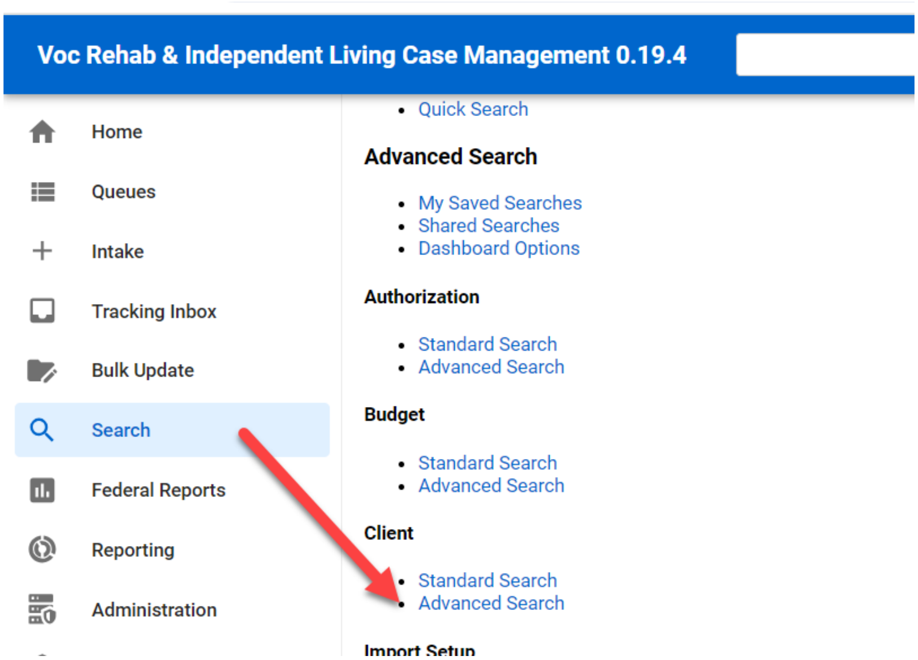


Figure 2-12 Advanced Search > Client

4. Click on the Advanced Search link under the Client header. The Advanced Search criteria screen will display:

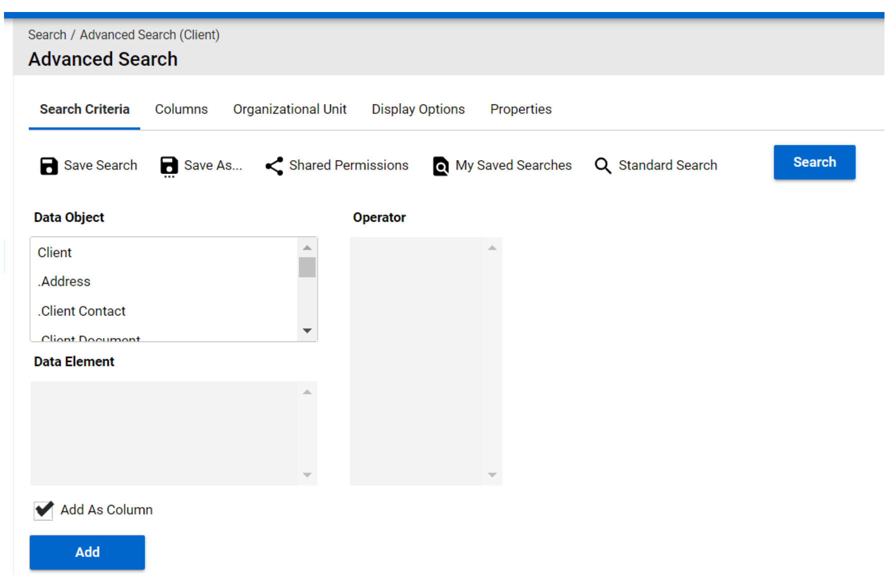


Figure 2-13 Advanced Search Criteria

5. The Search Criteria is determined based on what is selected as the **Data Object**, **Data Element,** the **Operator,** and the **Value**.

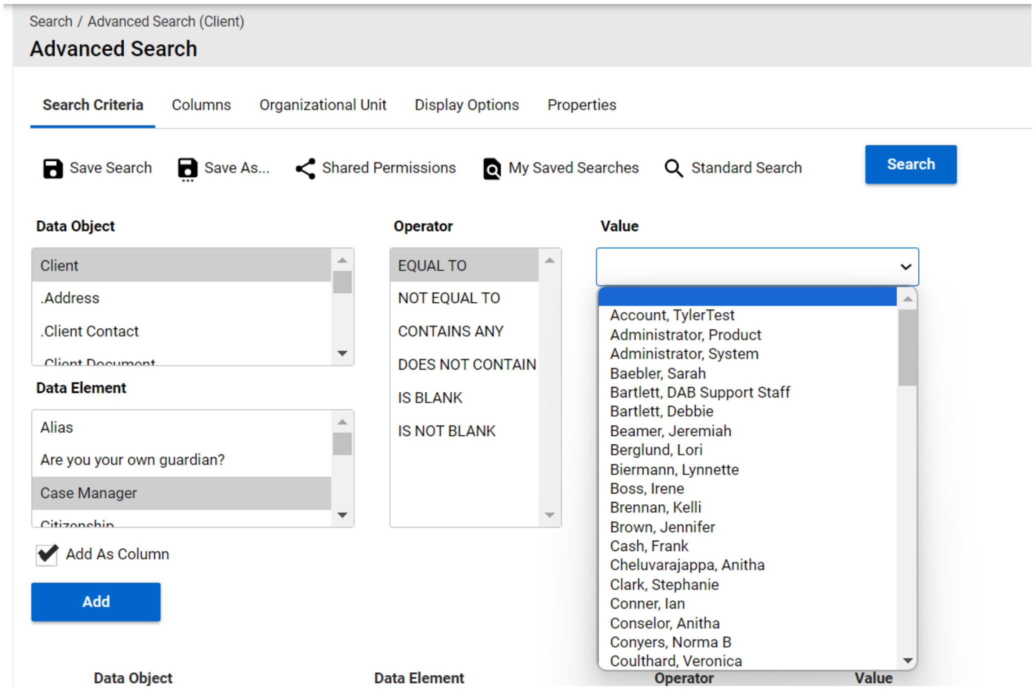


Figure 2-14 Entering Search Criteria

6. Click **Add** column as the criteria are chosen:

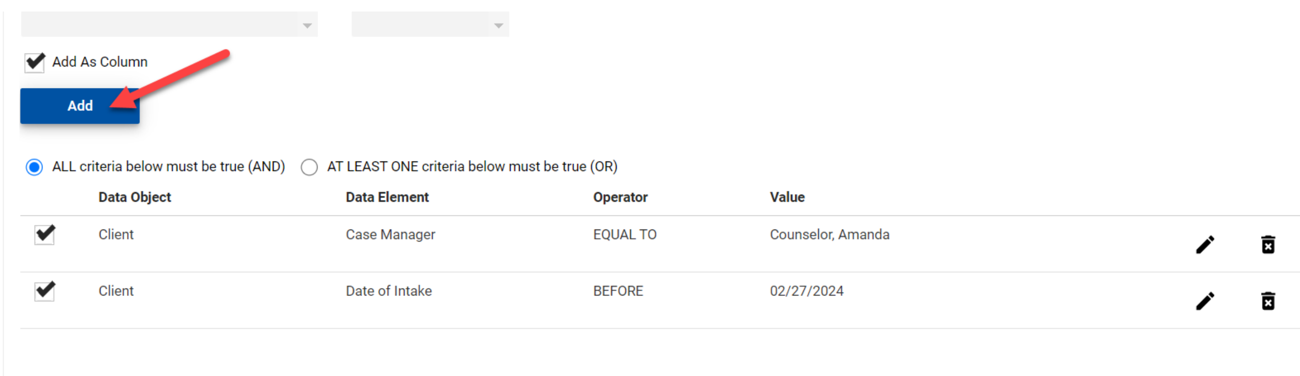


Figure 2-15 Adding Columns for Search

For this example Client and Case Manager was chosen. Then Client with a Date of Intake prior to 02/27/2024.

7. Once all the criteria are chosen select **Search** at the top of the screen.

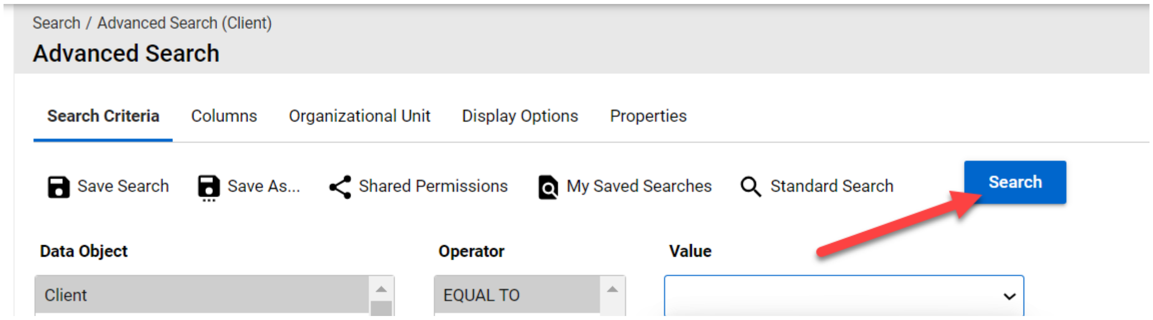


Figure 2-16 Search Button

8. The Search Results will display:

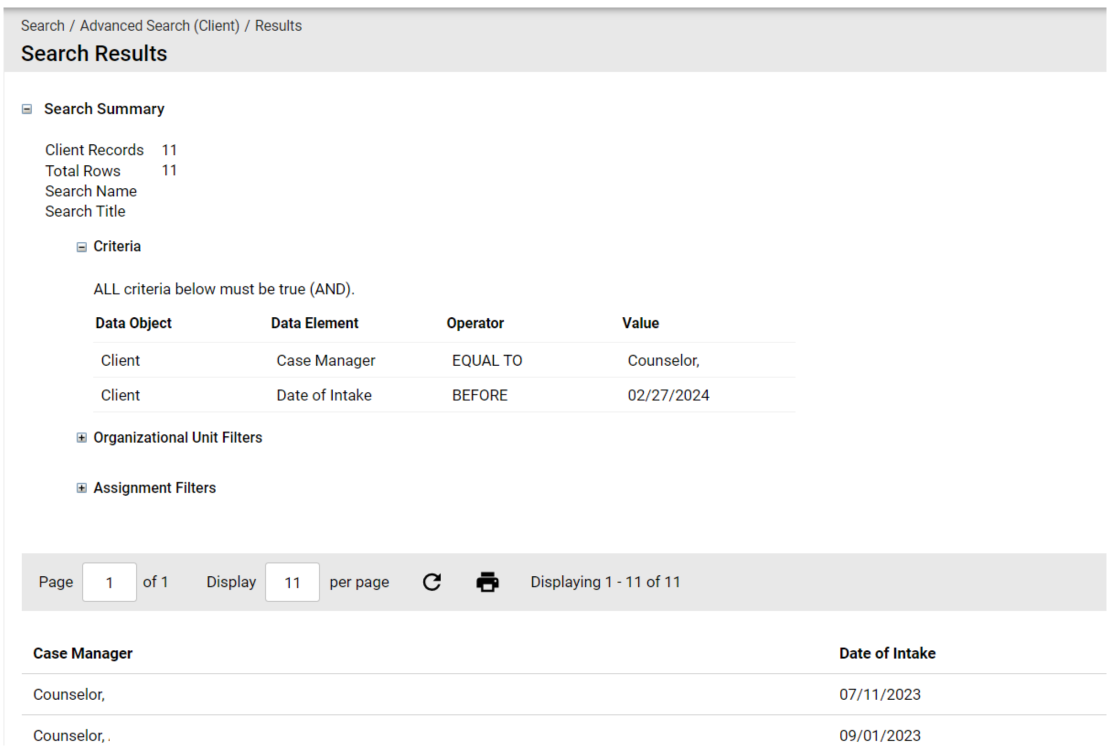


Figure 2-17 Search Results

9. The search can be saved for future use if desired by click the '**Save Search**' or '**Save As**' at the top of the search screen (the user can also navigate to save the search through the **Properties** tab):

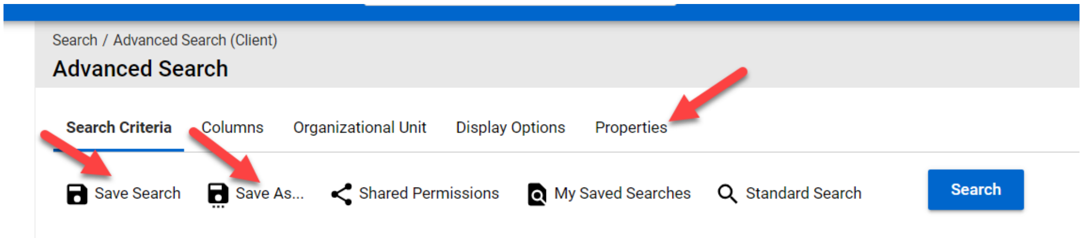


Figure 2-18 Saving Search

10. When clicking on '**Save Search**' a box will display letting the user know they must provide a name for the search under the '**Properties**' tab (this is not an Error; only a notification).

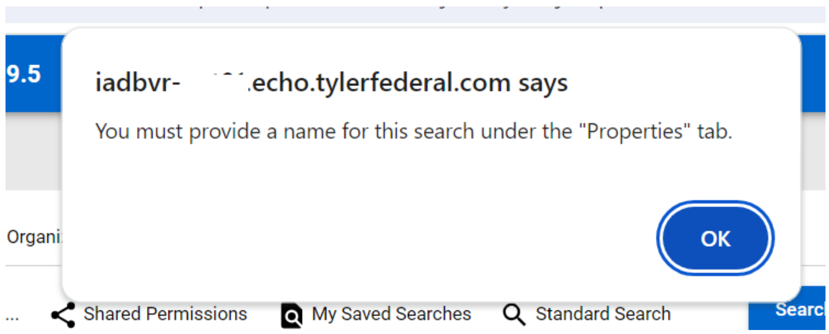


Figure 2-19 Workflow Message: Properties

11. Click '**Ok**'.

12. The Properties Tab will open the form to **Name**, add a **Title** (not required), and enter the **Description** for the Search Criteria.

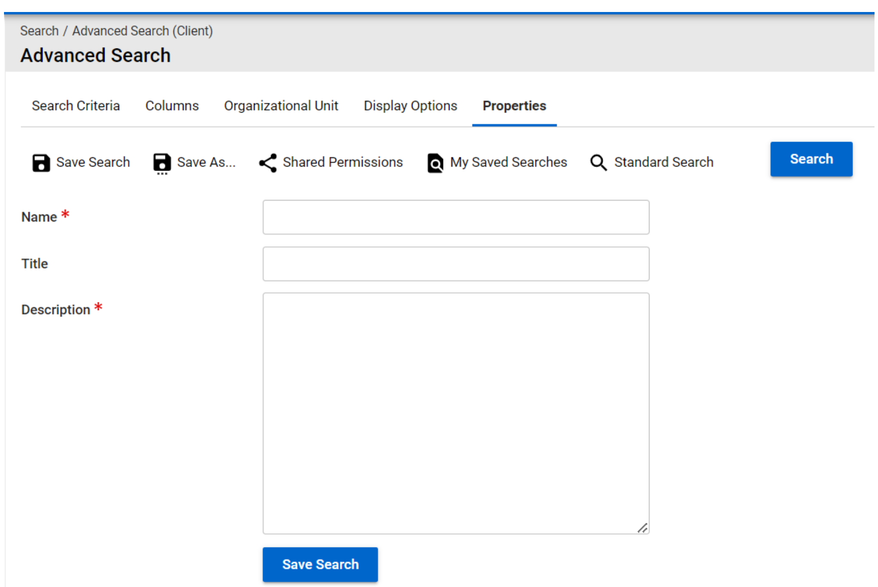


Figure 2-20 Advanced Search Properties Tab

13. Enter the required information.
14. A blue box will display with 'Search Saved'.
15. To access the saved search click on 'My Saved Searches'.

Note: If you attempt to navigate to 'My Saved Searches' and haven't saved anything yet, you will see a warning that you are leaving the page and changes may not be saved. Click '**Leave**'.

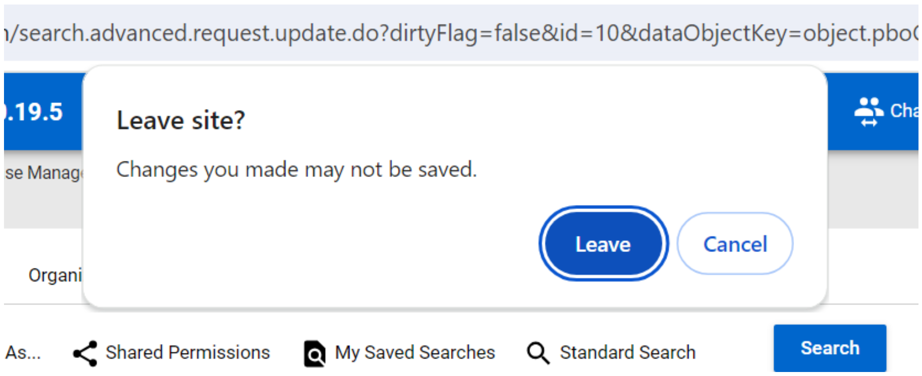


Figure 2-21 Leaving Search Site/Page

16. My Saved Searches will display:

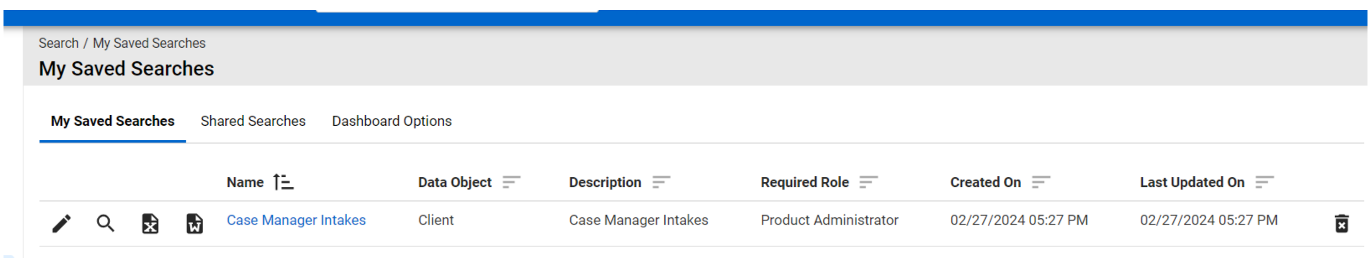


Figure 2-22 My Saved Searches Display

17. Clicking the **Name** of the saved search will bring up the search criteria.

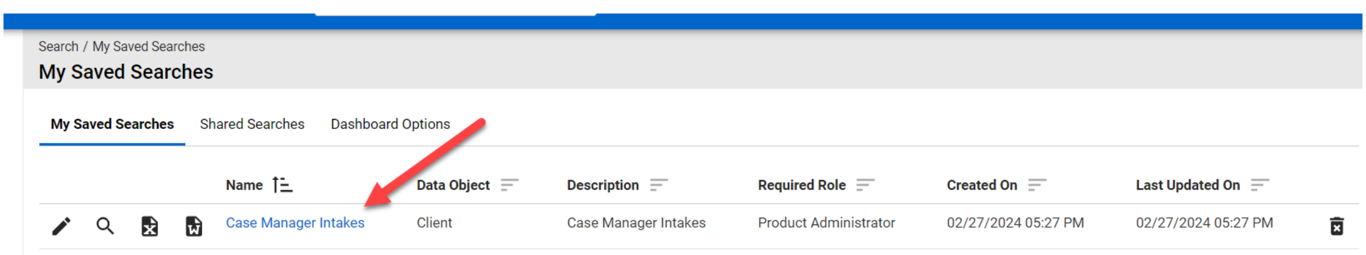


Figure 2-23 Search Name Link

18. The search can be edited by clicking the **pencil** icon (or clicking directly into the link); the search can be re-run by clicking the **magnifying glass**. It can be downloaded to either and Excel .xls or Word .doc file by clicking either the **page** icon(s) with the X (Excel) or W (Word).

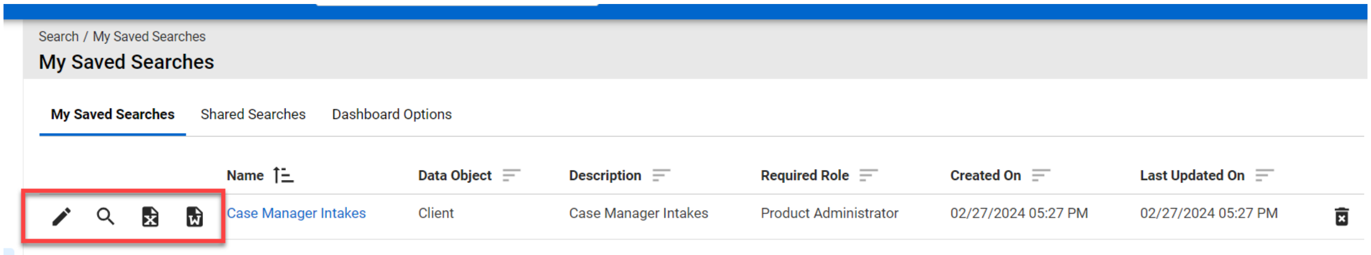


Figure 2-24 Saved Search Functions

19. To delete a saved search that is no longer needed click on the **Trashcan** icon with the 'X' on the far-right side of the listing.

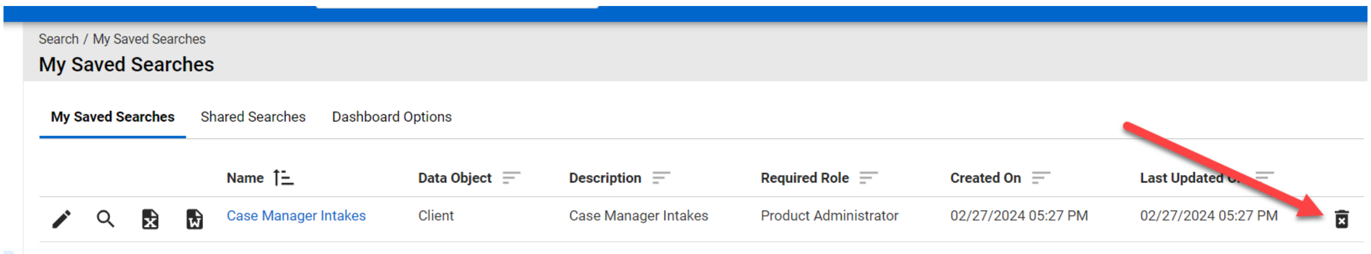


Figure 2-25 Trashcan Icon to Delete

3 Managing Client Information

The Client data is managed in the Vocational Rehabilitation and Independent Living system via the Client Record. Once a client is created, the Client Record contains all information for that client, including the: Program, Address, Client Contact, Education, Client Document, and Client Note.

Note: All forms should be completed in a top-down manner. Many fields populate based on what was input into the previous field.

Example: The Office location will populate based on the city, county, state provided.

Features:

- Users can create Clients or Referrals at Intake.
- Users can add the following to Clients or Referrals:
  - Programs (only available when Client = Yes; not available for Referrals)
  - Addresses
  - Client Contacts
  - Education Information
  - Client Documents
  - Client Notes
- Users can convert a Referral into a Client record.
- Users enter information onto Client records that will appear on RSA 911 Report

Once a client record has been created it will display in the 'Clients' queue.

Note: This queue will display both Referrals and Clients. In the Client Column if Client = No, this is a Referral. If Client = Yes, this is a client with an associated program.

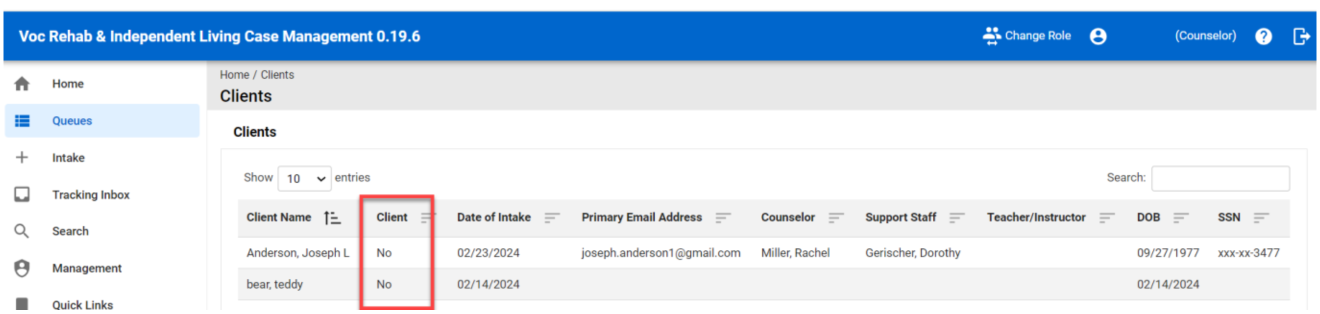


Figure 3-1 Clients Queue

3.1 Client vs. Referral

The Vocational Rehabilitation system distinguishes between a Client Record, and a Referral Record. A Client record has additional required fields.

If entering a 'Client' record this is saying the client is ready to apply/go through the Vocational Rehabilitation or Independent Living application process, this is opposed to a referral which is getting information on the available programs.

When entering a new record, the user must select whether the record is for a Client or a Referral. The system will default to **"No"** (meaning the default entry is as a Referral).

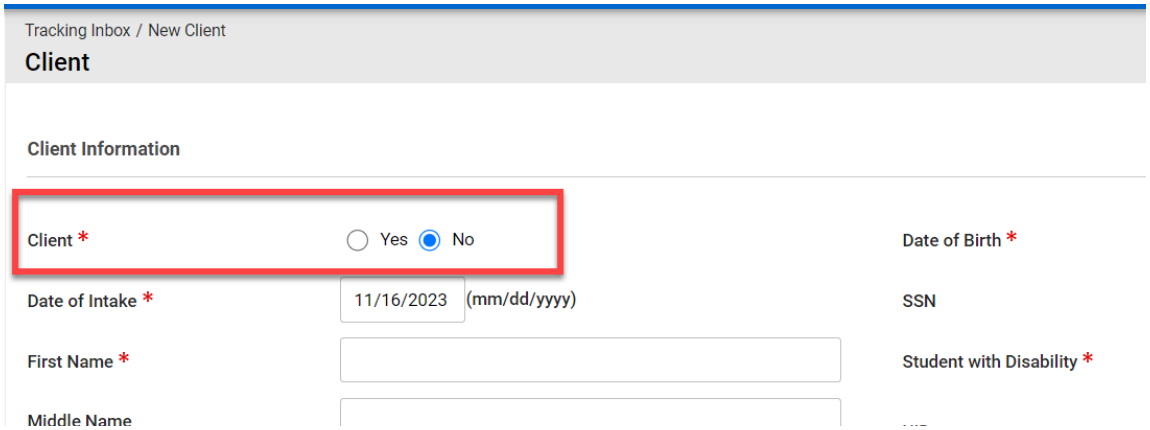


Figure 3-2 Client Form; Client = No

If the record is being entered for a **Referral**, the "Physical Address" is not included, only the "Mailing Address" is required as part of the referral information.

Referral:

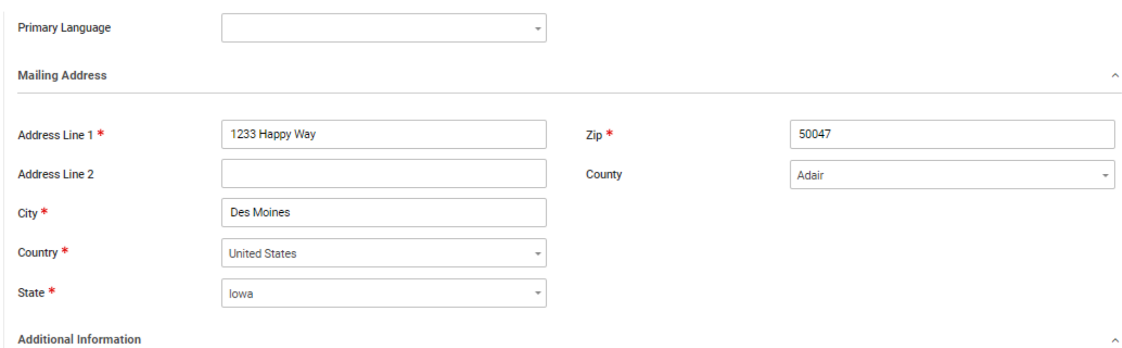


Figure 3-3 Client Form Address Fields

Client:

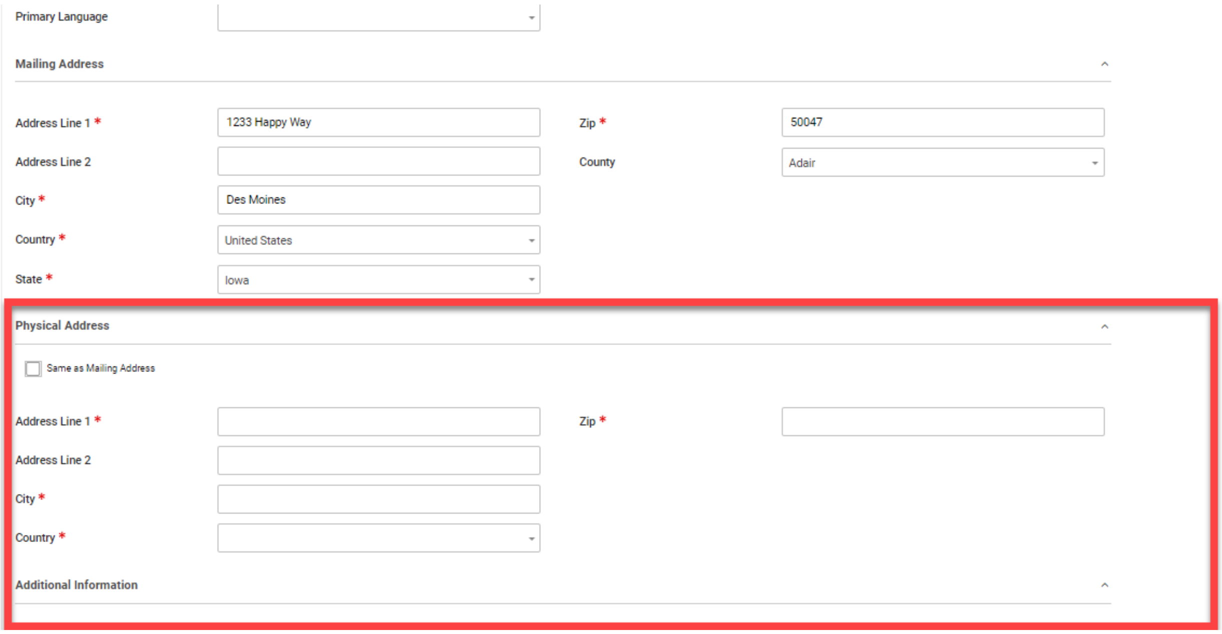


Figure 3-4 Client Form Address Fields; Physical Address

If the record is being entered as a **Client**, then fields that are optional for a Referral will become required for a **Client.**

3.2 Converting a Referral to a Client Record

Referrals can be converted to a Client Record.

1. Navigate to the Referral record to be converted to a client. Do this either through the **Tracking Inbox** if the same user who created the referral will be doing the converting OR through the **Search** > **Client**.

2. For this example the **Left Menu Search** > **Standard Search** > **Client** is used.

3. The **Search Results** will display, locate the **client**, and **double click their record**.

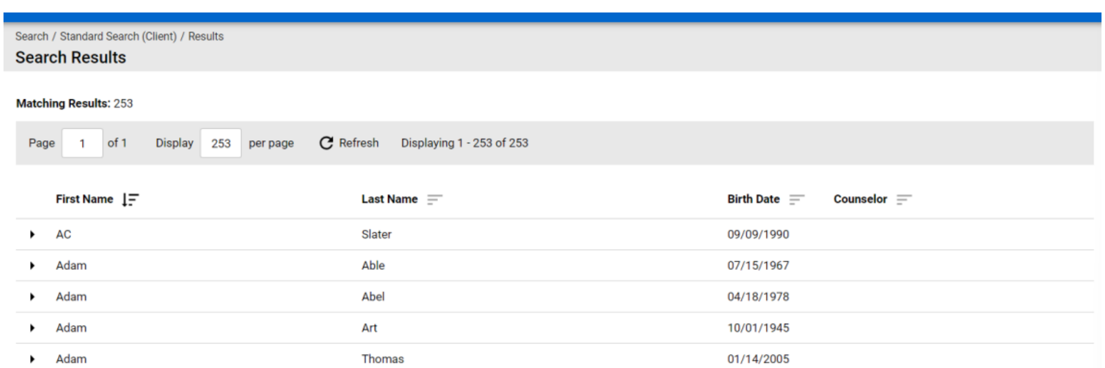


Figure 3-5 Standard Search for Client; Results

4. The client record will display.

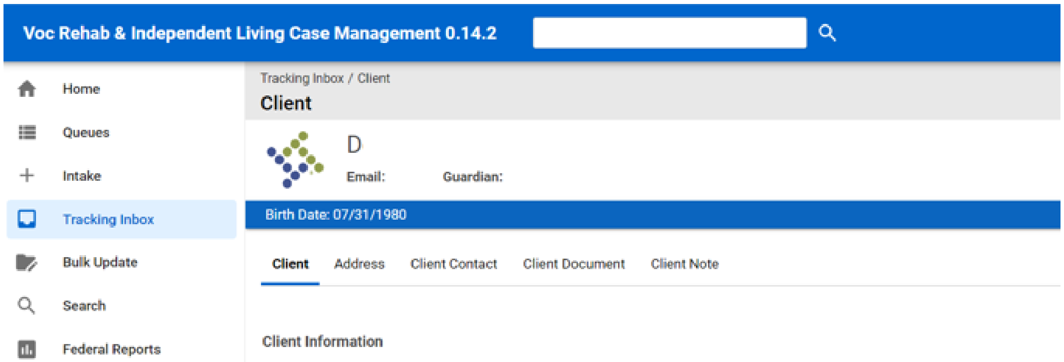


Figure 3-6 Client Record Displayed

5. To convert the record from a Referral to a Client click the **Convert to Client** button located under the **Client Information** header.

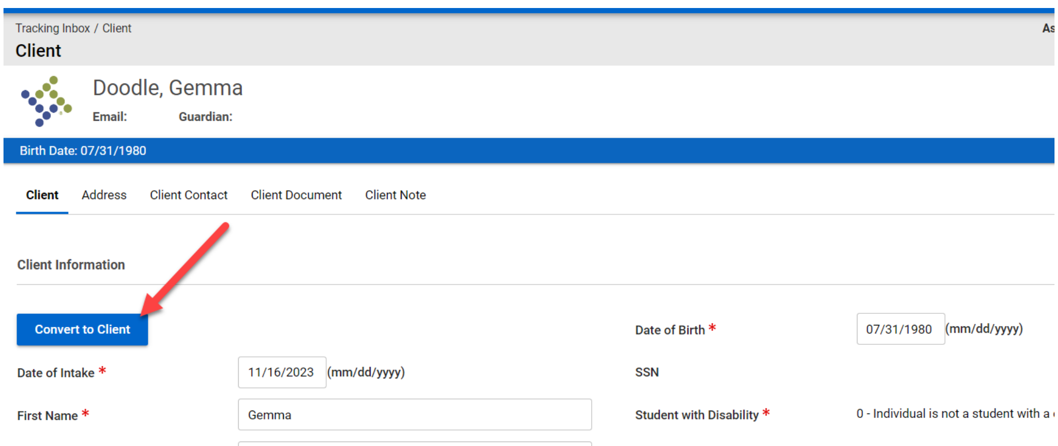


Figure 3-7 Convert to Client Button

Note: Social Security Number is required to be entered for all clients, not referrals. If the social security number does not need to be collected for a specific program type 999-99-9999 can be entered. A Workflow Message will display stating the SSN is required to convert to client; this is not an error, just informational but, a requirement.

On taking this action any fields that are now required must be entered before the Client record can be saved, otherwise validation errors will display.

6. Once the referral has been converted to a client there are additional fields that are required to be filled out. Fill out all required fields and click **Save**.

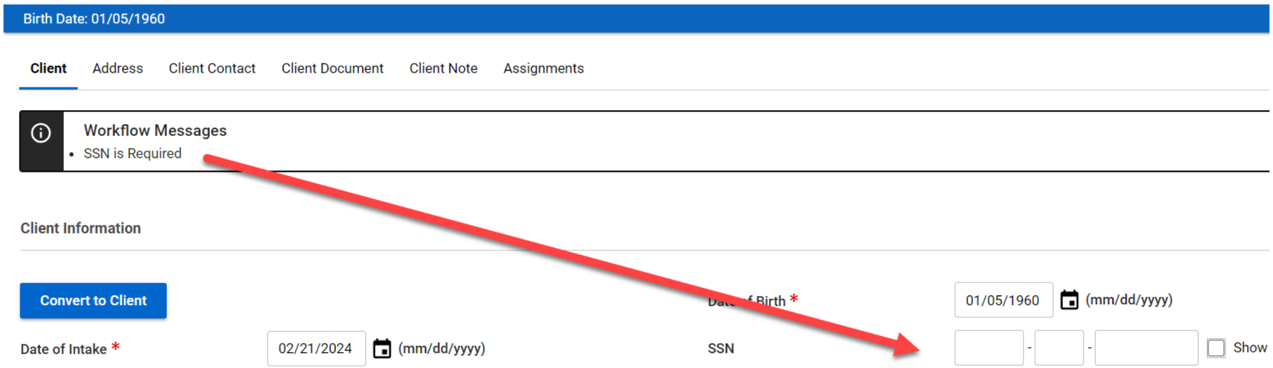


Figure 3-8 SSN Required to Convert to Client

7. Additional tabs will now display at the top of the screen. These are Client, Program, Address, Client Contact, Education, Client Document and Client Note.

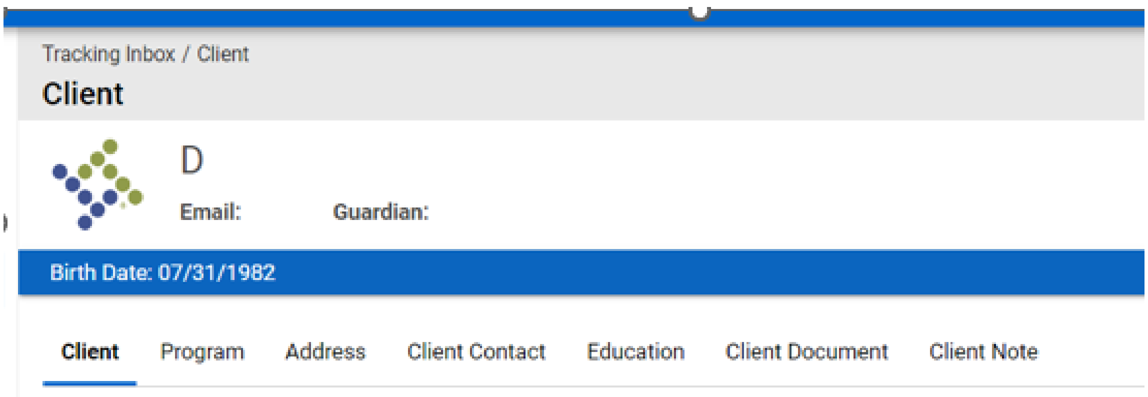


Figure 3-9 Additional Tabs Displayed on Client Form

8. Client has been created.

3.3 Client Address

Client Address is used to store addresses related to the Client record.

Business Rules

- Mailing and Physical addresses entered on the Client tab are automatically added to the Client Address tab
- Clients require both a Mailing and Physical Address.
- Referrals require a Mailing address only. Others are optional.

1. Navigate to the client record and click **Address** in the top bar.

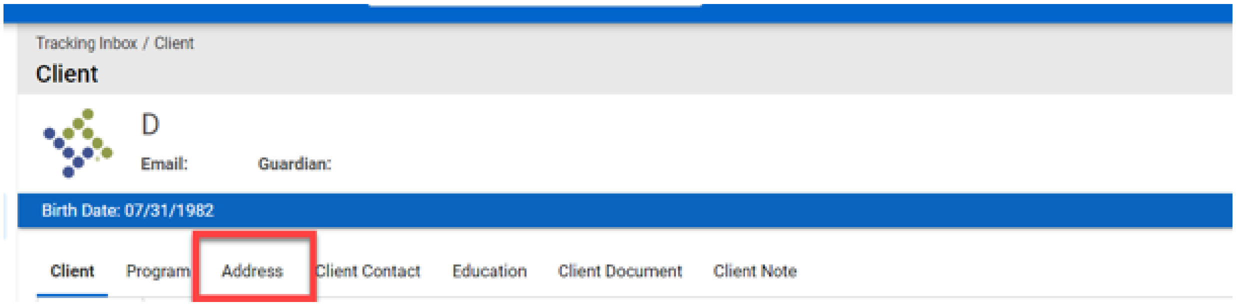


Figure 3-10 Client Address Tab

2. The addresses that were entered on the **Client Intake** form will be listed in the **Address Listing** screen. Additional addresses can be added by clicking **+New**.

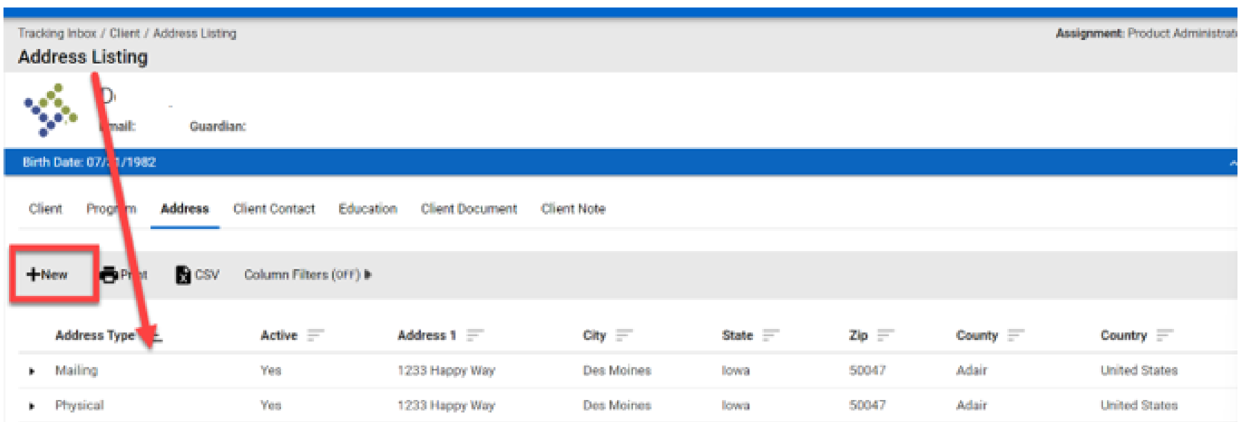


Figure 3-11 Client Address Listing

Note: At least one mailing and physical address must be Active = Yes for a client.

For a referral ONLY the mailing address must Active = Yes.

3.4 Client Contact

The **Client Contact** tab allows users to capture basic contact information for any additional contacts related to the Client record.

1. Navigate to the client record and click **Client Contact** in the top bar.

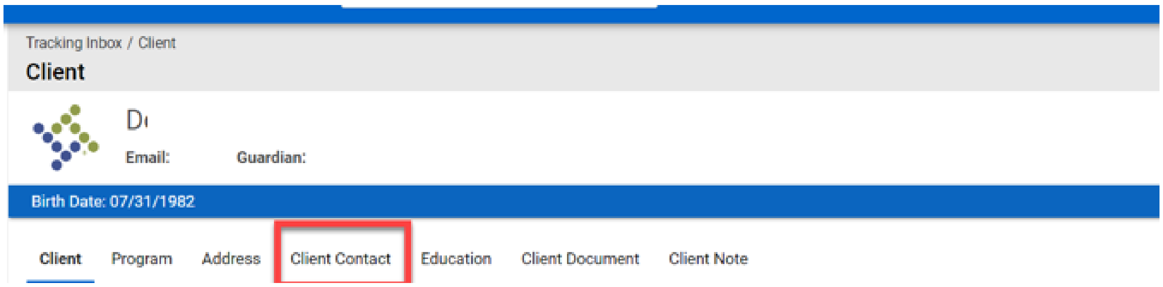


Figure 3-12 Client Contact Tab

2. The Client Contact Listing will display.
3. To add new contacts for a client click **+New**.

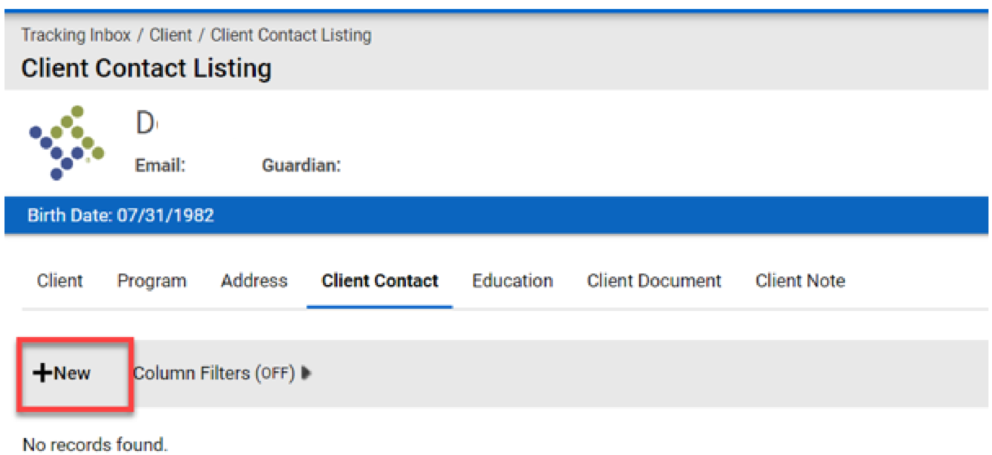


Figure 3-13 Client Contact; +New

4. The **Client Contact** form will display. Enter the required information and click **Save**.
5. The **Client Contact Listing** will display the contacts associated with the client.

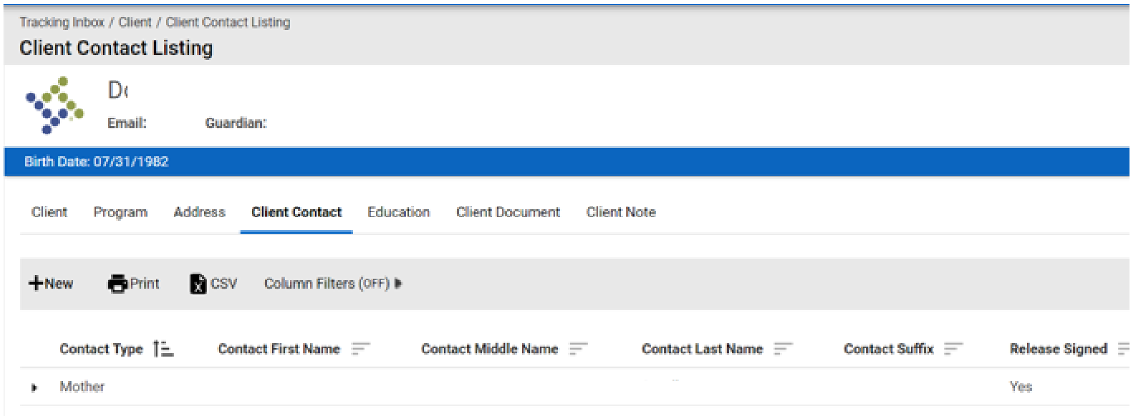


Figure 3-14 Client Contact Listing

6. To view or modify the contact record, double click.

3.5 Client Education

Education Records can be created for each client. The Education Record contains information related to the education attained by the client.

Note: The tab is only available for Clients, it is not available for a Referral.

1. Navigate to the client record and click **Education** in the top bar.

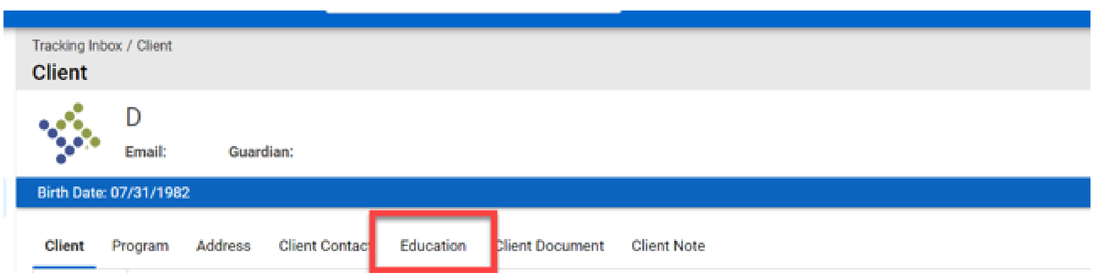


Figure 3-15 Client Education Tab

2. The **Education Listing** will display. To enter an education record click **+New**.

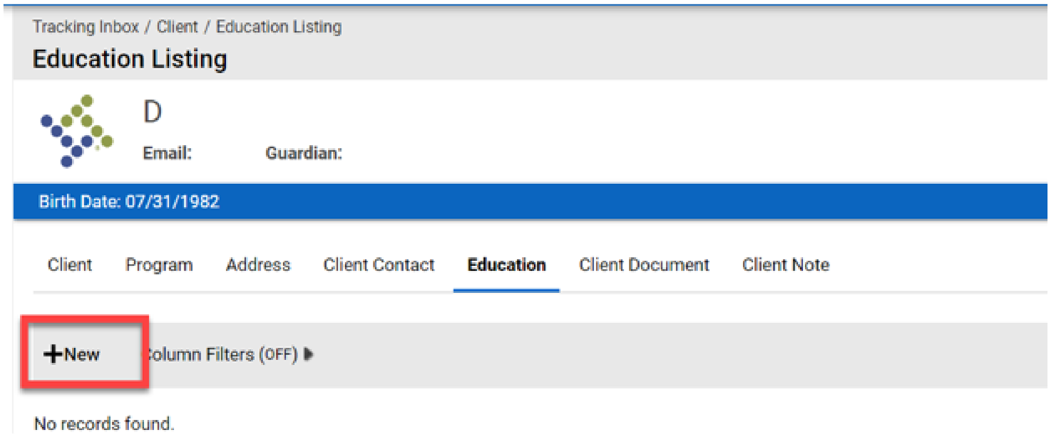


Figure 3-16 Client Education Listing; +New

3. The Education form will display. Enter the required information and any additional information needed for the client.

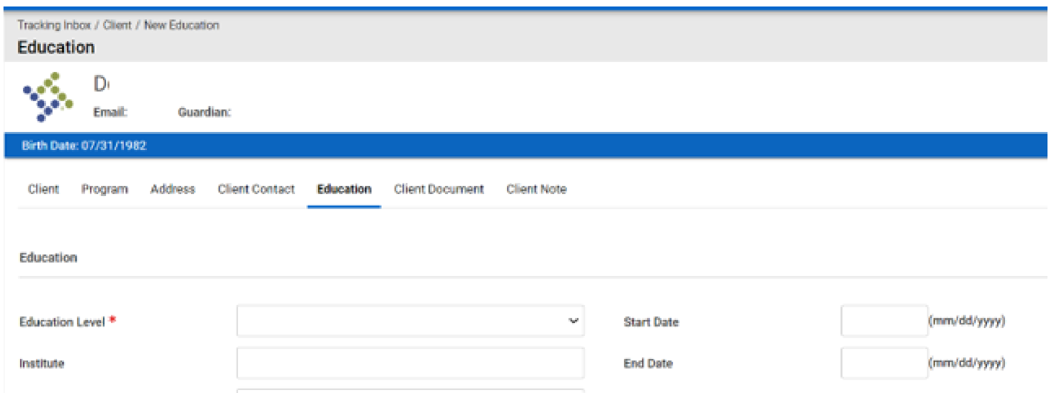


Figure 3-17 Client Education Form

4. Upon save the education will be listed within the Education Listing. To access the record double click it.

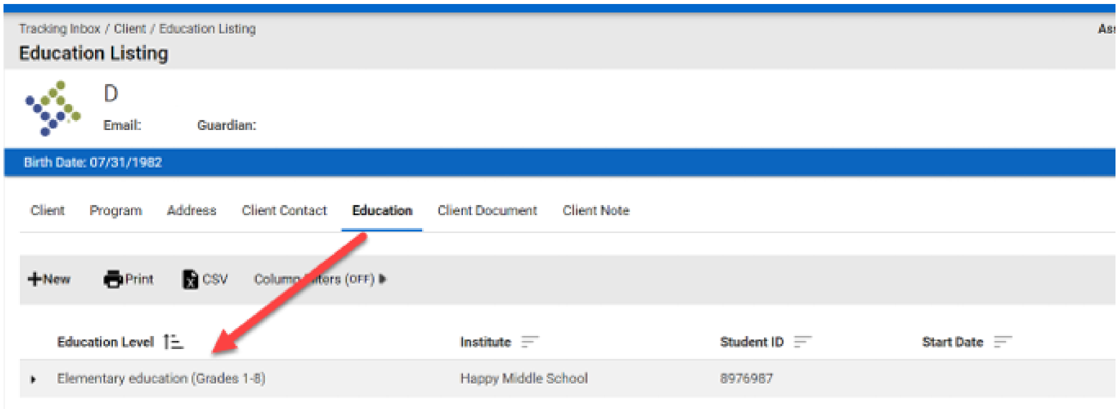


Figure 3-18 Client Education Listing

3.6 Client Document

The Client Document tab allows users to upload and store documents that are associated with a specific Client record. Users are able to add one or more documents to a Client Record.

1. Navigate to the client record and click **Client Document** in the top bar.

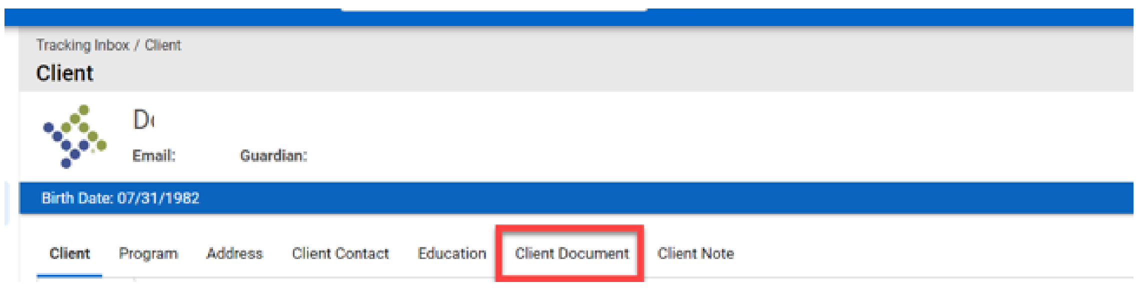


Figure 3-19 Client Document Tab

2. The Client Document Listing will display.

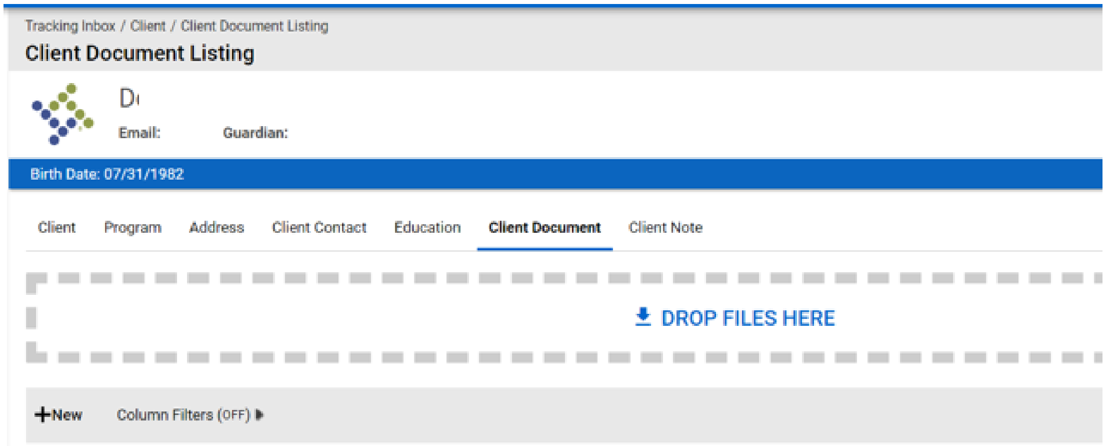


Figure 3-20 Client Document Listing

3. There are two ways to upload documents:

A) Open your files and simply drag and drop the file in the **'Drop Files Here'** box that is located next to a flat line with an arrow pointing down, above it. This will populate required fields behind the scenes for the user.

Note: Ensure document is titled in a way that would be needed when searching in the future if using the drag and drop option as the system will title the document with whatever the file name is.

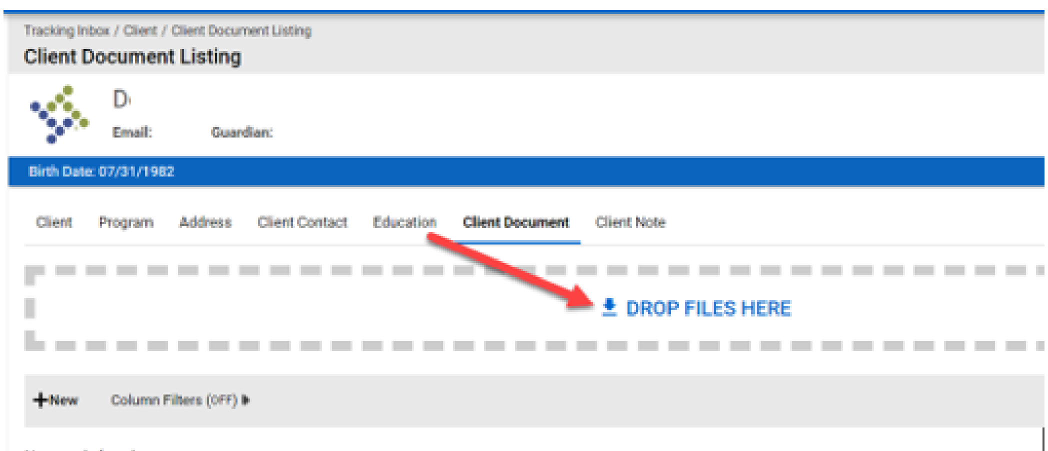


Figure 3-21 Client Document Upload; Drop Files

B) Click directly on the **'Drop Files Here'** which will open a **Client Document** form. This requires the user to fill in the required fields.

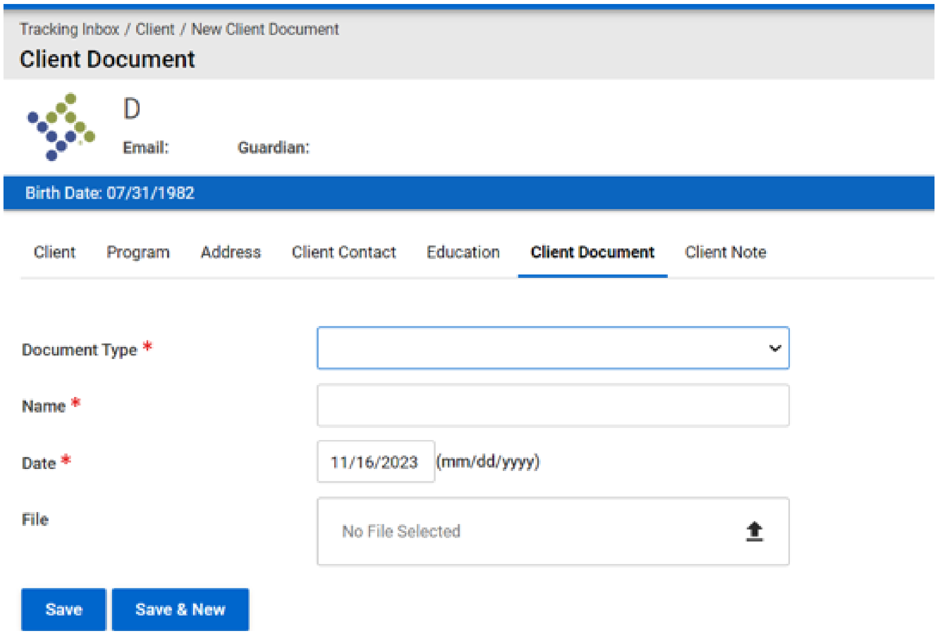


Figure 3-22 Client Document; File Upload

4. The documents will display on the **Client Document Listing**.

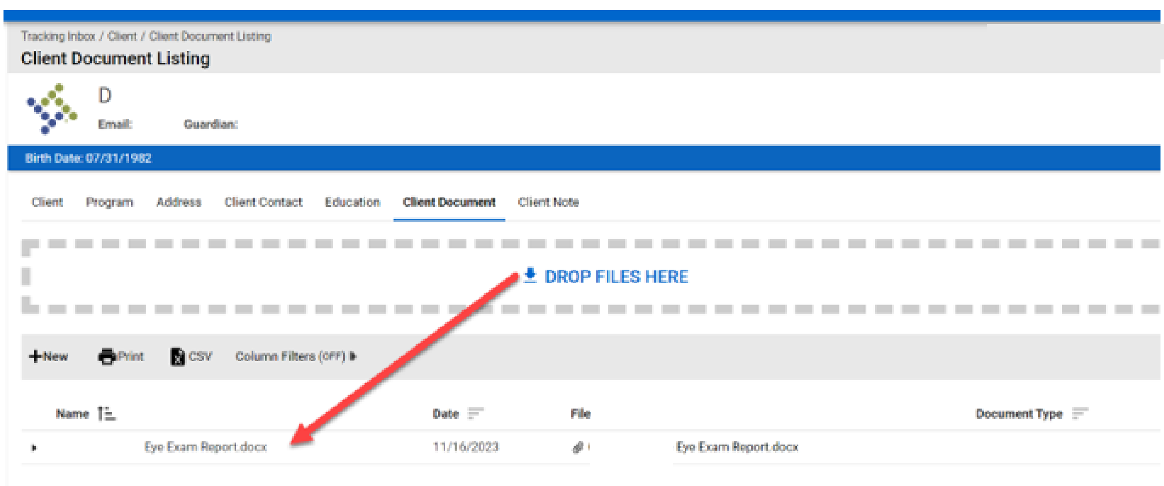


Figure 3-23 Client Document Listing

3.7 Client Note

The Client Note tab allows users to add notes that are associated with a specific Client record. Client Notes are available for anybody to see if they have access to that Client record.

1. Navigate to the client record and click **Client Note** in the top bar.

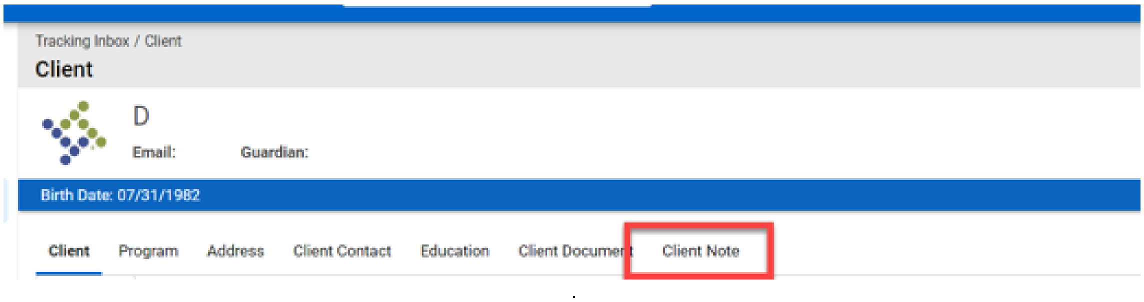


Figure 3-24 Client Note Tab

2. The **Client Note Listing** will display.

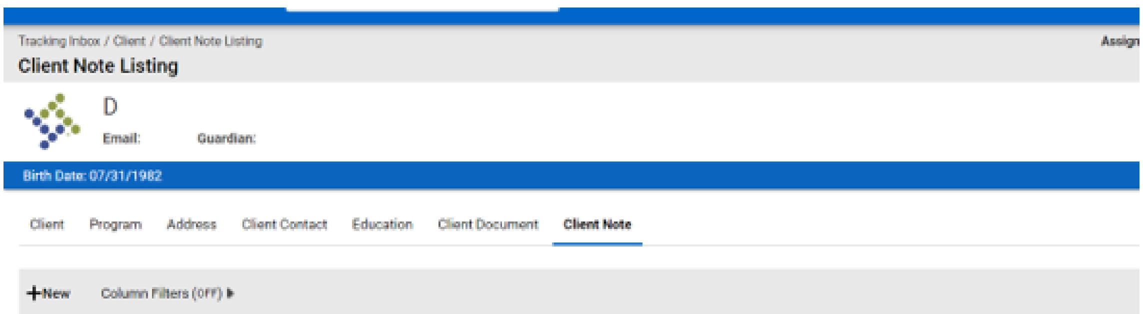


Figure 3-25 Client Note Listing

3. To add a new note click **+New**.

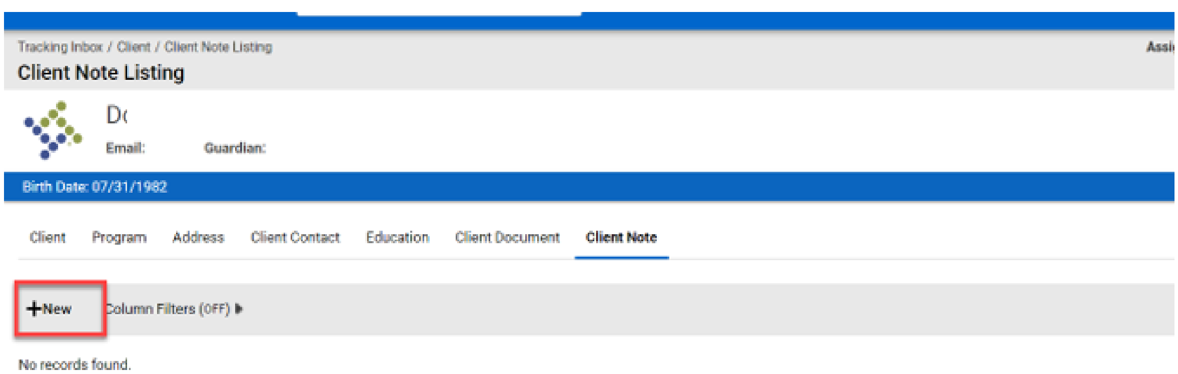


Figure 3-26 Client Note Listing; +New

4. The **Client Note** form will display. Fill in the required information and click **Save**.

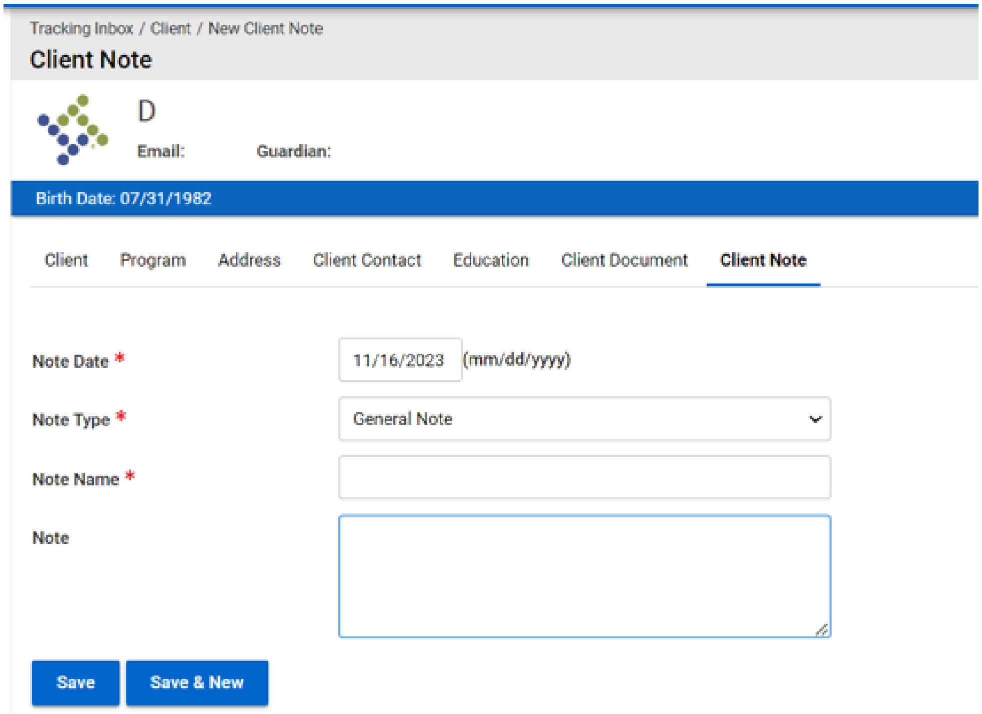


Figure 3-27 Client Note Form

5. The **Client Note** will display in the **Client Note Listing**.

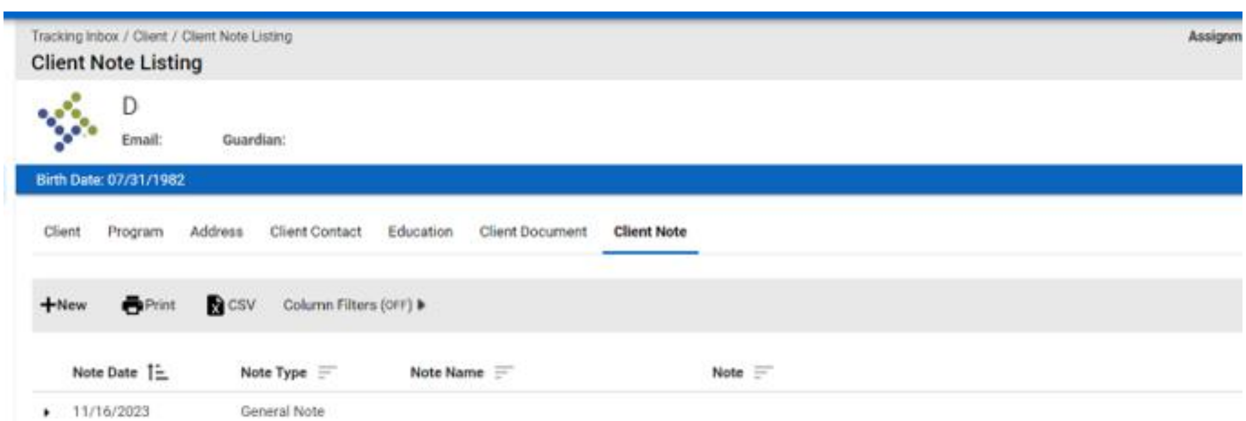


Figure 3-28 Client Note Listing

4 Program

4.1 Program Workflow

The Program workflow is designed to help guide the user through the Vocational Rehabilitation and Independent Living application process from beginning to end. Events have been implemented with business rules to help the user in making sure all required information is captured before they are able to move on to the next step in the vocational rehabilitation process. Workflow messages have been setup to assist the user through the workflow.

4.1.1 Workflow Status View

Click on the Workflow icon in the top right of the screen to display the workflow status view.

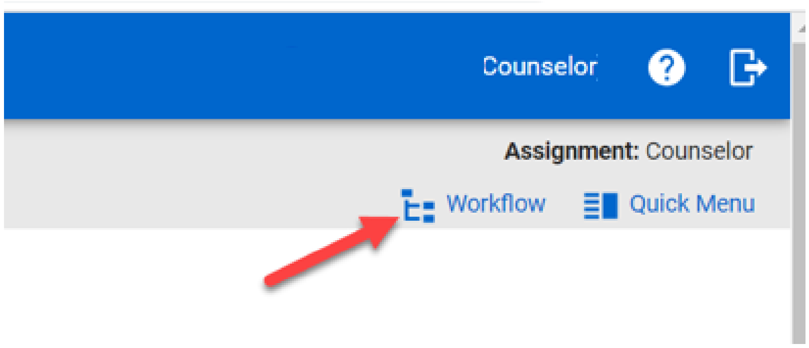


Figure 4-1 Workflow Status View Icon

The different statuses and events that a Program record can potentially go through from the time a Vocational Rehabilitation application is submitted until it's closed are shown below.

Note: Not all programs will go through each step in this workflow.

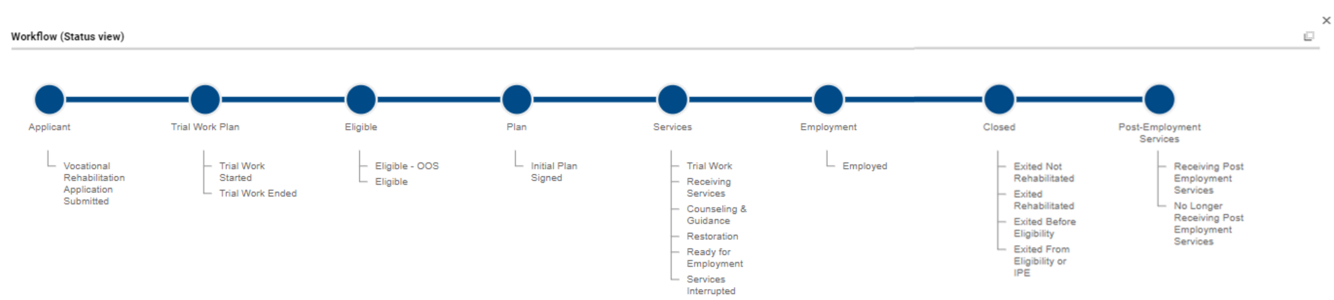


Figure 4-2 Workflow View

The blue dot represents where in the workflow the Program record has been and the green dot represents to the user where the Program record currently is in the process.

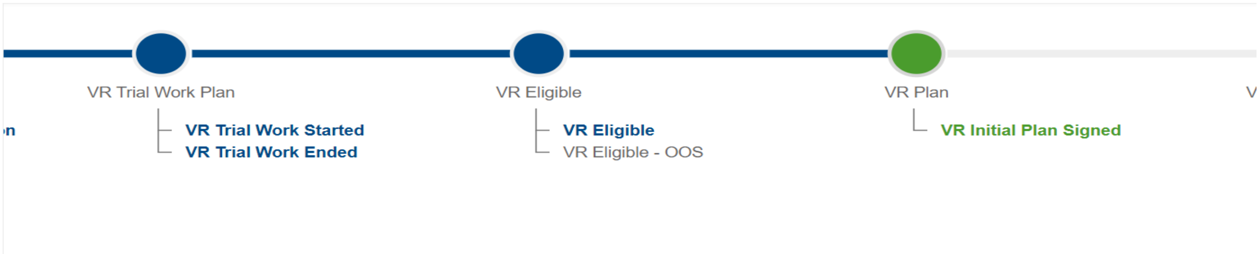


Figure 4-3 Workflow View; Status

4.2 Program

The Program tab (application) allows users to capture program specific information which is used to supply data for federal reporting.

Business Rules

- A Client can only have one program of the same Program Type open at a time.
- State filters off the Program selected.
- County of Application filters based off the Program and State selected.
- Office filters based off the Program, State and County of Application selected.
- Fields on the Program Form vary based on the type of program selected (Potentially Eligible, Vocational Rehabilitation, Independent Living Younger Blind, or Independent Living Older Blind)

4.3 Creating a Program

1. Navigate to the client record and click **Program** in the top bar.

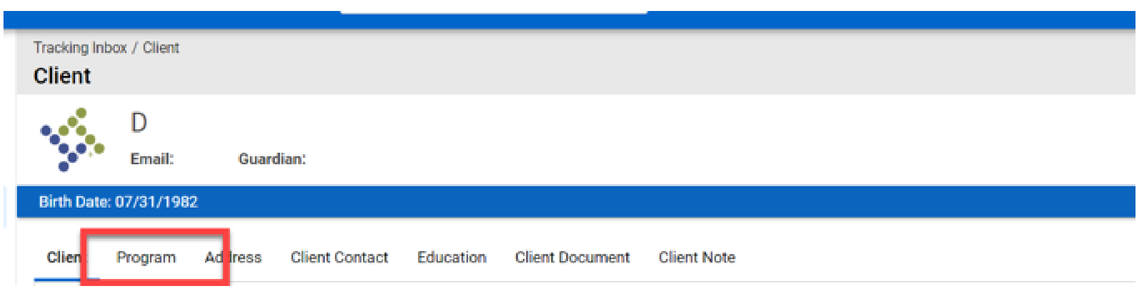


Figure 4-4 Program Tab

2. The **Program Listing** will display.

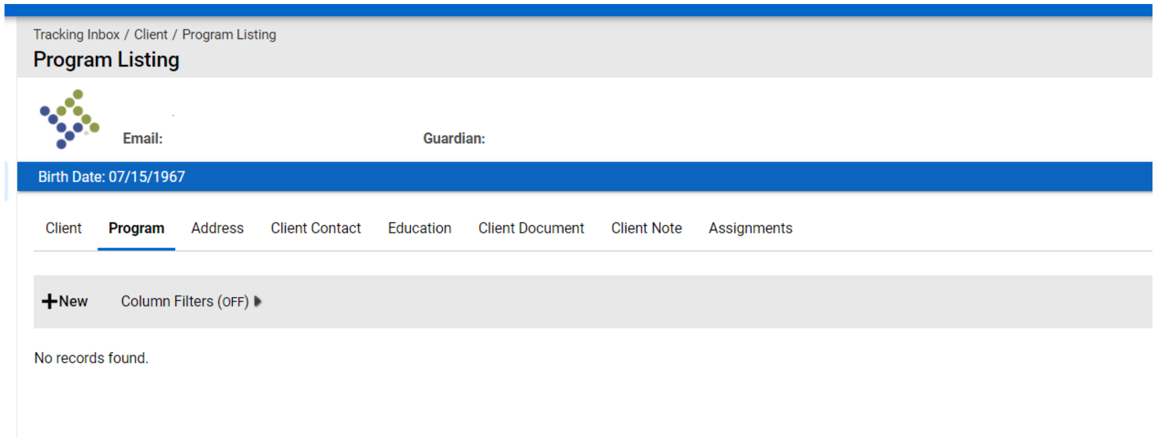


Figure 4-5 Program Listing

3. To add a new Program click **+New**.

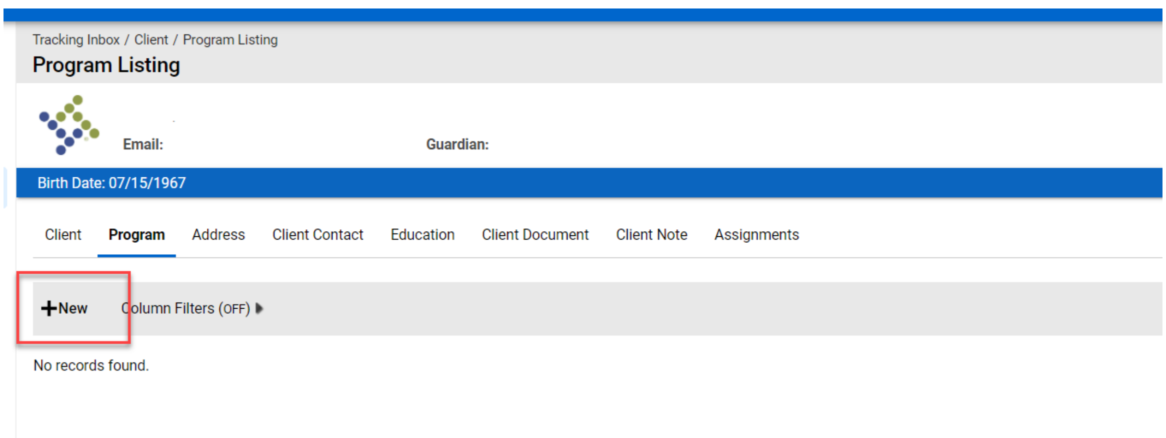


Figure 4-6 Adding a New Program; +New

Note: The Program can also be created by hovering over Program until the New Program displays; click this and the same program form will display. Both forms are exactly the same regardless of navigation.

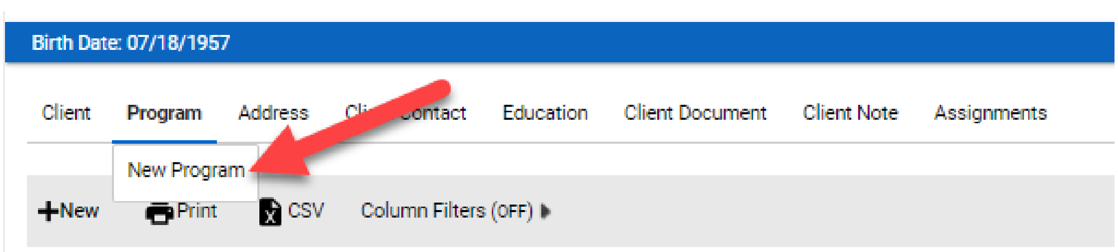


Figure 4-7 Adding a New Program; New Program Tab Function

4. The initial **Program** form will display.

- The programs available will be based off a calculation of the client's birth date.
  - Potentially Eligible is only an available option if the client's birthday falls within an appropriate age (Age must = <22).
  - If a client is 22+ Vocational Rehabilitation, Independent Living Younger Blind and Independent Living Older Blind program types become available.

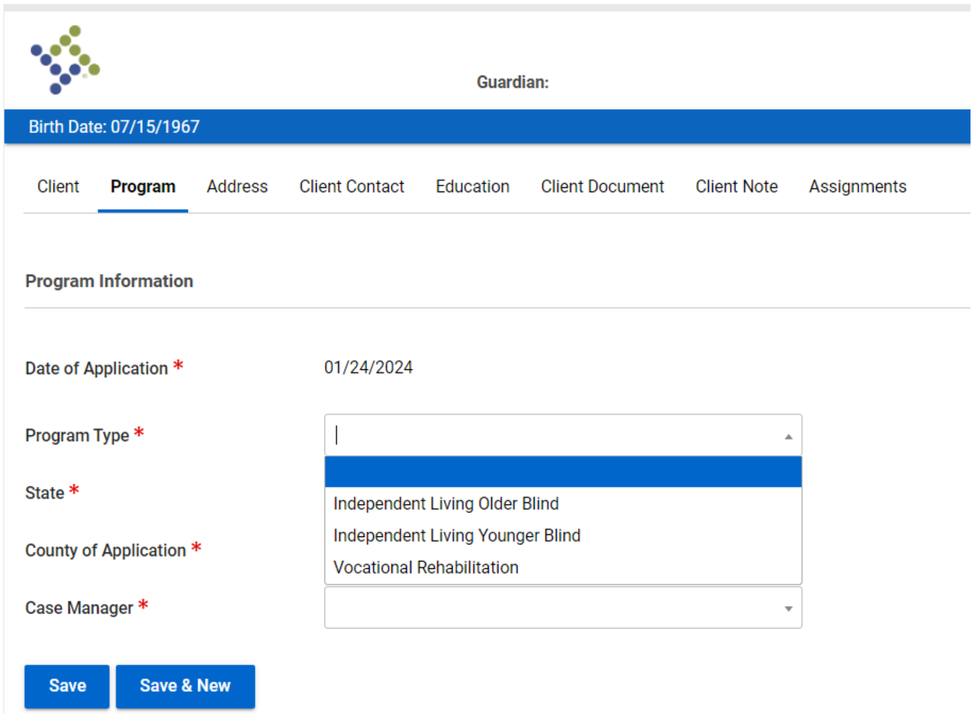


Figure 4-8 Program Type Drop-Down

Once the program is selected the form will expand and display all fields that are applicable to the specific program type.

5. The **Program Information** form will display.

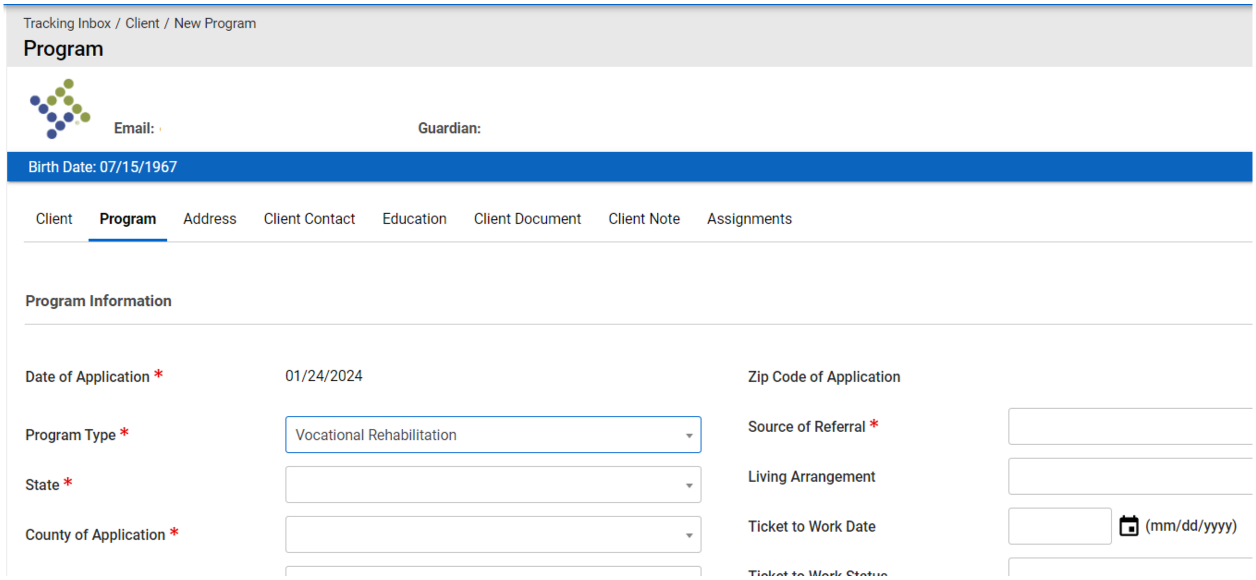


Figure 4-9 Program Form

The blue banner at the top of the screen will now display where the client is at any given time within their program and what the last event that has occurred is:

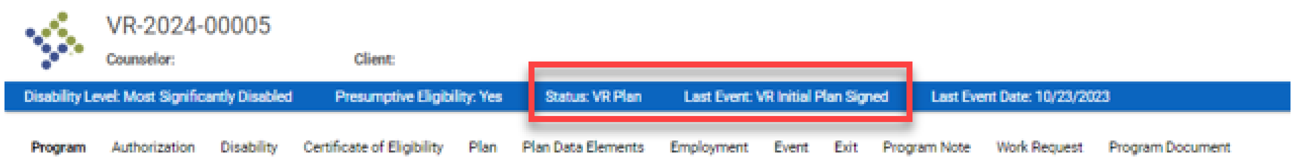


Figure 4-10 'Program Status' and 'Last Event' Status

The **Benefit/Disability Information** section requires different values and are determined by the program type that was selected:

Vocational Rehabilitation

- 'What is Your Disability?' - This is a free text field and the user can enter any information
- 'What is the Cause of Your Disability?' - This is a free text field and the user can enter any information

Independent Living Younger Blind

- Primary Disability - Single select drop down
- Primary Cause Source - Single select drop down
- Secondary Disability - Single select drop down
- Secondary Cause/Source - Single select drop down

Independent Living Older Blind

- Primary Disability - Single select drop down
- Primary Cause/Source - Single select drop down
- Age Related Impairment - Single select drop down

The **Support, Monthly Public Support and Medical Insurance** sections requires different values and are determined by the program type that was selected:

Vocational Rehabilitation

- SSI Due to Blindness - yes/no
- SSDI Due to Blindness - yes/no
- Monthly Public Support at application - multi select
- Medical Insurance - multi select

Independent Living Younger Blind

- Monthly Public Support at application - multi select

Independent Living Older Blind

- Monthly Public Support at application - multi select

6. Fill in the required fields and click **Save**.

7. Additional tabs now display along the top of the **Program** form and some fields have become read only. The client's program has been created.

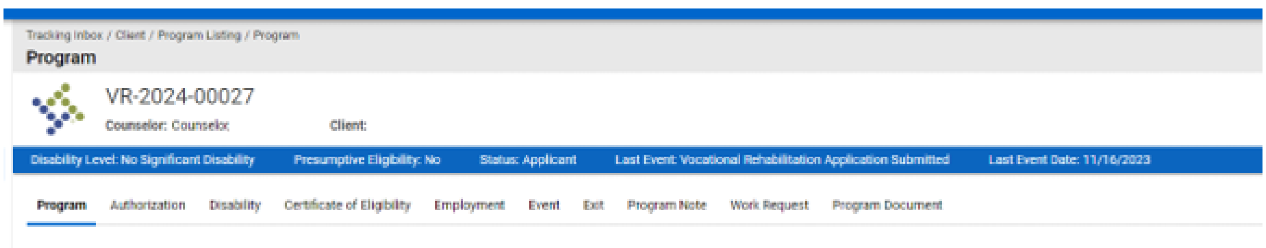


Figure 4-11 Vocational Rehabilitation Tab Order

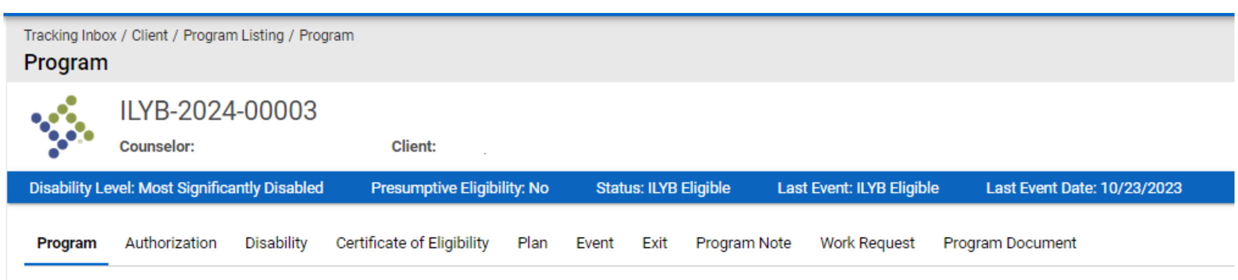


Figure 4-12 Independent Living Tab Order

Note: If program type = Independent Living Younger Blind or Independent Living Older Blind the Employment tab does not display

4.4 Program Note

Once a program has been created the Program Note becomes available. The Program Note tab allows users to add notes specific to a Program.

1. Navigate to the client's program and click on the **Program Note** tab in the top ribbon.

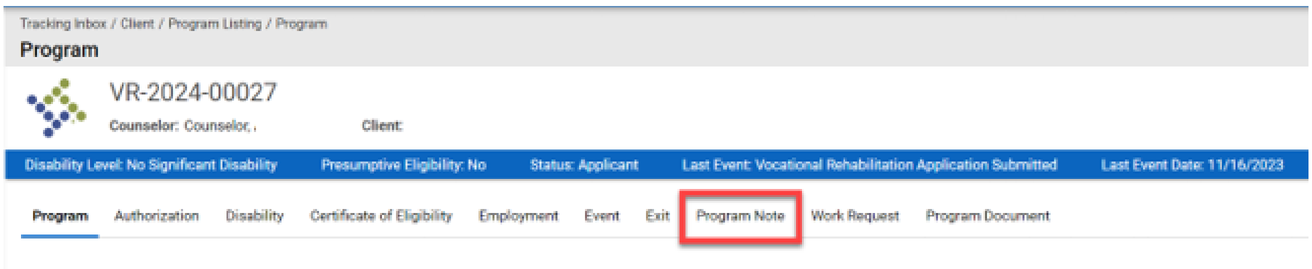


Figure 4-13 Program Note Tab

2. The **Program Note Listing** will display, click **+New** near the top of the form.

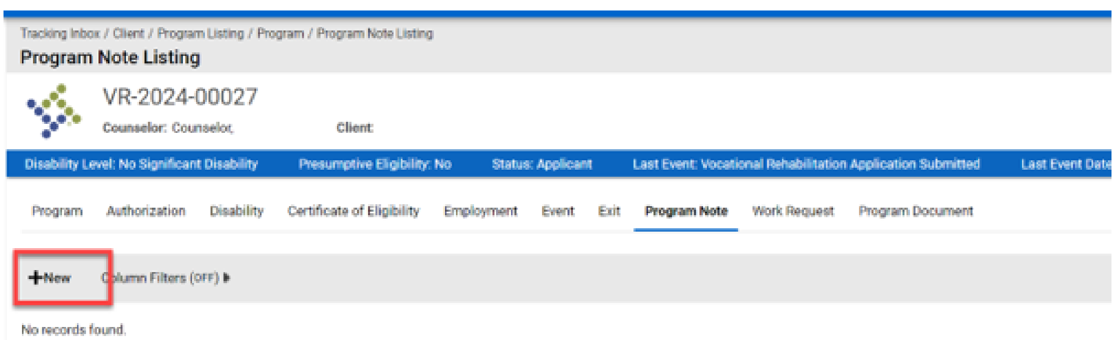


Figure 4-14 Program Note Listing; +New

3. The Program Note form will display.

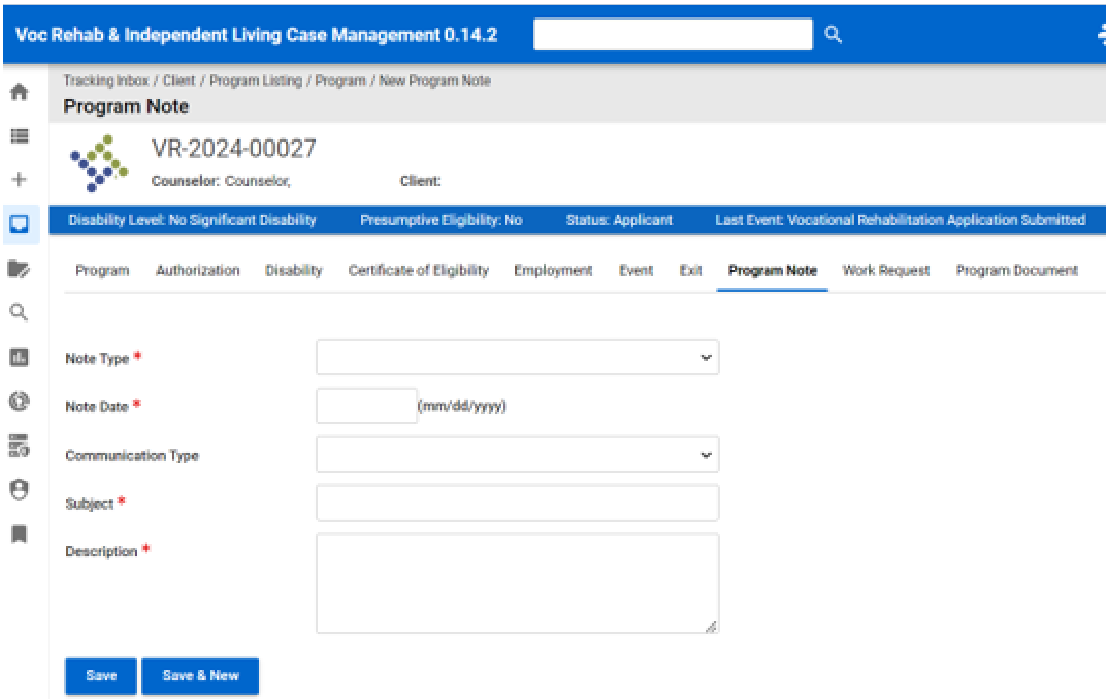


Figure 4-15 Program Note Form

4. Enter in the **Note Type**; there are multiple Note Types available depending on what type of Note is being entered:

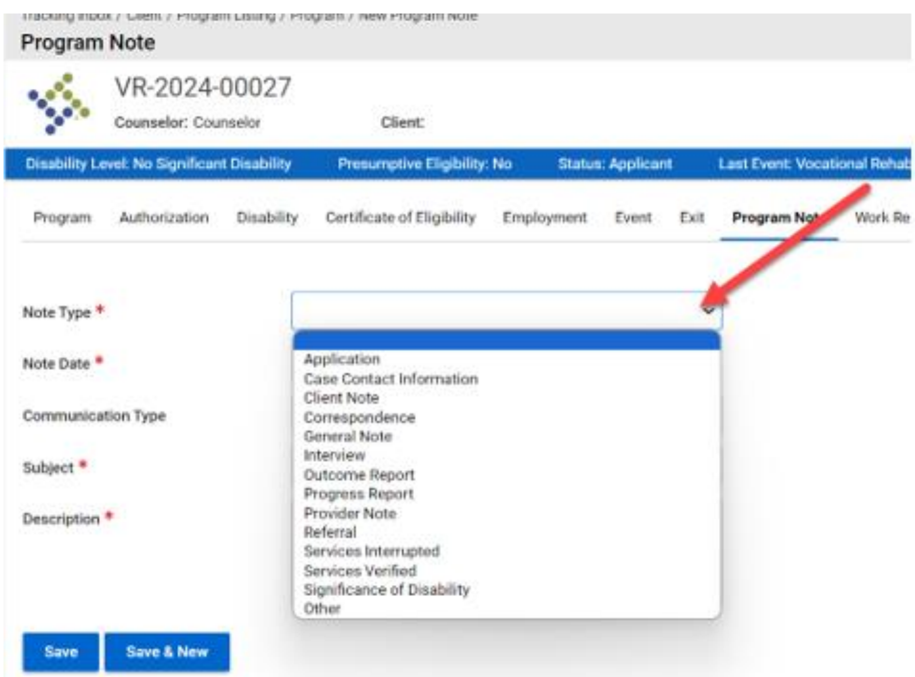


Figure 4-16 Program Note Types

Note: When services are entered on a plan the initial Program Note of 'Services Verified' and the checkbox for 'Use for Initial Start Date' need to be completed.

5. Continue filling out the form, entering all required fields and click **Save**.
6. The note will be saved. In the breadcrumbs near the top of the screen click **Program Note Listing**.

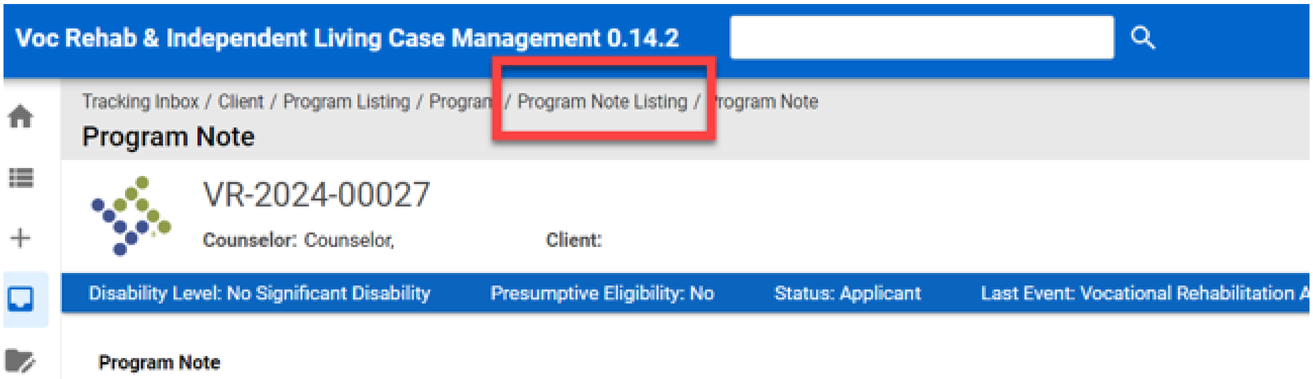


Figure 4-17 Breadcrumbs > Program Note Listing

7. This will navigate you back to the **Program Note Listing** page and all **Program Notes** for this client will display here:

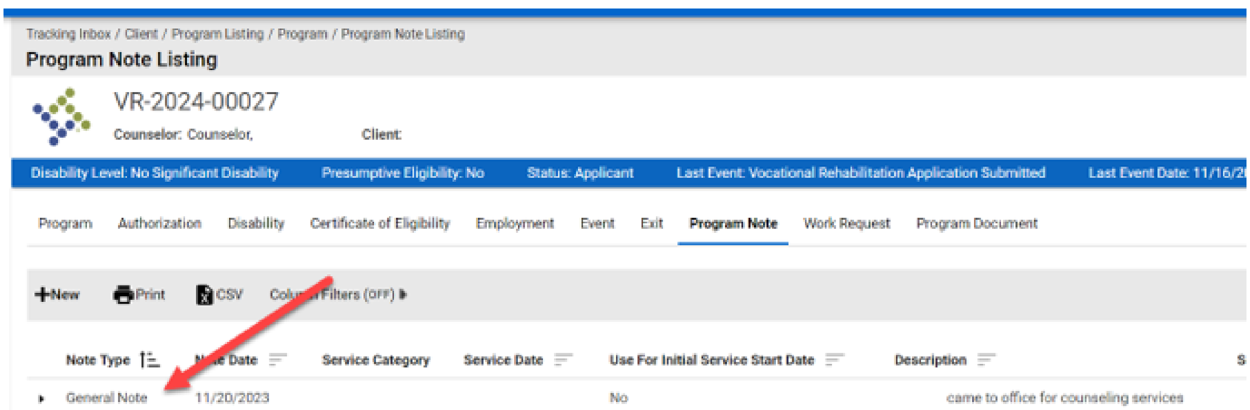


Figure 4-18 Program Note Listing

4.5 Program Document

1. Navigate to the client's program and click on the **Program Document** tab in the top ribbon. The Program Document tab allows users to upload and store documents that are associated with a specific Program record.

- Users can choose from different types of documents to upload.
- Users are also able to select 'New' and upload files to add additional program documents.

Business Rules

- When the system generates letters automatically, they are added to the 'Program Document' listing and shown as 'Letter Generation' document types.
- The following 'Document Types' are available in the drop-down:
  - Consent Form (for Potentially Eligible program type)
  - Client Response Form - standard file upload
  - Letter Generation - allows for the selection of preconfigured letter templates in the system which the user can edit using CKEditor
  - Supporting Documentation - standard file upload
  - Eye Report - standard file upload

1. From the tab listing click on **Program Document**.

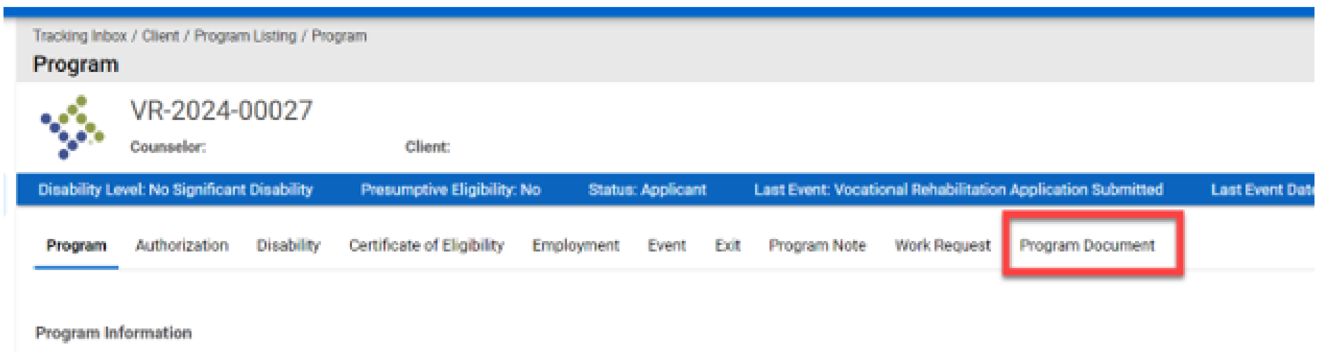


Figure 4-19 Program Document Tab

2. This will display the Program Document Listing, click **+New** to enter a new Program Document for this client.

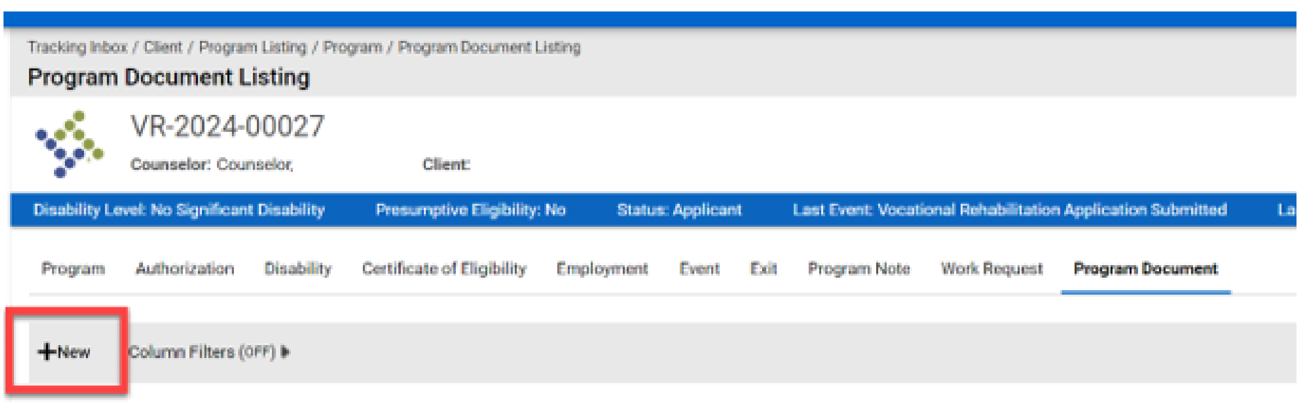


Figure 4-20 Program Document Listing; +New

3. The **Program Document** form will display.

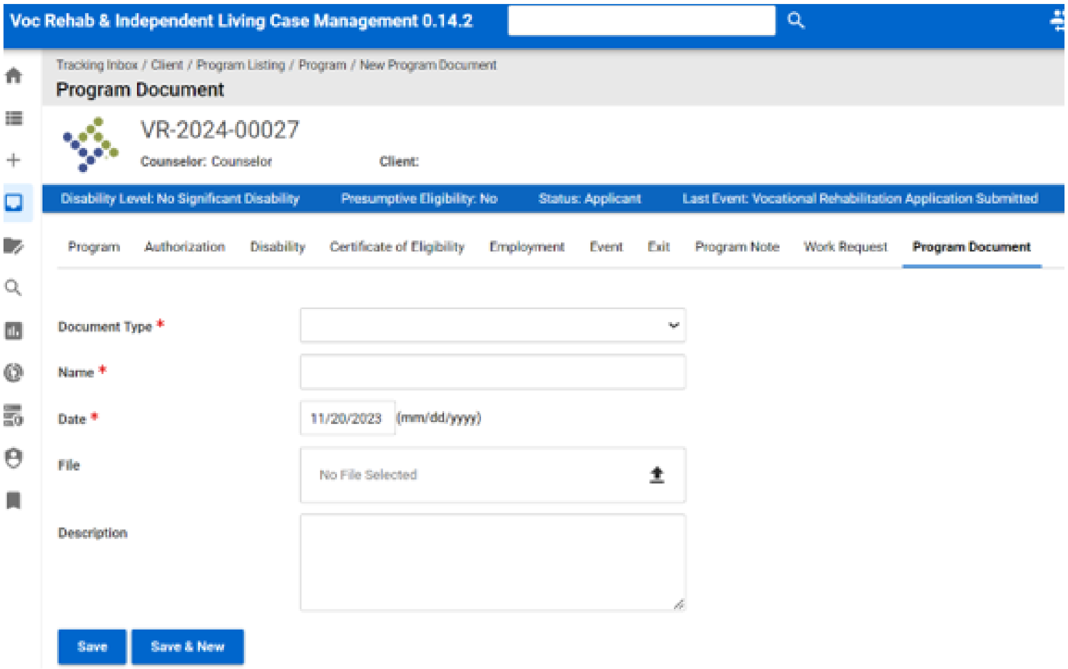


Figure 4-21 Program Document Form File Upload

4. Populate the required fields and click **Save**.

In the **Document Type** there is a **Letter Generation** option:

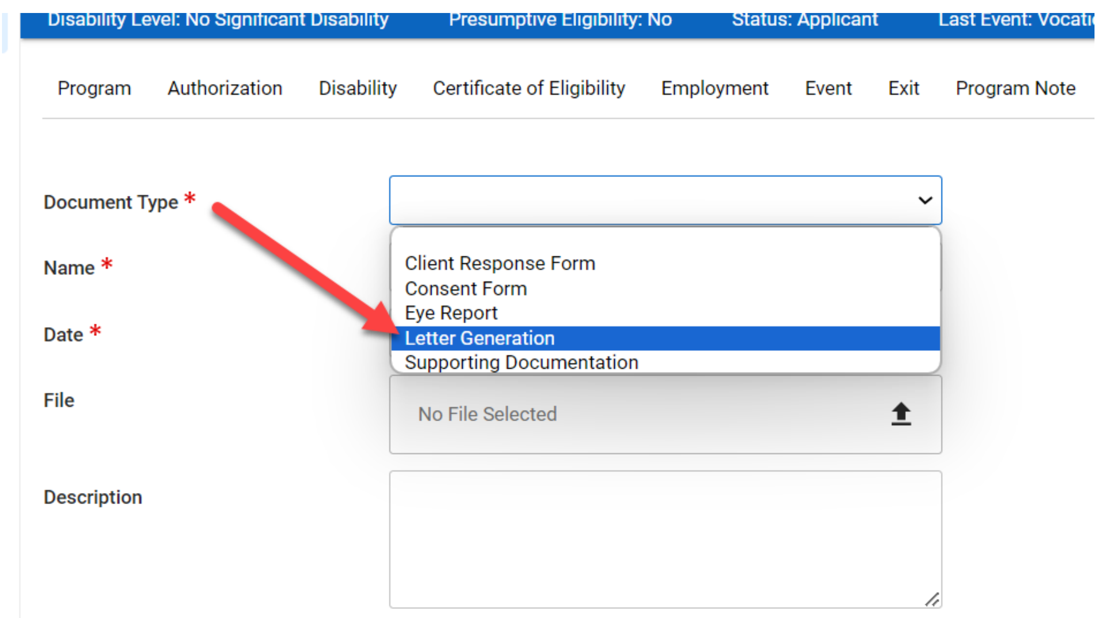


Figure 4-22 Document Type > Letter Generation

When this is selected the screen will change and will provide the user with different letter options; these are templates that will auto populate and can be edited within the **Content** section.

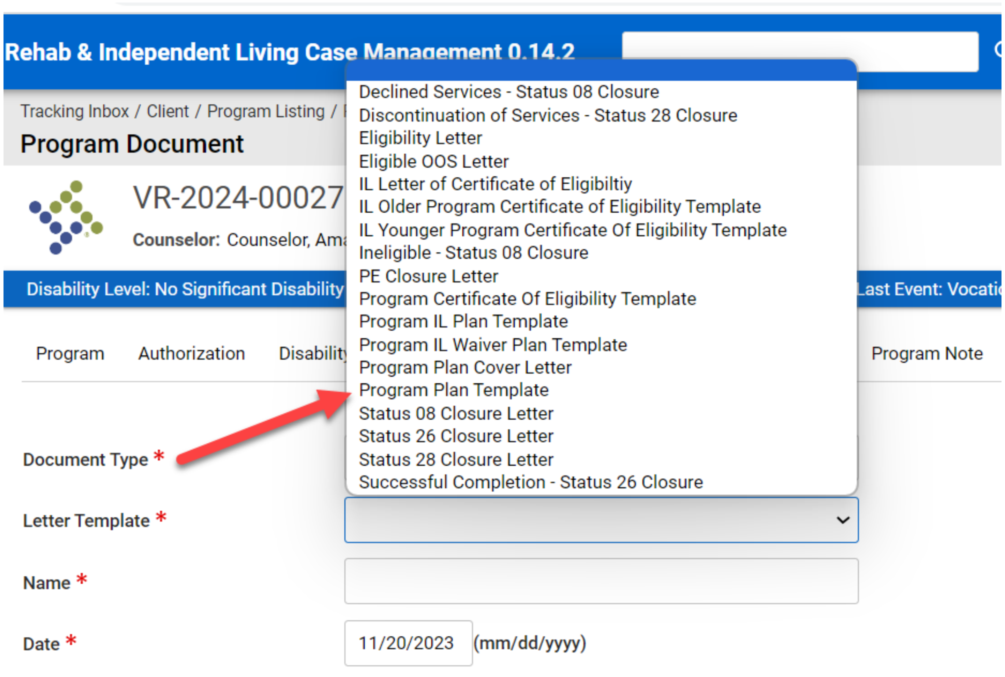


Figure 4-23 Letter Template Options

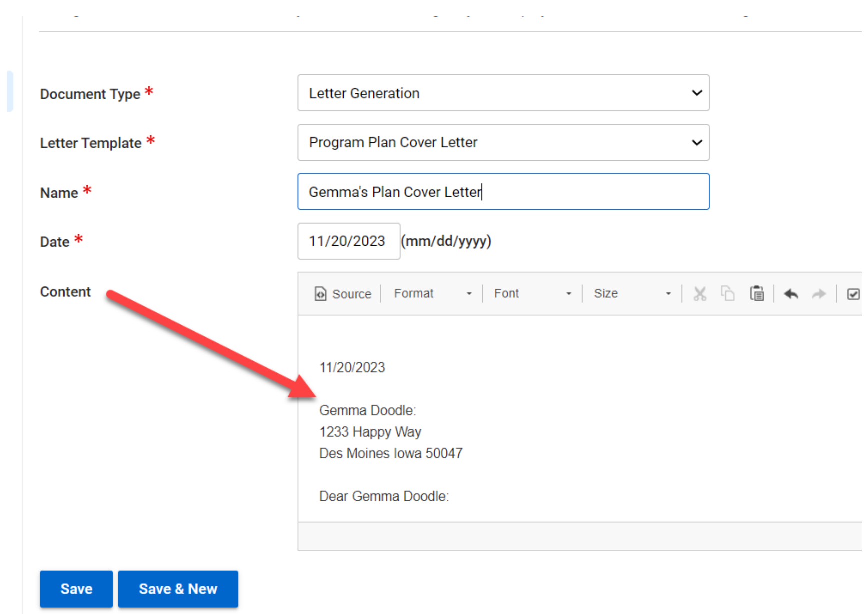


Figure 4-24 Letter Template Form

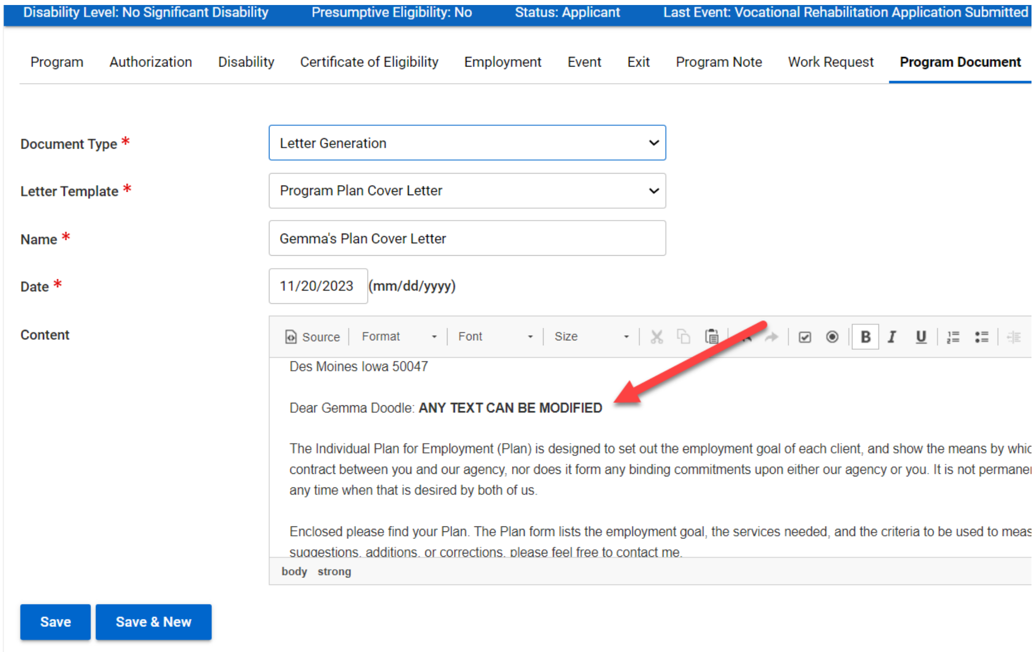


Figure 4-25 Letter Template Form; Text Can Be Modified

5. Upon save of the **Program Document** the system will navigate back to the **Program Document Listing**. Here all the documents that have been uploaded or generated for the client will display.

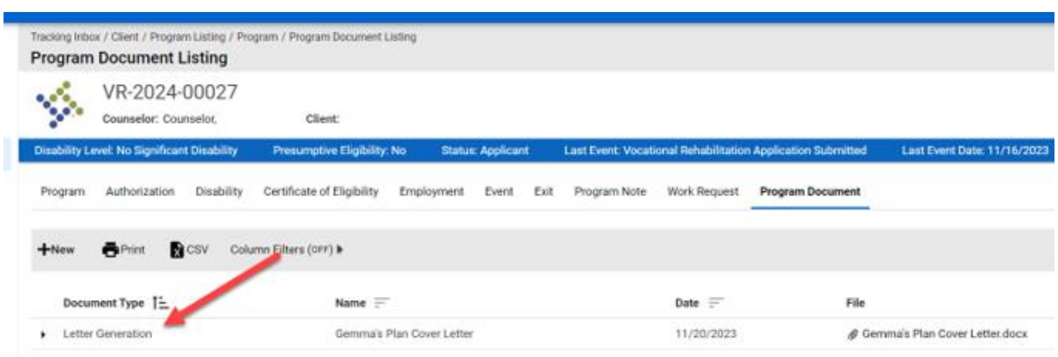


Figure 4-26 Program Document Listing

In **Document Type** the **Client Response Form**, **Consent Form**, **Eye Report** and **Supporting Documentation** will require the user to upload a document.

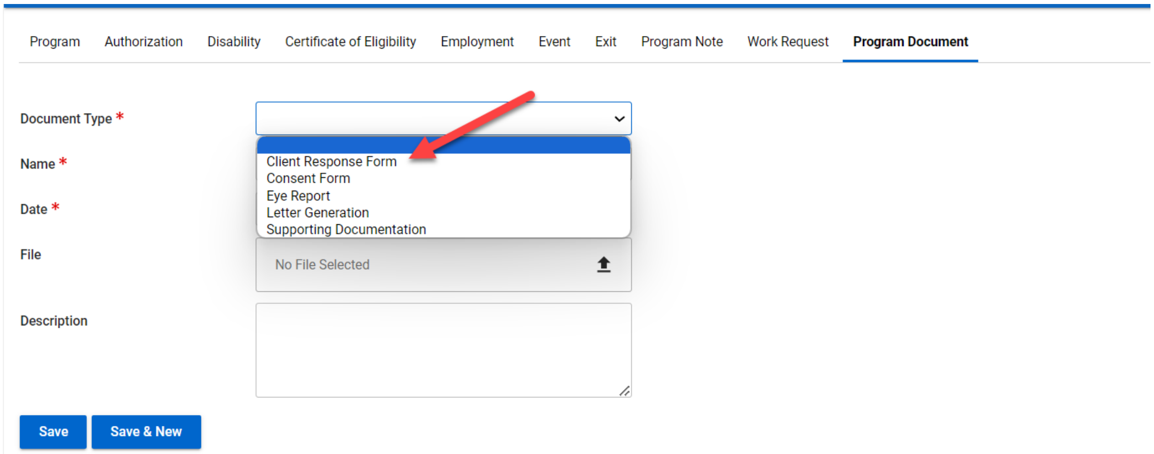


Figure 4-27 Document Type Drop-Down

Once the document type is selected the document upload is located at the File field. Select the arrow and with the line under it to upload the document:

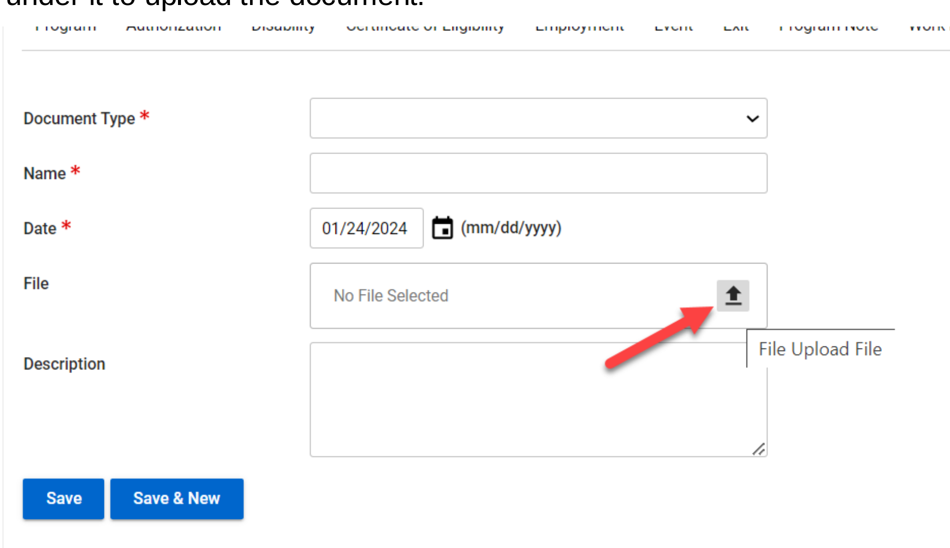


Figure 4-28 Document Type Upload Form

This will bring up the document file on the users computer where the document can be located:

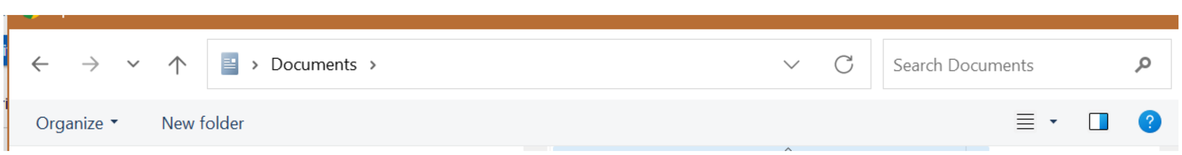


Figure 4-29 Document Location

Once the document is loaded the form can be saved. The document can then be located in the document listing:

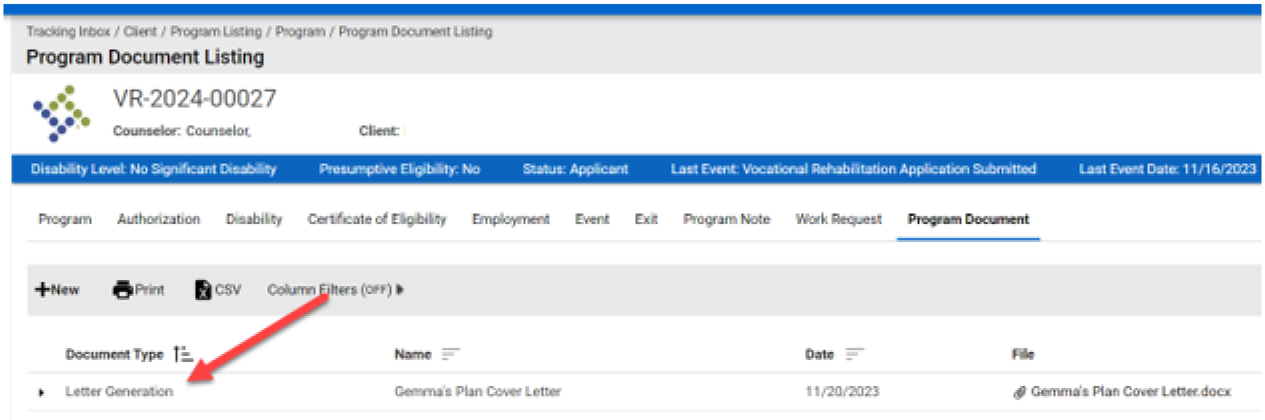


Figure 4-30 Program Document Listing

5 Disability

The Disability tab allows users to capture information related to the Client's disability for a Vocational Rehabilitation, Independent Living Younger Blind or Independent Living Older Blind program types. It is not available for the Potentially Eligible program type. Case Managers can capture disability specific information for different functional capacity limitation areas.

Business Rules

The "Disability Level" shown in the banner for the program is determined by the selections on the disability form.

The Disability Level Order Date cannot be a date that is earlier than the Date of Application on the Program tab.

Disability Priority auto calculates based on the following requirements:

- Disability Priority = 1: must have at least 1 selection in 3 different functional areas
- Disability Priority = 2: must have at least 1 selection in 1 to 2 different functional areas
- Disability Priority = 3: 0 functional areas

Disability Level will calculate as follows based on the Disability Priority:

- Disability Priority 1 = Most Significantly Disabled
- Disability Priority 2 = Significant Disability
- Disability Priority 3 = No Significant Disability

The Disability Level is used in the workflow to determine Eligibility.

5.1 Disability

1. Login with your system provided account and navigate to a client record.
2. On the client record click the **Program** tab in the top bar.
3. Click the **Program Type** in the **Program Listing** once displayed.

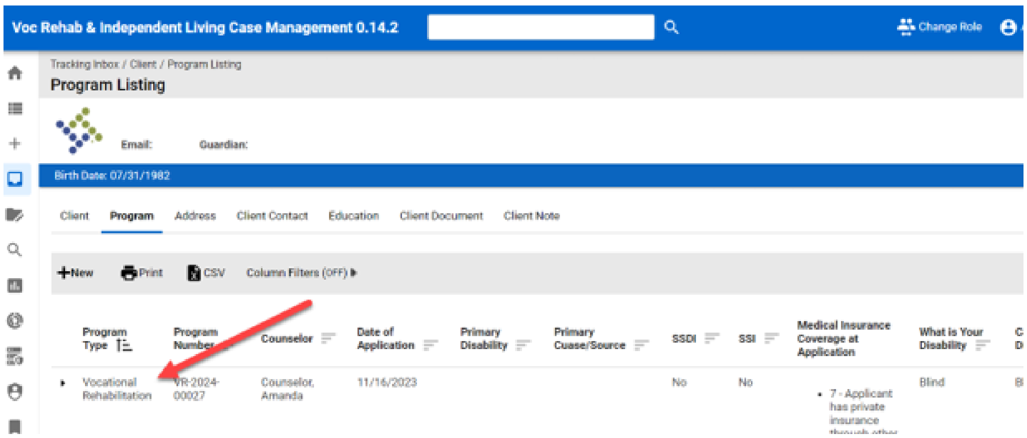


Figure 5-1 Client's Program Listing

4. When the Program form opens click the **Disability** tab in the top bar.

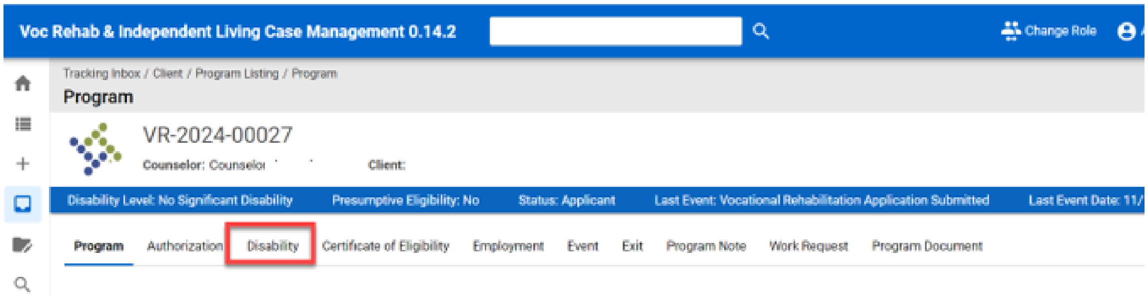


Figure 5-2 Disability Tab

5. The Disability form will display

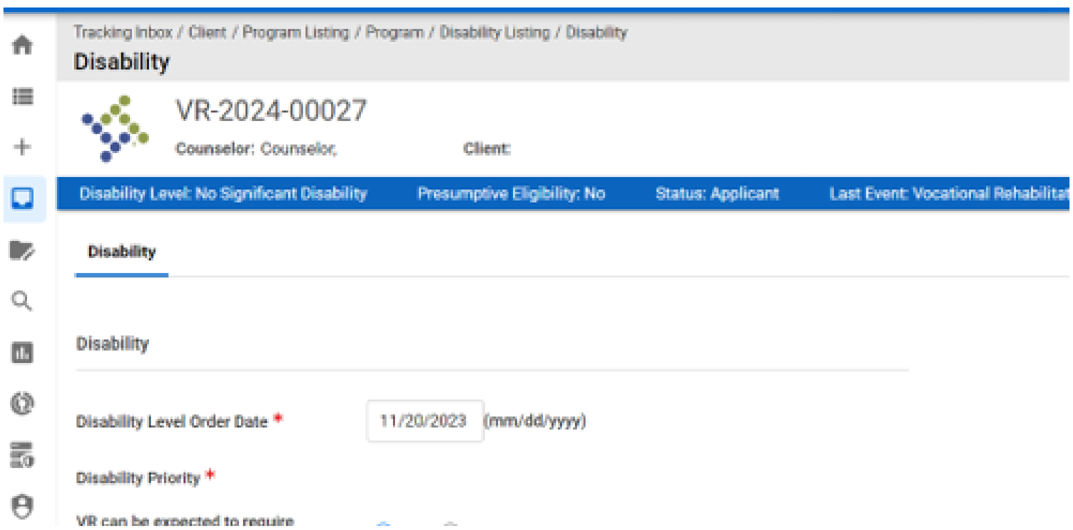


Figure 5-3 Disability Form

Prior to filling out the form the Disability Level will display as "**No Significant Disability**" in the blue banner.

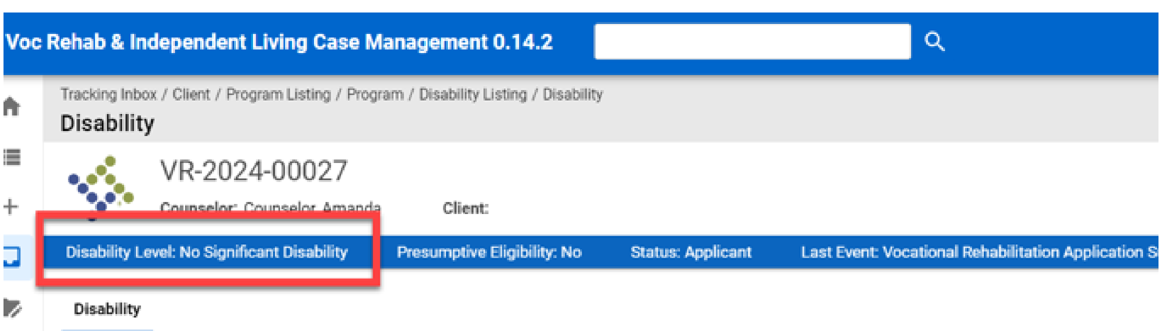


Figure 5-4 Blue Banner Displaying No Significant Disability

Upon filling out the form and clicking **Save** this will update based on the **Disability Level** that is calculated based on the selections on the form that was explained above. The **Disability Priority** will also display and become read only.

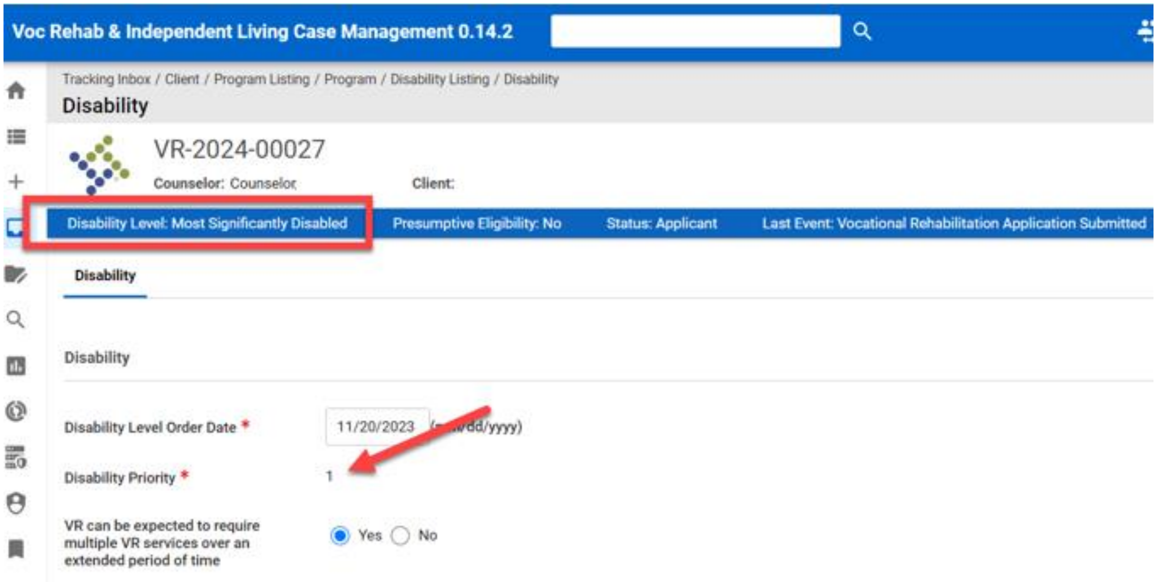


Figure 5-5 Disability Priority Displays on Form and is Read Only

Also listed on this form is the Counselor Rationale (not required) and Eye Report Information that is partially required depending on program type.

6 Certificate of Eligibility

The Certificate of Eligibility tab allows users to make a final determination on eligibility for a client who is applying for a Vocational Rehabilitation program.

Business Rules

- When 'Establish Eligibility' = Yes, the Certificate of Eligibility form becomes read-only for certain roles.
- Presumptive Eligibility is auto selected based on the SSI or SSDI selections on the Program tab.
- Eligibility Date cannot be a date that is earlier than the Date of Application on the Program tab.
- Eligibility Determination Extension field
  - Must be a date that is on or before the end date of the reporting quarter.
  - Must be equal to or before date in the Eligibility Date field on the Certificate of Eligibility tab.
- Eligibility Records cannot be marked as final until the Disability tab has been filled out.
- Benefits / Disability Information auto populates from the Program tab. Any changes made to this section will update back to the Program tab.
- The Disability tab must be filled out before the Certificate of Eligibility can be approved.
- The Certificate of Eligibility must be sent for review/approval by a Supervisor before the Eligibility letter can be generated.
- Once the Certificate of Eligibility is finalized, and the status has moved to 'Eligible,' then the user is able generate an Eligibility Letter.
- When Establish Eligibility = Yes and the form is saved, the workflow status will update accordingly based on the Program Workflow.

6.1 Certificate of Eligibility (COE)

1. Navigate to a client and click on their **program**.
2. When the program screen displays click on the **Certificate of Eligibility** tab at the top of the screen.

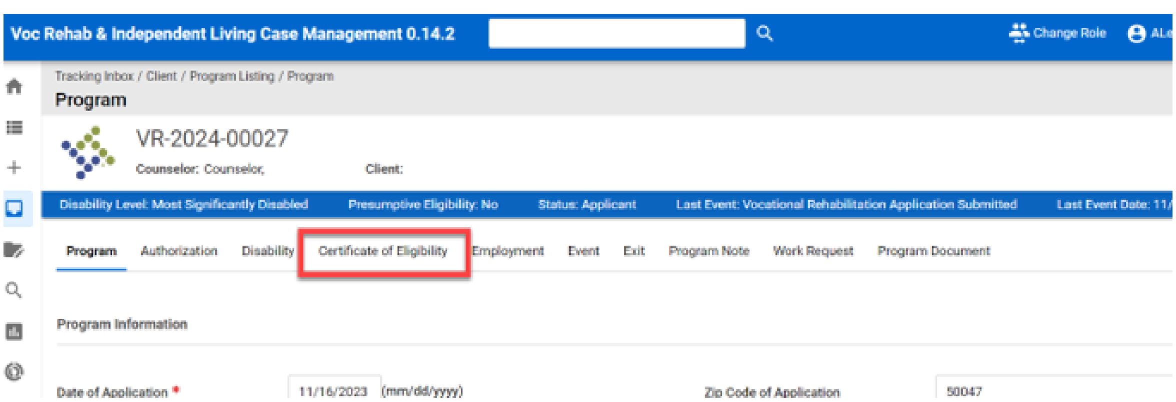


Figure 6-1 Certificate of Eligibility Tab

3. The Certificate of Eligibility form will display with a COE Status = Draft. This is a read only field and cannot be changed by the user without going through the workflow.

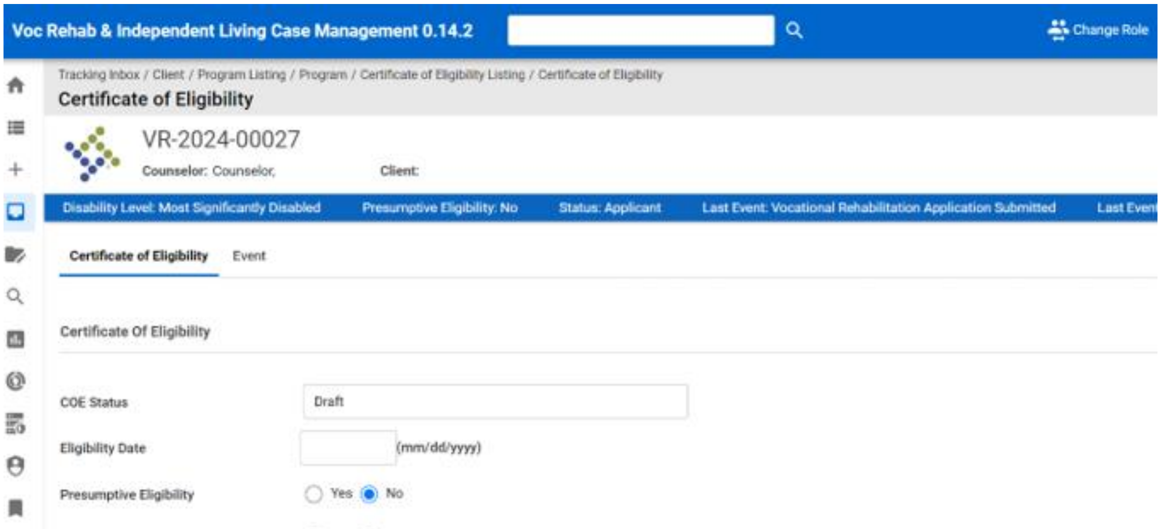


Figure 6-2 Certificate of Eligibility Form

4. Fill out all required fields.

Note: When Establish Eligibility is set to Yes, fields that were not required become required.

5. Once all fields are completed, the **Send to Supervisor for Review** drop down must be populated.

Figure 6-3 Send to Supervisor for Review

6. Click **Save**.

7. The screen will refresh and the COE Status will change to **Draft Pending Approval**.

Note: At any time the Event tab at the top of screen can be selected and it will display all events that have occurred during the COE workflow.

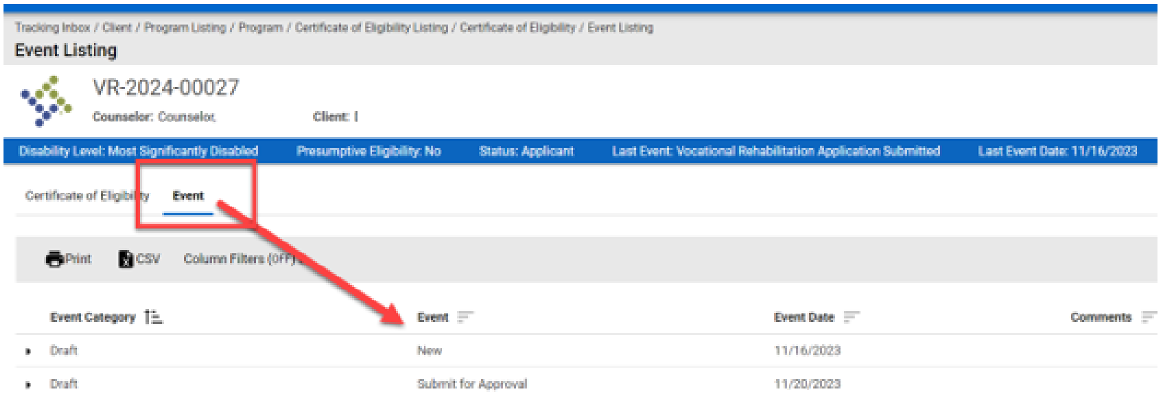


Figure 6-4 Event Listing

8. When a COE is sent to a supervisor for approval, it will appear on the Dashboard Queue COE Pending Approval as well as on their home screen in the COE Pending Approval section.

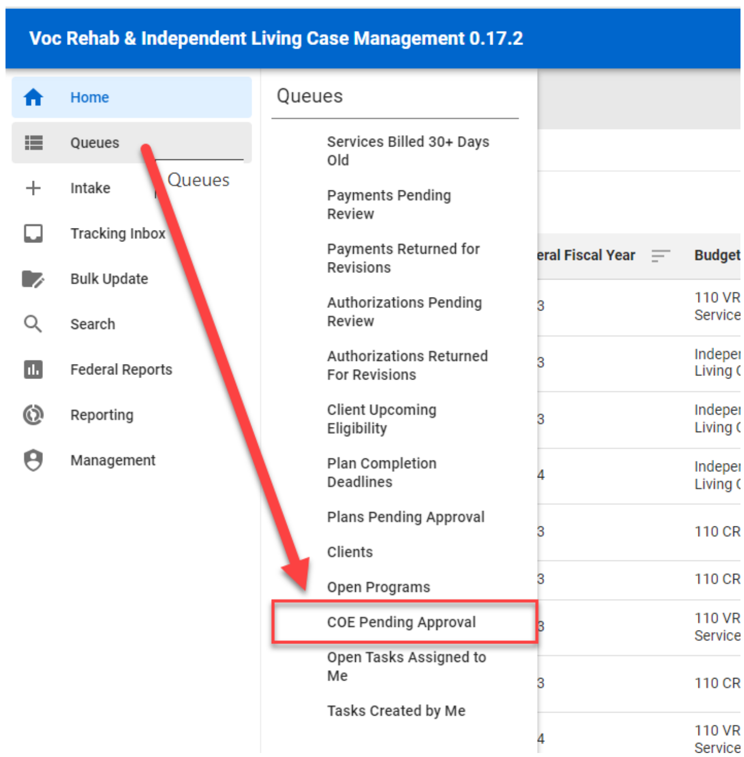


Figure 6-5 Queue Listing > COE Pending Approval Queue

9. From the queue a supervisor can click the COE record which will take them to the COE form. From there they can review it, make any required changes, approve it, or return it for revisions.

If being returned for revisions the supervisor can provide comments/reasons to the case manager.

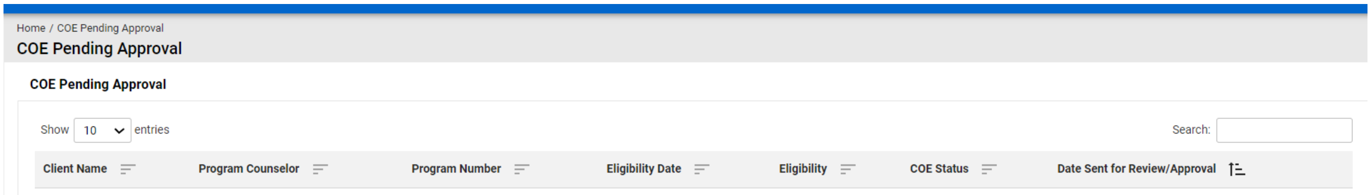


Figure 6-6 COE Pending Approval Queue

10. After the Supervisor clicks the **Approved** button, they still must sign the COE. Click the **pencil icon** (JAWS announces this as 'Signature) to the right of the Supervisor Signature and then **Save**.

11. The Supervisor must enter the **password** value associated with their profile and click the **OK** button. On successful entry of the password the status will change to Draft Approved. The date and the time of the approval is captured.

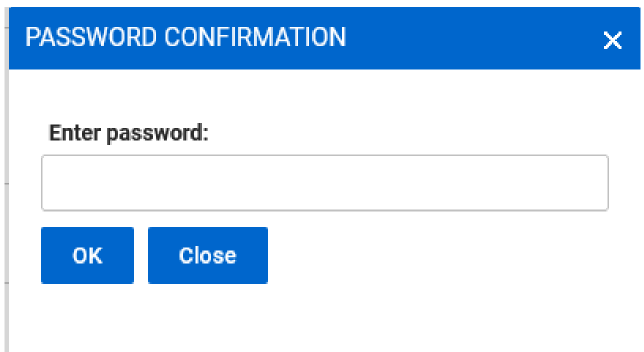


Figure 6-7 Password Entry Box

12. The Counselor must then pull up the Draft Approved COE and sign it as well, using the same signing process as the described previous. On completion of that step the status changes to Final. Once Final, the Eligibility letter can be generated.

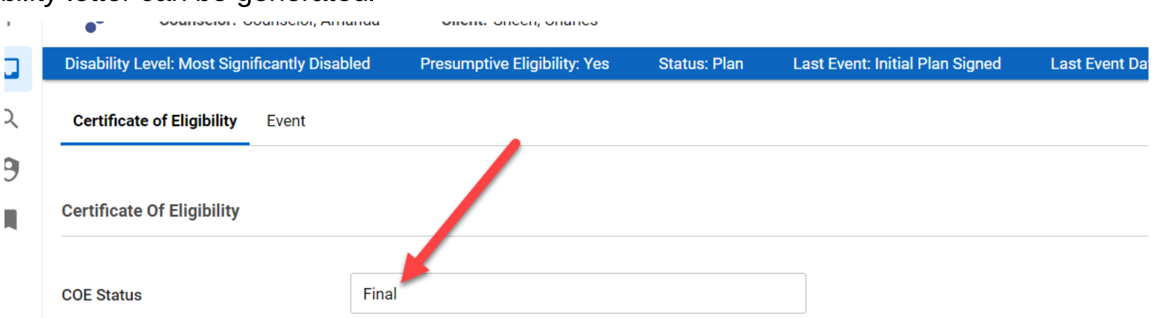


Figure 6-8 COE Status = Final

13. When a COE is returned by the Supervisor to the Counselor, it will appear on the Dashboard Queue COE In Progress.

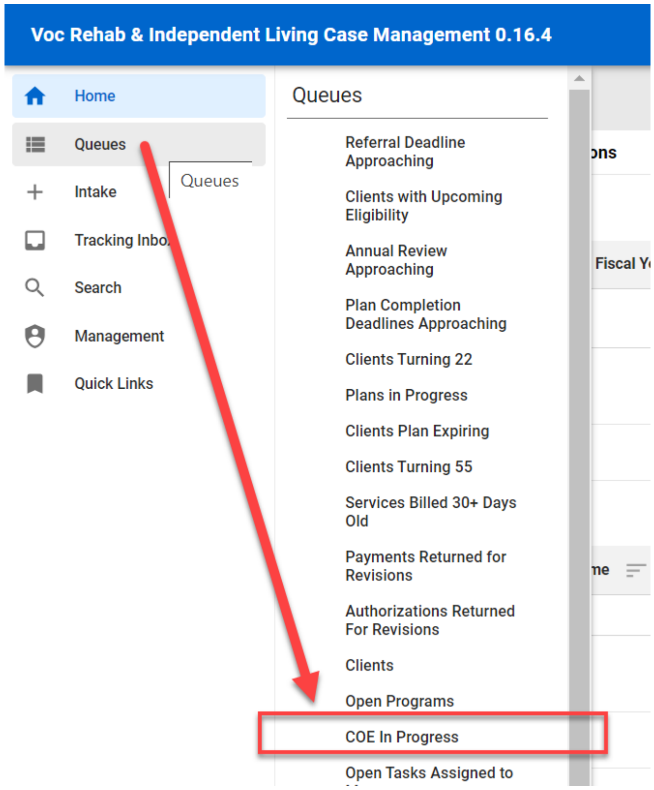


Figure 6-9 Queue Listing > COE in Progress

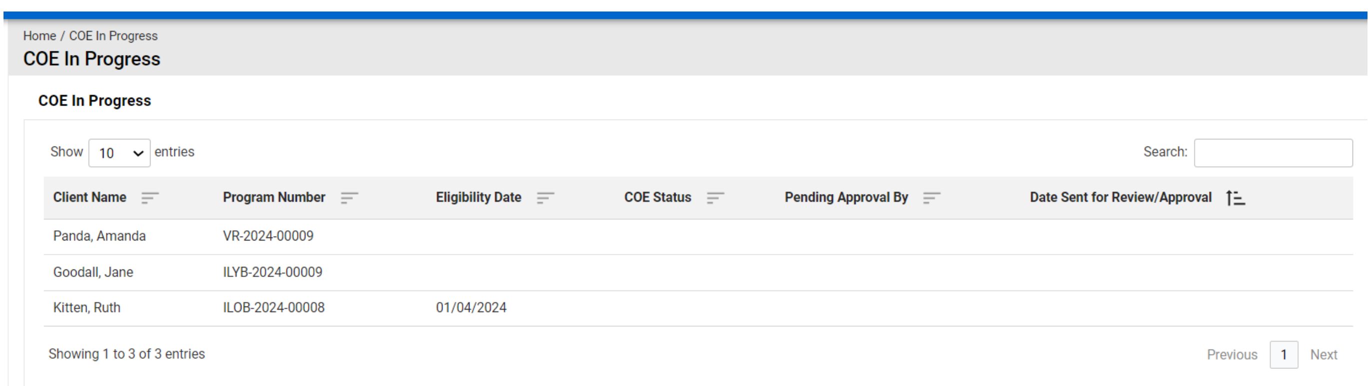


Figure 6-10 COE in Progress Queue

14. From the COE in Progress Queue a Counselor can click on the COE record which will take them to the COE form and they can then make any requested changes. The Supervisor Comments are available for review.

15. When ready, the COE can be sent back to the Supervisor for review/approval following the same signature steps as described previously.

16. If Establish Eligibility = Yes then the Certificate of Eligibility has been approved by a supervisor all fields on the form become read only for all users except the Administrator role.

6.2 Generating Eligibility Letters

Once a Certificate of Eligibility has been marked final, and the status has moved to 'Eligible,' the user will be able to generate an Eligibility Letter by selecting the '**Generate Eligibility Letter**' button.

1. Navigate to the client's **Program** > **Certificate of Eligibility** and scroll to the bottom of the screen. The **Generate Eligibility Letter** button now displays (previously this button was not available).

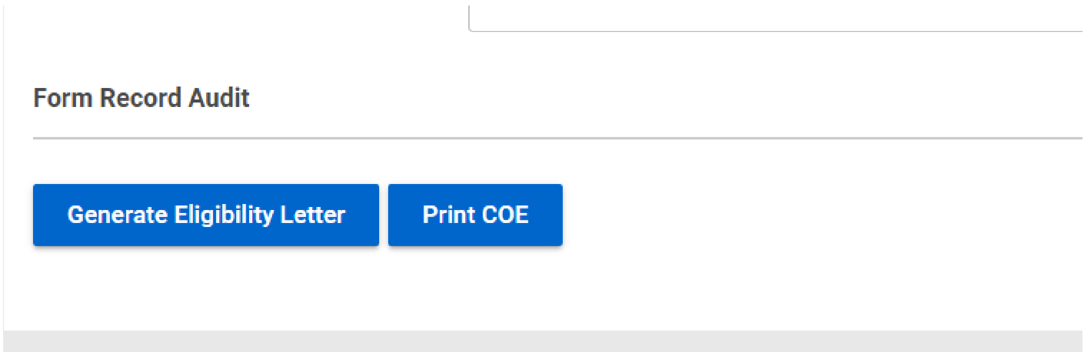


Figure 6-11 Generate Eligibility Letter Button

2. Click the **Generate Eligibility Letter** button, this will automatically take the user to the **Program Document** tab with **Letter Generation** displaying with the **Letter Template** type of **Eligibility Letter**.

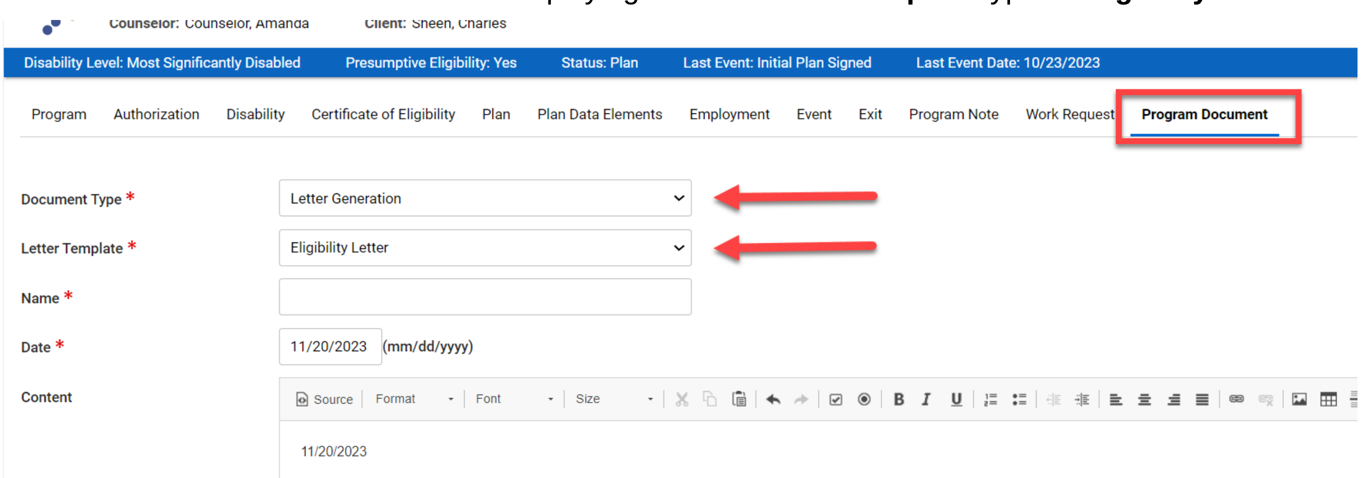


Figure 6-12 Generating an Eligibility Letter

3. Ensure all required fields are populated.

4. The Eligibility Letter can be modified as needed in the Content section of the form.

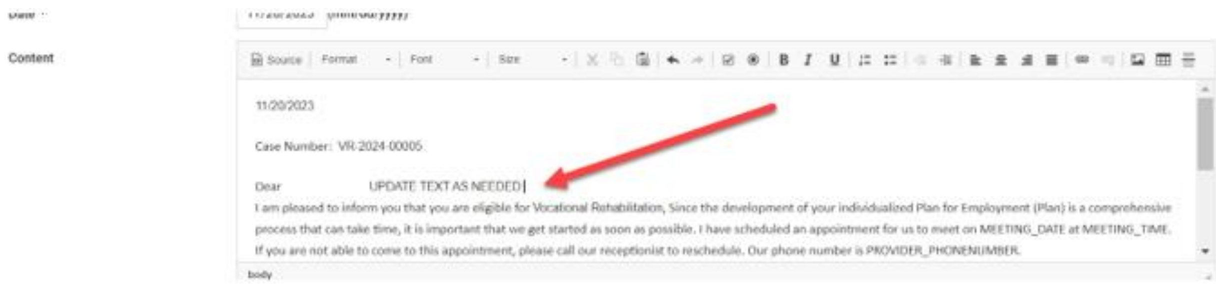


Figure 6-13 Letter Display

5. When document is ready click **Save**.
6. The Program Document Listing page will display and the COE Letter will be located there.

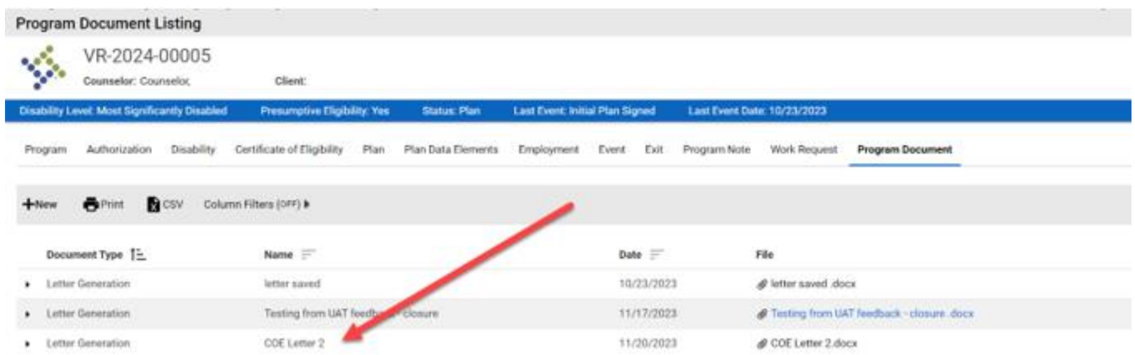


Figure 6-14 Program Document Listing

7. The Certificate of Eligibility can also be printed; click the Print COE button on the bottom of the form.

Figure 6-15 Print COE Button

8. This will create the Certificate of Eligibility in the Downloads folder of your computer.

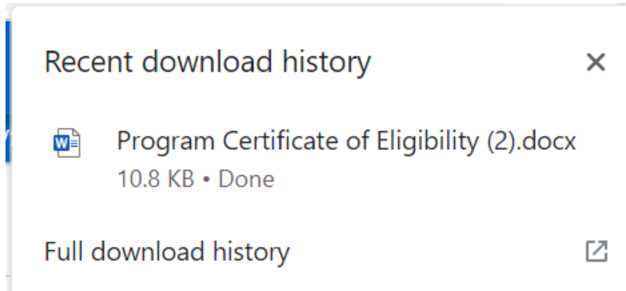


Figure 6-16 Download History Location

9. The Certificate of Eligibility can then be opened as a Word docx file and saved locally and/or sent to a local printer.

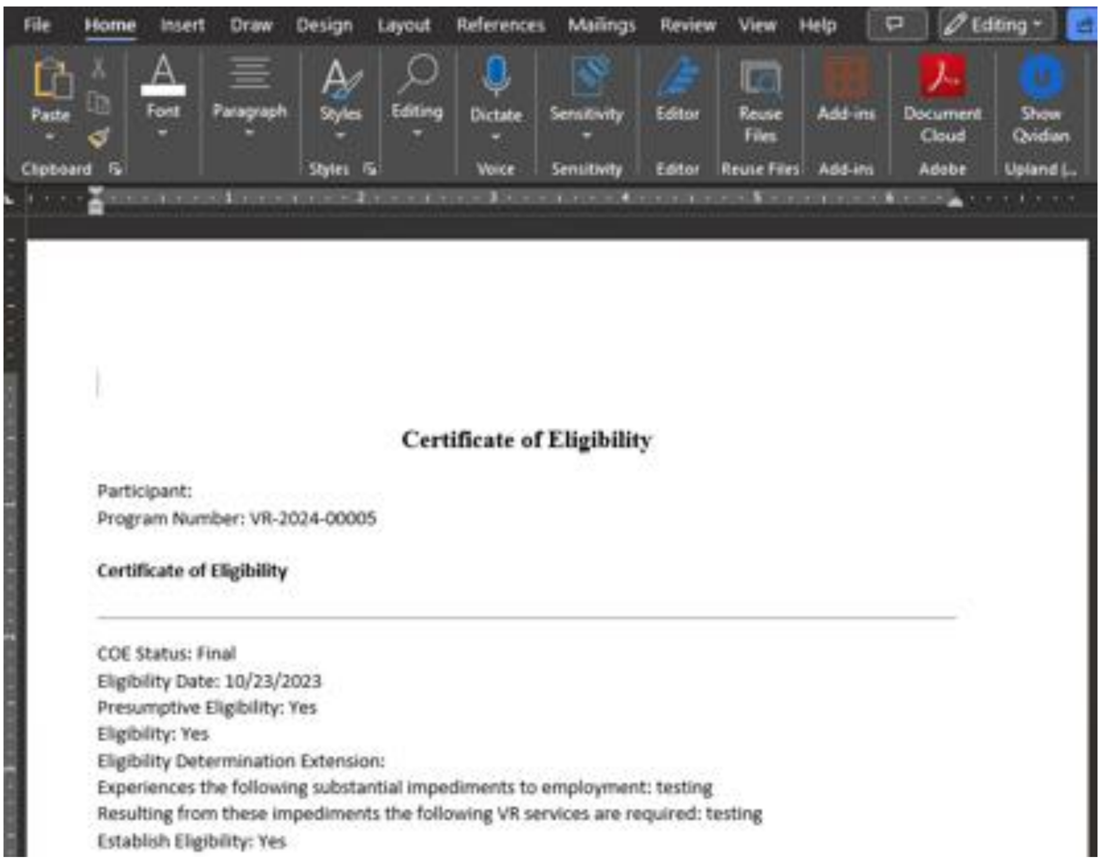


Figure 6-17 Certificate of Eligibility Word Document

7 Individual Plan for Employment

The Individualized Plan for Employment (Plan) is the plan outlining the client's vocational goal(s), and the services to be provided to reach that goal. This plan is created on the basis of the program assessment that is conducted by the program specific Case Manager after the client's eligibility for vocational rehabilitation services is established. Once the Certificate of Eligibility tab is saved, and the client is shown as eligible, the Plan is available.

Potentially Eligible clients do not have a plan option until they are converted to a Vocational Rehabilitation client in which time the plan tab becomes available.

Independent Living program types have two plan options to choose from, the Waiver or the Independent Living Rehabilitation Program (ILRP) Plan.

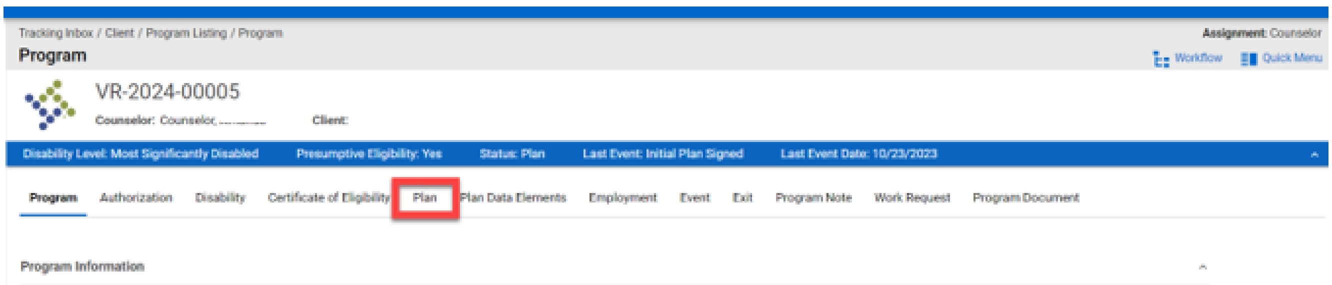


Figure 7-1 Plan Tab

Features

- Users are able to create a plan for the Potentially Eligible, Vocational Rehabilitation and Independent Living Younger Blind and Independent Living Older Blind Programs for their clients.
- The system provides initial responsibility options. When a responsibility is selected, the Client Responsibilities field pre-populates with text that the user can modify or add onto.

Business Rules

- A newly created plan automatically defaults to 'Draft' status.
- The 'Plan Edition' field increments each time the plan is amended. The 'Plan Edition' begins at 1, the 'Plan Edition' updates (1, 2, 3…) with each saved Amendment to the plan.
- 'Signature Date' cannot be a future date, the Signature Date is required when the status of the Plan is made 'Final.
- 'Goal Completion' date allows for any future date.
- The Plan Data Elements tab must be filled in before the Plan can be marked as Final for Vocational Rehabilitation program types. This tab is not used for Independent Living program types.
- Employment at Initial Plan on the Employment tab must be filled in before Plan can be marked as Final for Vocational Rehabilitation program types only. Independent Living program types do not require employment information.
- Once a Plan is made 'Final,' all fields become read only.

- When services related to the plan are provided, a Program Note with Note Type 'Services Verified' is required to be entered. The 'Use for Initial Service' check box must be checked when the first initial service(s) for the plan are provided. Once this box is selected, it will never appear on the note form again.
- When a plan is 'Amended' all the data from the original (last) plan, is copied to a 'Plan History' tab. This ensures that each amendment made to a plan does not overwrite the previous plan. The new plan is saved as a new version.
- When a plan is 'Amended' the 'Plan Edition' is updated, and the status for the new amended plan is set to 'Draft.'
- Once the plan has been amended and is in a status of 'Draft' the plan will have to progress through the workflow again requiring approvals and signatures.
- To finalize a plan there are two fields that are required to be completed; one of which does not display as required. These are the 'Plan Sent to Client' field and the 'Signature Received Yes/No' radio buttons. If these are not completed the plan will stay in a 'Draft Pending Finalization' status.
- Plans Statuses include:
  - Draft
  - Draft Pending Staff Review
  - Draft Reviewed
  - Draft Pending Approval
  - Draft Approved
  - Draft Requires Revisions
  - Draft Pending Finalization
  - Final

Note: When services are entered on a plan the initial Program Note of 'Services Verified' and the checkbox for 'Use For Initial Start Date' need to be completed.

7.1 Entering a Vocational Rehabilitation Plan

Note: The Certificate of Eligibility must be completed, and the client is in a status of Eligible in order for the Plan tab to display.

1. To create a plan navigate to the client's program form and click Plan tab near the top of the screen.

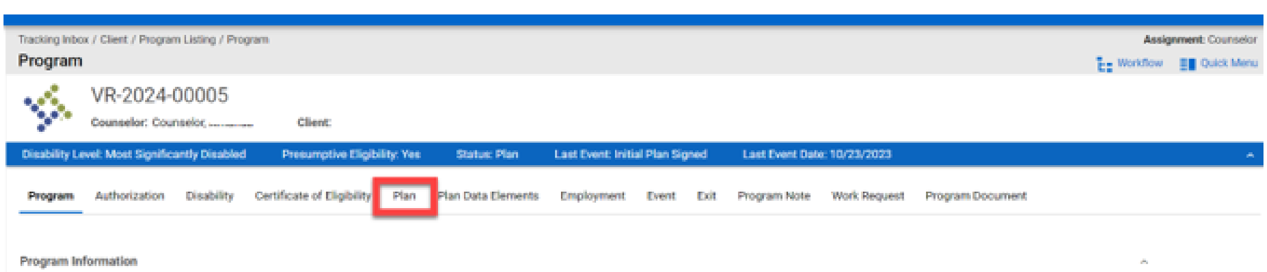


Figure 7-2 Plan Tab

2. The plan form will display.

3. Enter the Client's **Employment Goal**, **Service Start Date, Goal Completion Date, SOC, Job Title** and **Signature Date**.

Note: Employment Goal does not apply to Independent Living program types.

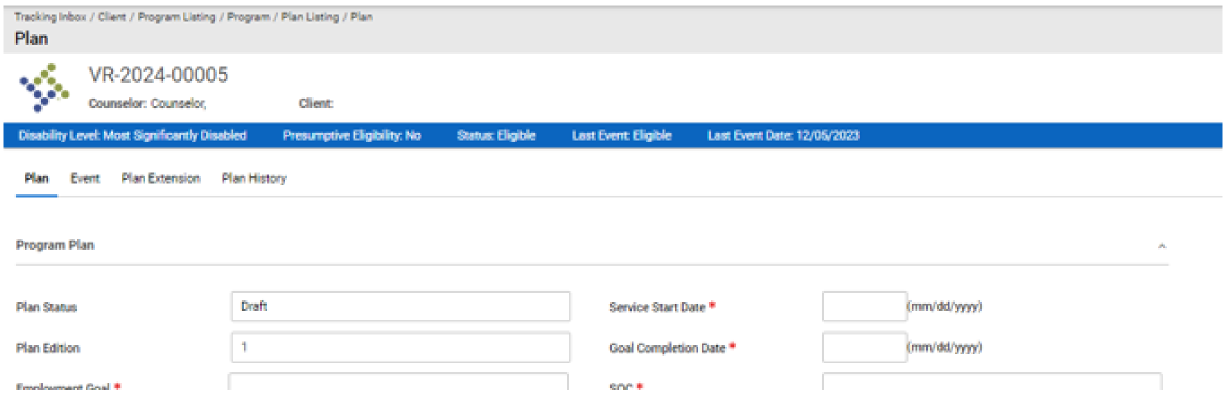


Figure 7-3 Plan Form

4. Enter the Responsibility and Resources related information for the plan. The system provides default responsibility options in the 'Responsibility' drop-down menu.

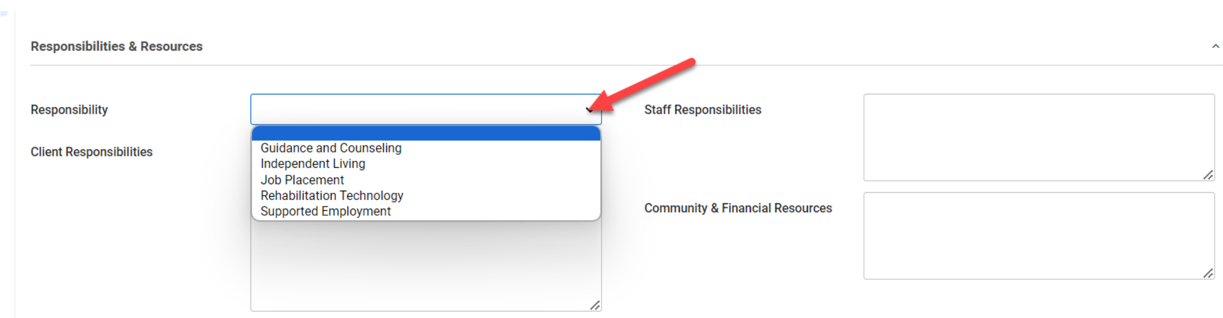


Figure 7-4 Responsibility & Resources Section

5. Complete the Plan Review Details section:

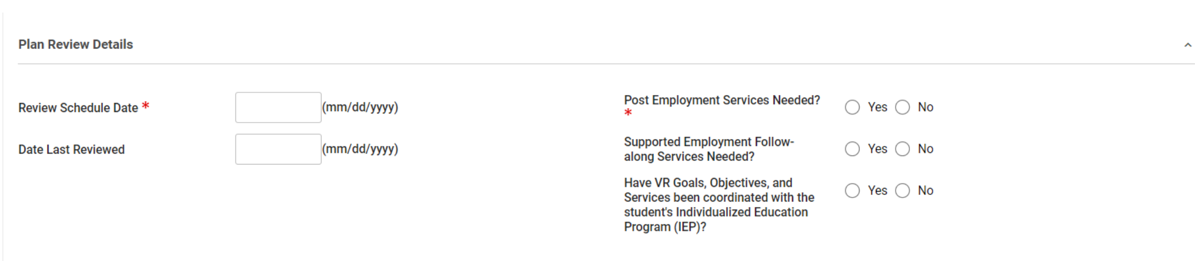


Figure 7-5 Plan Review Details Section

6. Add Services to the plan by selecting the **Add Service Category** button.

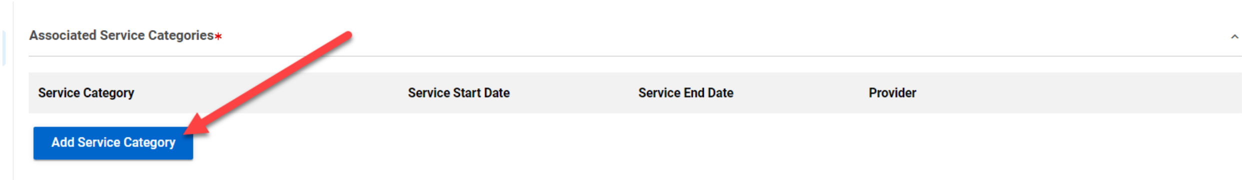


Figure 7-6 Add Service Category Button

7. The table will expand allowing the user to select the services by clicking the **drop down**, filling in the **Service Start Date**, **Service End Date** and **Provider**. To add additional services, click the **Add Service Category** button again. This can be done as many times as needed.

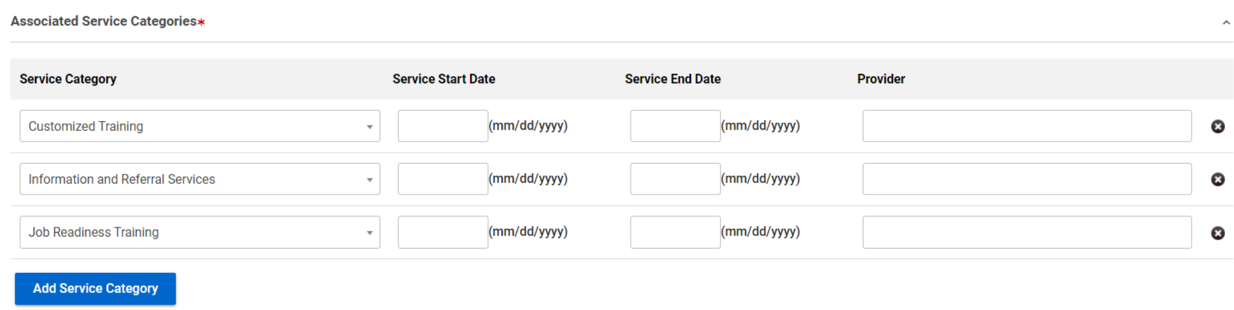


Figure 7-7 Associated Service Categories

8. There is a comments section for any necessary remarks.

Note: The Employment at Initial Plan section and the Plan Data Elements will need to be completed before a Vocational Rehabilitation plan can be sent for review; this information is covered in section 7.3 following the plan entries. Independent Living program types do not require this data to be populated.

These are located from the Program tab OR can be completed through the Quick Menu if the user is already on the plan and does not wish to navigate away from it.

9. Once the Plan Data Elements and IX.C Employment at Initial Plan are completed the plan can be sent for review.

10. Complete the Review/Approval section by selecting **Send to Support Staff for Review** dropdown.

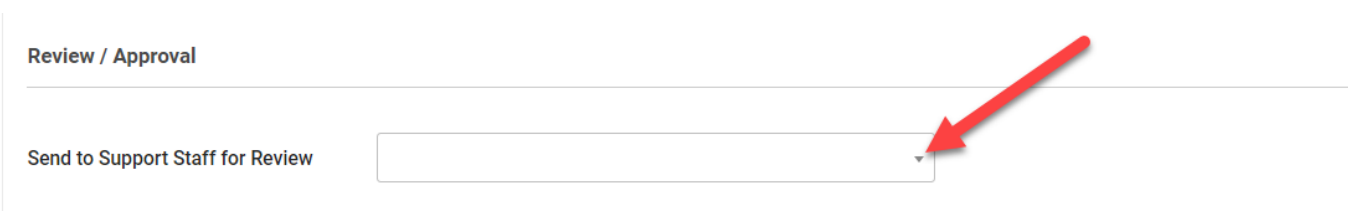


Figure 7-8 Send to Support Staff for Review

11. Click **Save**.

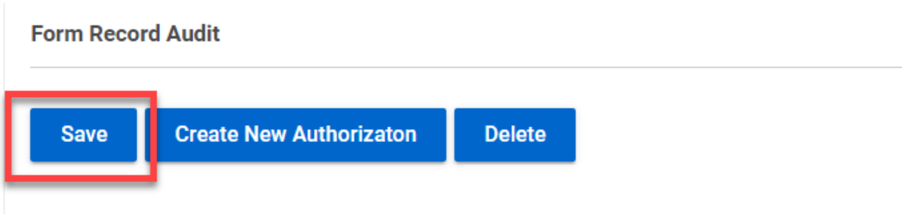


Figure 7-9 Save Button

12. The Creator Signature field will display. Click on the pencil icon next to the field.

13. The Password entry box will display. Enter the same password used for system log in. The creators name will then display in the signature field.

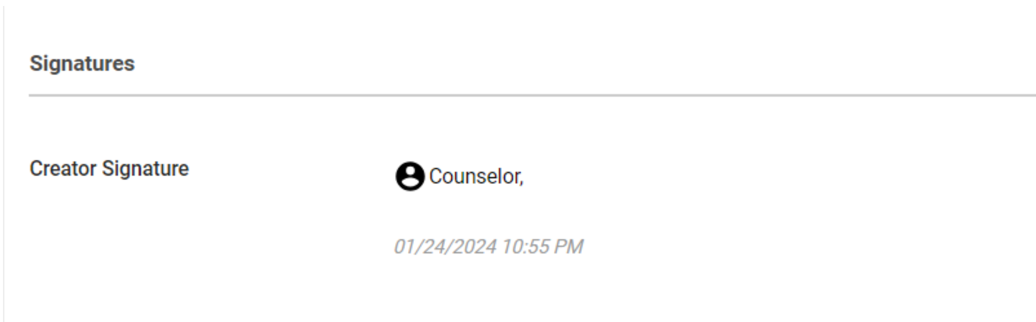


Figure 7-10 Creator Signature

The Support Staff will be notified that a plan is available for review.

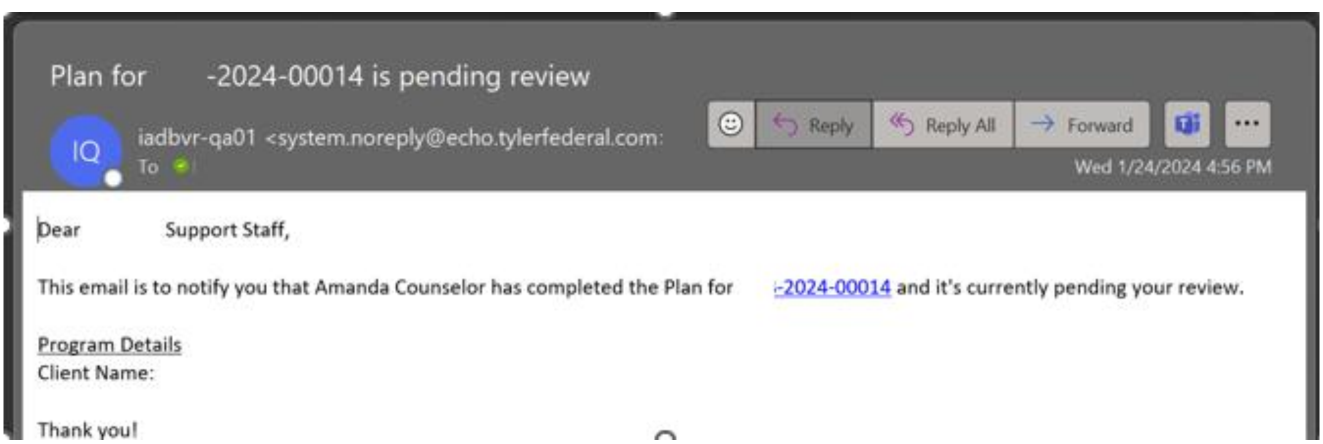


Figure 7-11 Email: Plan Pending Review

The next steps are for a Support Staff member to complete:

14. Navigate to the **Plans Pending Review Queue**

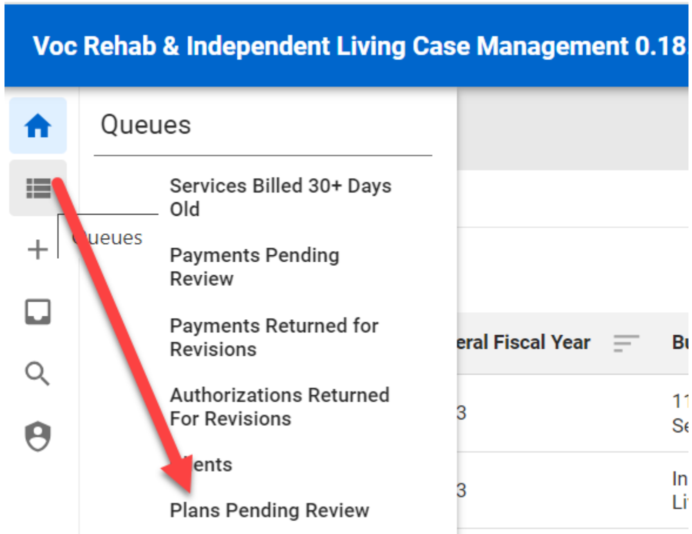


Figure 7-12 Plans Pending Review Queue

15. Locate the client whose plan needs to be reviewed.

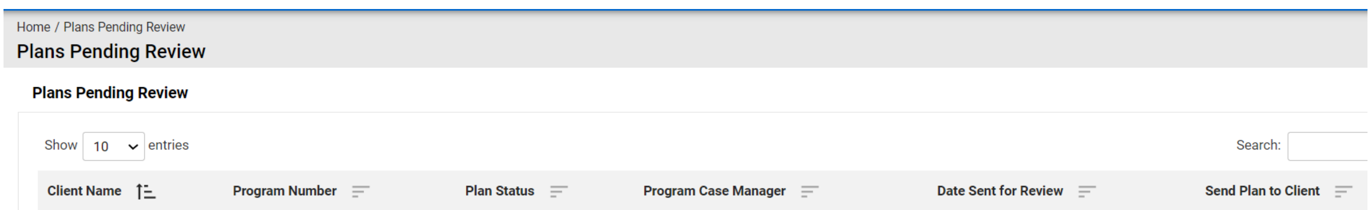


Figure 7-13 Plans Pending Review Queue Listing

16. Navigate from the Client record to the **Program tab** and click on the **Plan** in the top ribbon.

17. Once on the plan review for accuracy. If all is correct navigate to the bottom of the plan form and choose the Supervisor who will be approving the plan in the **Send to Supervisor for Approval drop-down**.

Note: If for any reason something needs to be corrected, the plan can be sent back to the Counselor for Revisions. The plan will then have to proceed back through the workflow.

18. The Password entry will display, enter the password associated with your user account.

19. Click **Save**.

20. The Plan will now be in a Status of Draft Pending Approval.

21. The Plan will now be routed to the Supervisor for review/approval (located in their queue; they will also receive an email notification).

The Supervisor will then:

22. Navigate to the **Plans Pending Approval Queue**

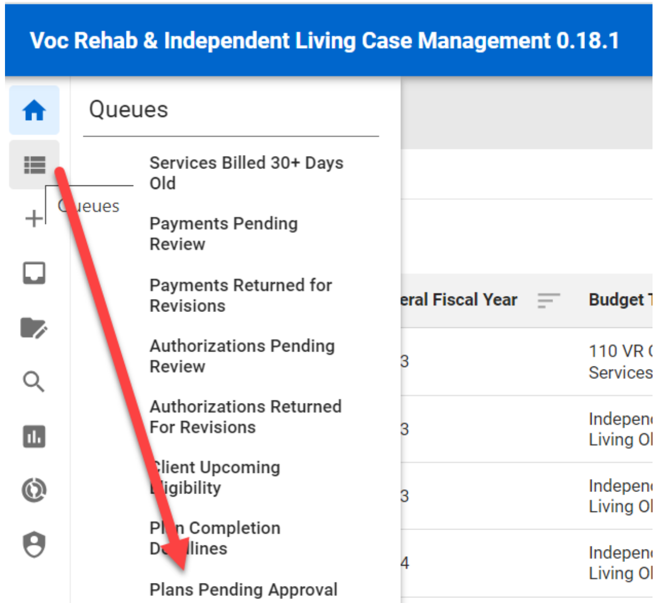


Figure 7-14 Plans Pending Approval Queue

23. Locate the client whose plan needs to be reviewed/approved.

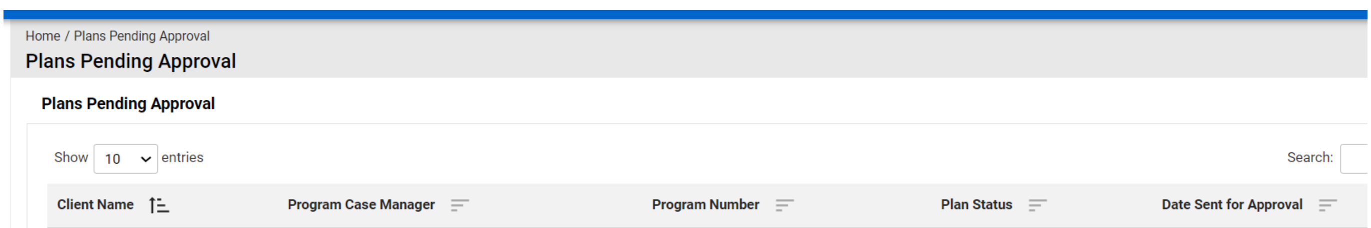


Figure 7-15 Plans Pending Approval Queue Display

24. Navigate from the Client record to the Program tab and click on the **Plan** in the top ribbon.
25. Review the client's Plan. If all is correct navigate to the bottom of the plan form and choose the **Save** button.
26. The Password entry will display, enter the password associated with your user account.
27. The Plan will update to Draft Pending Finalization and become read only.

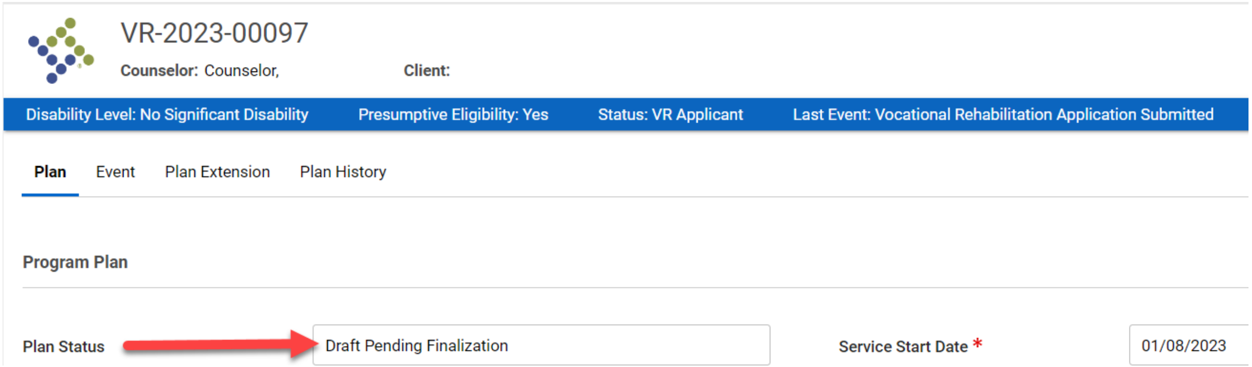


Figure 7-16 Draft Pending Finalization

28. The Plan is then routed back to Support Staff to Finalize and provide to client.
29. Support Staff will locate the plan as previously done and complete approval.

Note: Client Signature Received field and Plan Sent to Client Date must be completed.

30. The plan can then be printed if needed.

7.2 Entering an Independent Living Plan

Note: The Certificate of Eligibility must be completed, and the client is in a status of Eligible in order for the Plan tab to display.

1. To create a plan navigate to the client's program form and click **Plan** tab near the top of the screen.

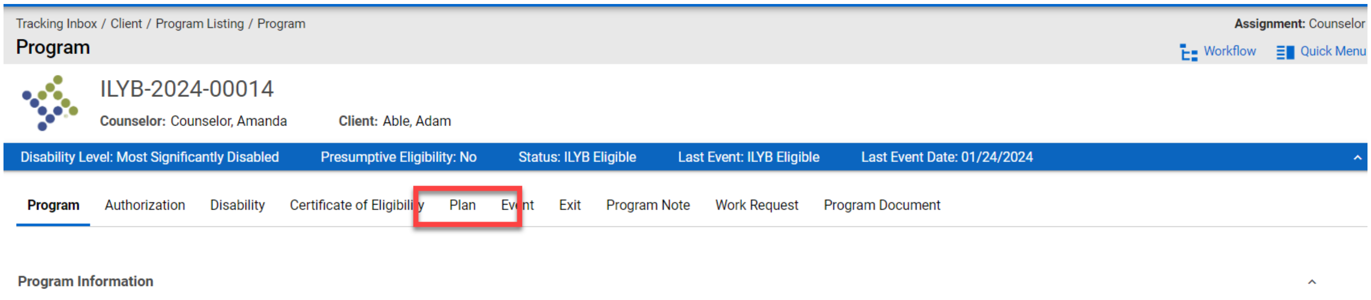


Figure 7-17 Plan Tab

2. The plan form will display and be in a status of Draft.

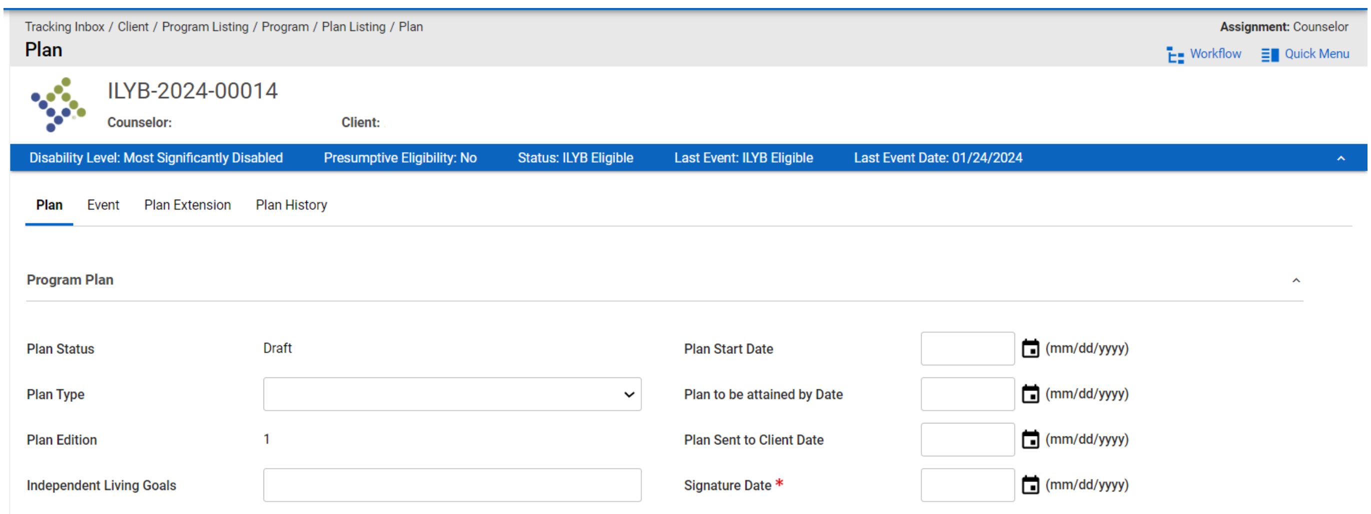


Figure 7-18 Plan Form

Note: When the screen first displays the Services section will not display. Once the Plan Type is chosen the services section will display.

3. The Independent Living programs have two plan types to choose from:
    - Waiver
    - Independent Living Rehabilitation Program (ILRP)
4. Choose the Plan Type best suited for the client.

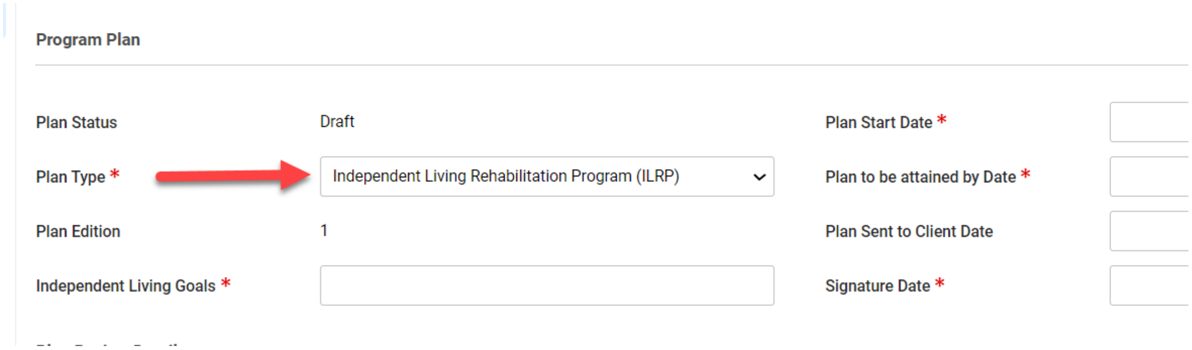


Figure 7-19 Plan Type

5. Fill out the required fields.
6. To add services to the plan click the **Add Service** button.

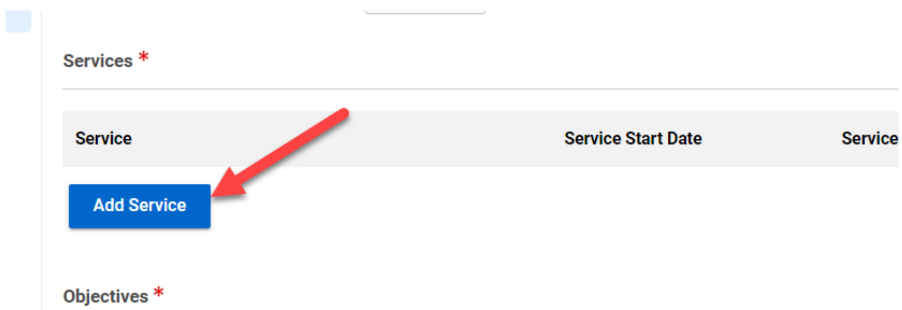


Figure 7-20 Add Services Button

7. Once the button is clicked the Service fields will display.

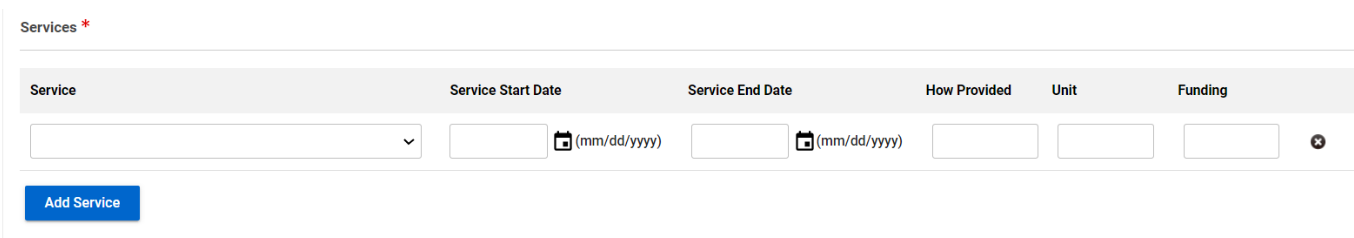


Figure 7-21 Service Fields

8. Fill out the Services section. As many services as needed can be added.
9. To add objectives to the plan click the **Add Objective Type** button.

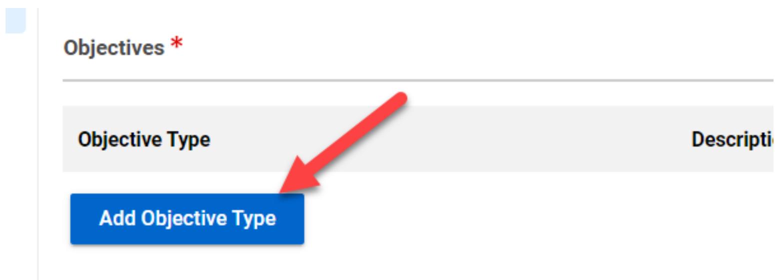


Figure 7-22 Add Objective Type Button

10. Once the button is clicked the Objective fields will display.

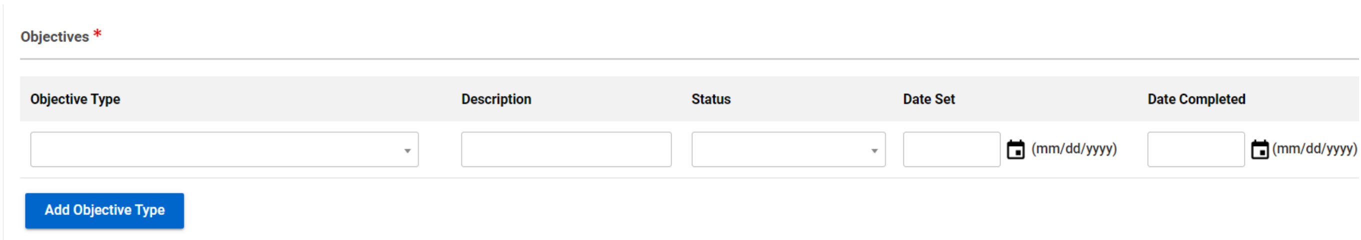


Figure 7-23 Objective Fields Display

11. Fill out the Objectives section. As many objectives as needed can be added.

12. In the Objectives section the Date Set field is required but the Date Completed is not required at time of plan creation.

13. Once all fields required are populated. Scroll to the Review/Approval section and in the Send to Support Staff for Review select the appropriate staff member in the drop-down box.

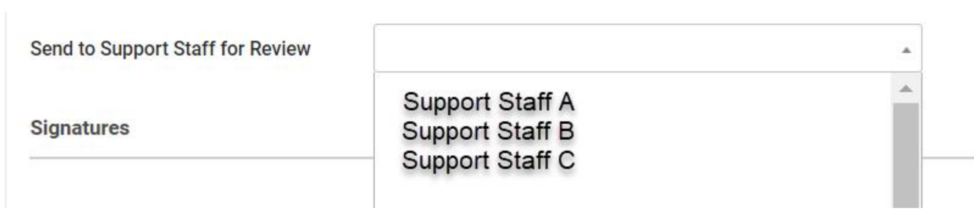


Figure 7-24 Send to Support Staff to Review

14. Click **Save**.

15. The Creator Signature field will display. Click on the **pencil icon** (JAWS announces this as 'Signature') next to the field.

16. The Password entry box will display. Enter the same password used for system log in. The creators name will then display in the signature field.

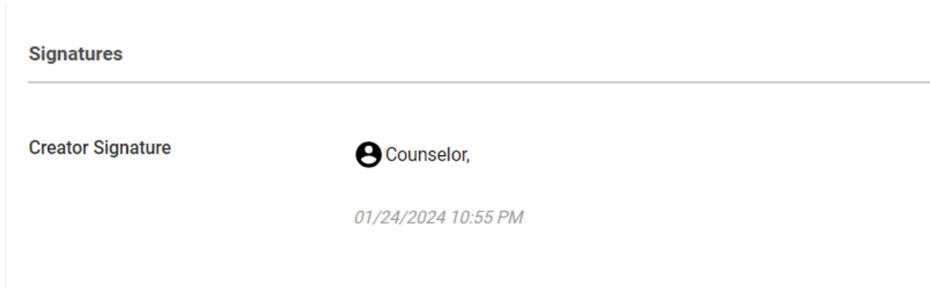


Figure 7-25 Creator Signature Field

17. The Plan Status will now be in a status of Draft Pending Staff Review.

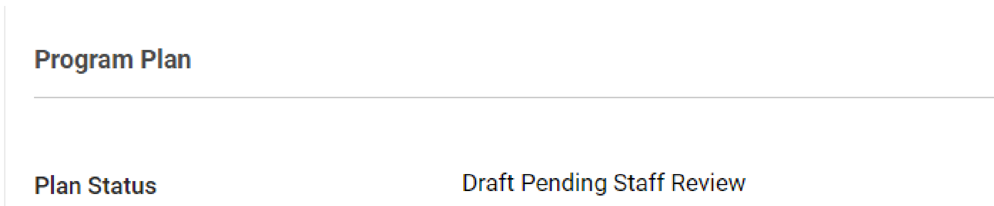


Figure 7-26 Plan Status of Draft Pending Staff Review

18. The support staff assigned to review will receive an email notifying them of the review request.

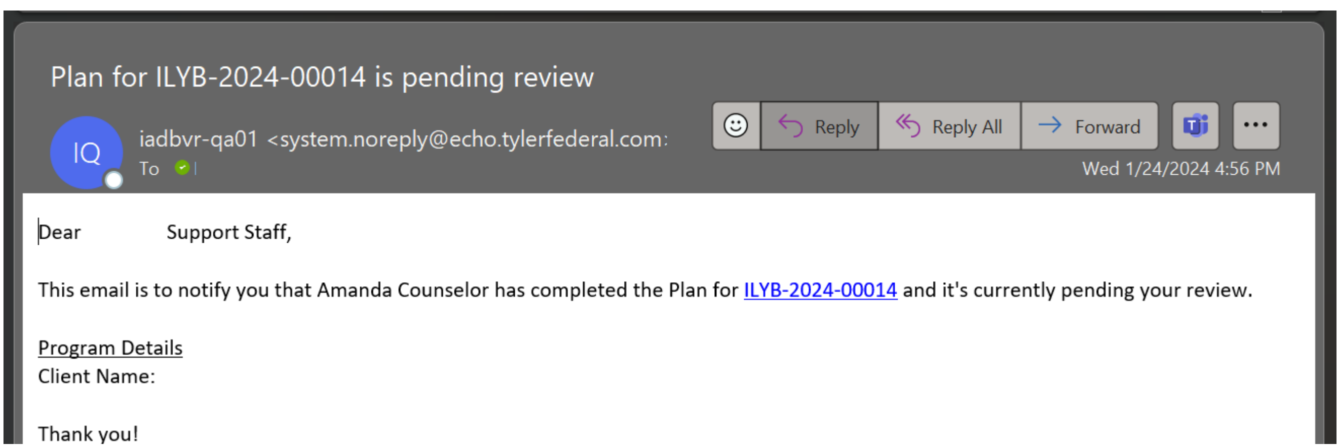


Figure 7-27 Email to Support Staff

19. The Support Staff will see the plan pending review in the queue of Plans Pending Review.

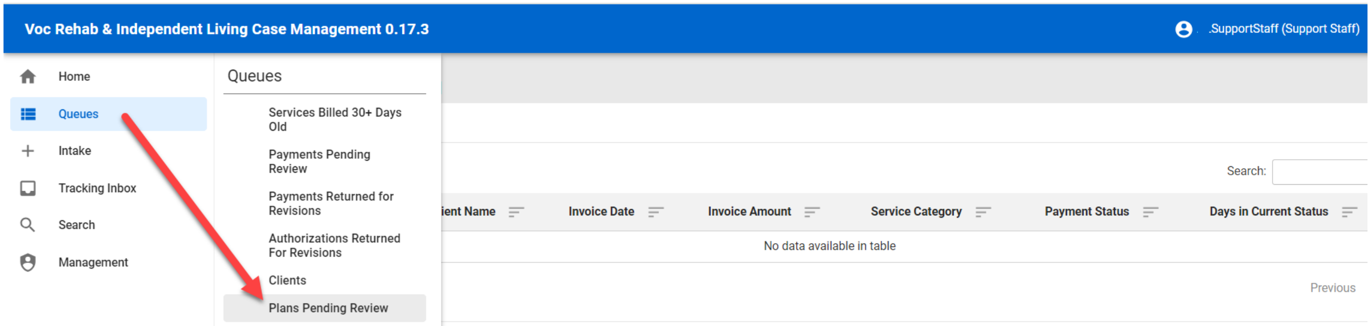


Figure 7-28 Support Staff Plans Pending Review Queue

20. The Support Staff will click the plan record and review the plan.

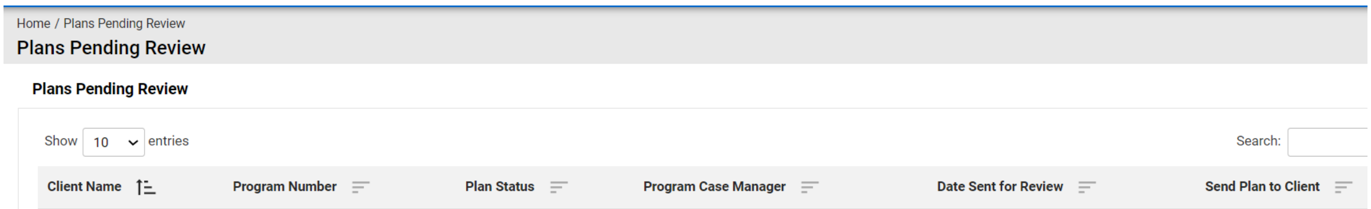


Figure 7-29 Plans Pending Review Queue Listing

21. Navigate from the Client record to the Program tab and click on the **Plan** in the top ribbon.

22. Once on the plan review for accuracy. If all is correct navigate to the bottom of the plan form and choose the Supervisor who will be approving the plan in the **Send to Supervisor for Approval drop-down**.

Note: If there is an error identified the plan can be sent back to the Counselor for Revisions.

23. The Password entry will display, enter the password associated with your user account.

24. Click **Save**.

25. The Plan will now be in a Status of Draft Pending Approval.

26. The Plan will now be routed to the Supervisor for review/approval (located in their queue; they will also receive an email notification).

The Supervisor will then:

27. Navigate to the **Plans Pending Approval Queue**

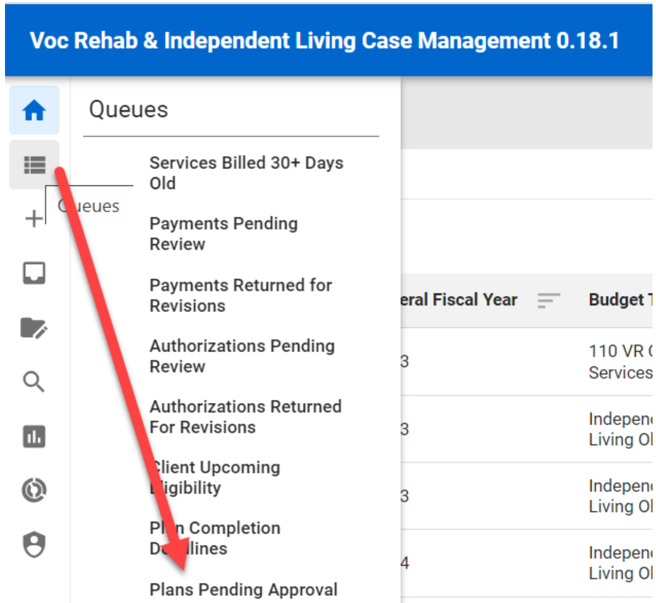


Figure 7-30 Plans Pending Approval Queue

28. Locate the client whose plan needs to be reviewed/approved.

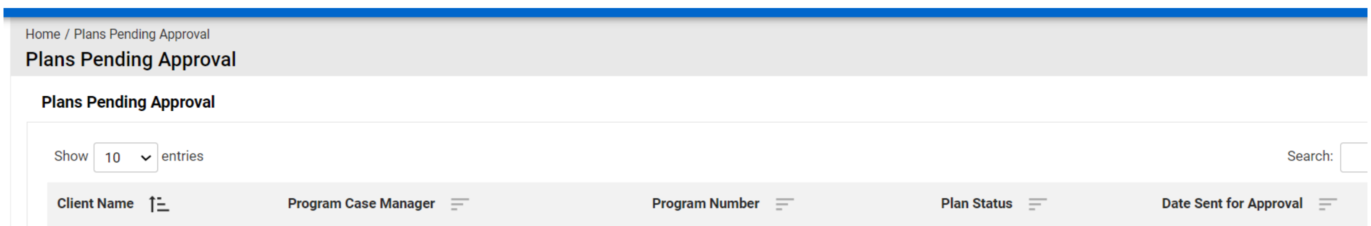


Figure 7-31 Plans Pending Approval Queue Display

29. Navigate from the Client record to the Program tab and click on the **Plan** in the top ribbon.

30. Review the client's Plan. If all is correct navigate to the bottom of the plan form and choose the **Save** button.

31. The Password entry will display, enter the password associated with your user account.

32. The Plan will update to Draft Pending Finalization and become read only.

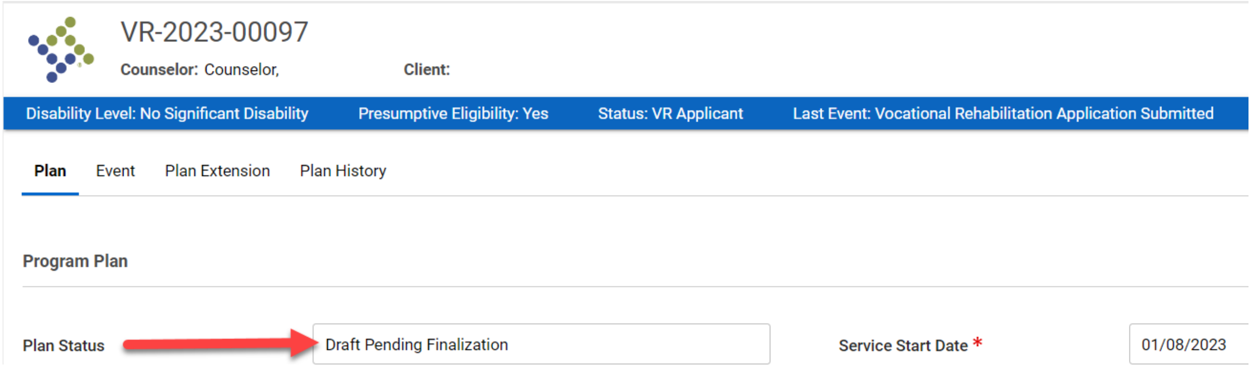


Figure 7-32 Draft Pending Finalization

33. The Plan is then routed back to Support Staff to Finalize and provide to client.
34. Support Staff will locate the plan as previously done and complete approval.

Note: Client Signature Received field and Plan Sent to Client Date must be completed.

35. The plan can then be printed if needed.

7.3 Plan Data Elements

The Plan Data Elements tab collects important RSA911 related data about the Individualized Plan for Employment.

Business Rules

- The Plan Data Elements tab has many required fields that are required for collecting data for reporting on the RSA 911.
- Before a plan can be marked as Final, all the required fields on the Plan Data Elements tab must be filled in. If they have not a message is displayed to the user: "Plan Data Elements tab must be filled in before a Plan can be marked as Final."
- The Plan Data Elements tab is not required for Independent Living program types.

1. There are two ways to access the Plan Data Elements.

A. Navigate to the client's Program and in the top ribbon click on the **Plan Data Elements** tab.

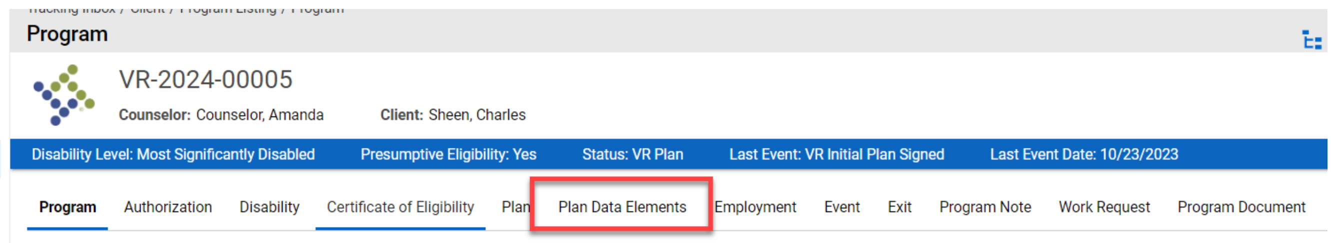


Figure 7-33 Plan Data Elements Tab

B. Or, if the user is already on the plan and does not want to navigate away from the plan and lose any work, scroll back to the top of the screen, and click on the Quick Menu; this will open a window on the right side of the screen. Here is where the Plan Data Elements and Employment can be completed without having to navigate away from the plan.

Plan Data Elements and Employment are required before a plan can be marked as Final.

Note: Employment can also be completed from the Employment tab on the Program Form; covered in section 8. Employment and From the Quick Menu section 8.5.

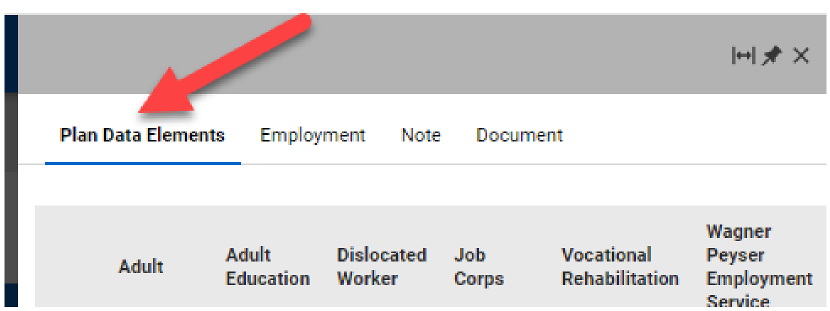


Figure 7-34 Quick Menu > Plan Data Elements

2. Click the Plan Data Elements tab.

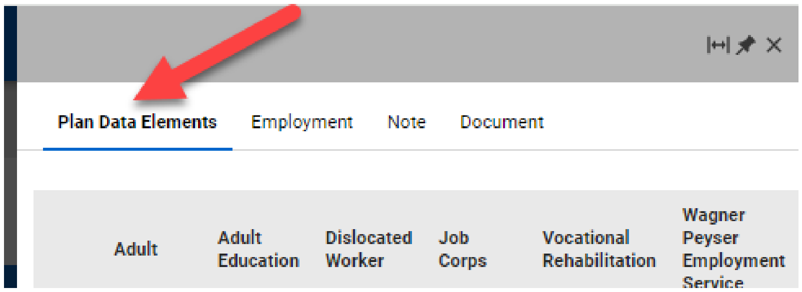


Figure 7-35 Quick Menu > Plan Data Elements Tab

3. Click the Pencil icon on the Plan Data Elements tab.

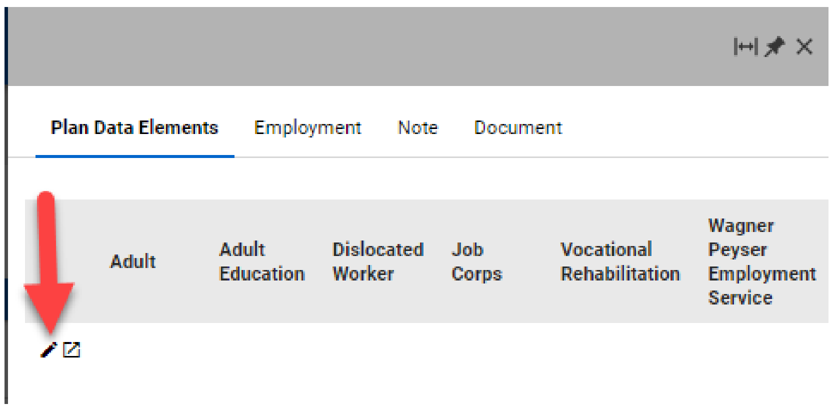


Figure 7-36 Quick Menu > Plan Data Elements Tab Pencil Icon

4. This will display the Plan Data Elements form. Complete all the required fields.

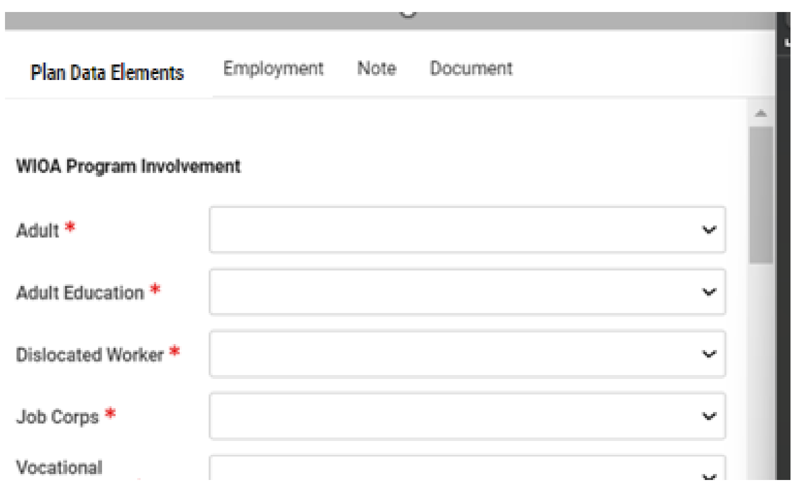
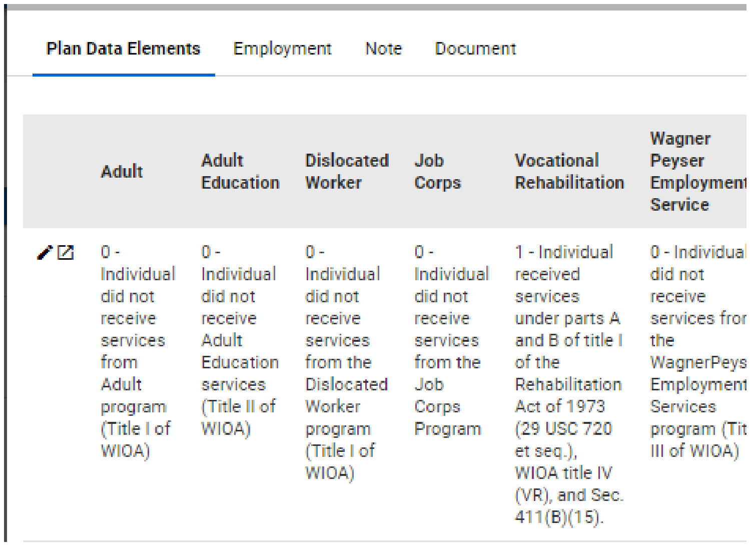


Figure 7-37 Quick Menu > Plan Data Elements Form

5. Click **Save**.

6. Once saved the form will populate.



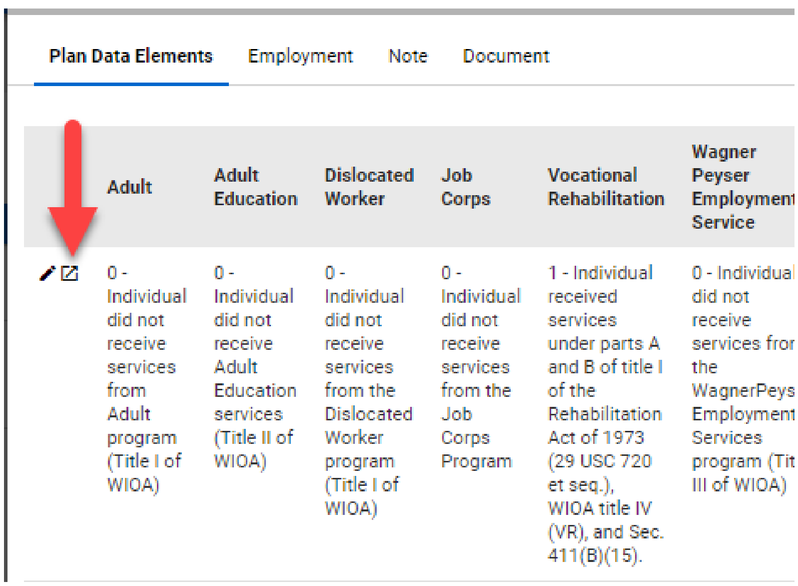
Plan Data Elements | Employment | Note | Document

	Adult	Adult Education	Dislocated Worker	Job Corps	Vocational Rehabilitation	Wagner Peyser Employment Service
	0 - Individual did not receive services from Adult program (Title I of WIOA)	0 - Individual did not receive Adult Education services (Title II of WIOA)	0 - Individual did not receive services from the Dislocated Worker program (Title I of WIOA)	0 - Individual did not receive services from the Job Corps Program	1 - Individual received services under parts A and B of title I of the Rehabilitation Act of 1973 (29 USC 720 et seq.), WIOA title IV (VR), and Sec. 411(B)(15).	0 - Individual did not receive services fror the WagnerPeys Employment Services program (Tit III of WIOA)

Figure 7-38 Quick Menu Plan Data Elements Populated

7. To edit it at any time simply click the **pencil** icon again.

Note: To expand the menu to another window, click the square icon with the arrow pointing right.



Plan Data Elements | Employment | Note | Document

	Adult	Adult Education	Dislocated Worker	Job Corps	Vocational Rehabilitation	Wagner Peyser Employment Service
	0 - Individual did not receive services from Adult program (Title I of WIOA)	0 - Individual did not receive Adult Education services (Title II of WIOA)	0 - Individual did not receive services from the Dislocated Worker program (Title I of WIOA)	0 - Individual did not receive services from the Job Corps Program	1 - Individual received services under parts A and B of title I of the Rehabilitation Act of 1973 (29 USC 720 et seq.), WIOA title IV (VR), and Sec. 411(B)(15).	0 - Individual did not receive services fror the WagnerPeys Employment Services program (Tit III of WIOA)

Figure 7-39 Quick Menu Edit Functionality

7.4 Plan Extension

The Plan Extension tab allows users to enter and track data for extensions related to the Plan.

Business Rules

- Cannot create a Plan Extension unless on the Plan tab Status = Draft and Plan Edition = 1
- On Plan Tab, if status does not = Draft or Plan Edition does not = 1 then Plan Extension tab will be read only
- Plan Extension can be deleted by anybody who has access to the case.
- Plan Extension can be marked as Final even if the Plan is already marked as Final.
- Creation Date auto populates with the current date and is read only.
- Plan Development Extension Date cannot be a future date and must be equal to or after the Eligibility Date.
- Approval Assign To populates with users who have a role of Supervisor from the Office selected on the Program tab.
- Extension Status
  - Read only
  - Options are: Draft and Approved
  - Will update to Approved once the Approve button is clicked.
- Approve Button

7.4.1 Creating a Plan Extension

1. Navigate to the client's plan. Click the Plan Extension tab to enter an Plan Extension record.

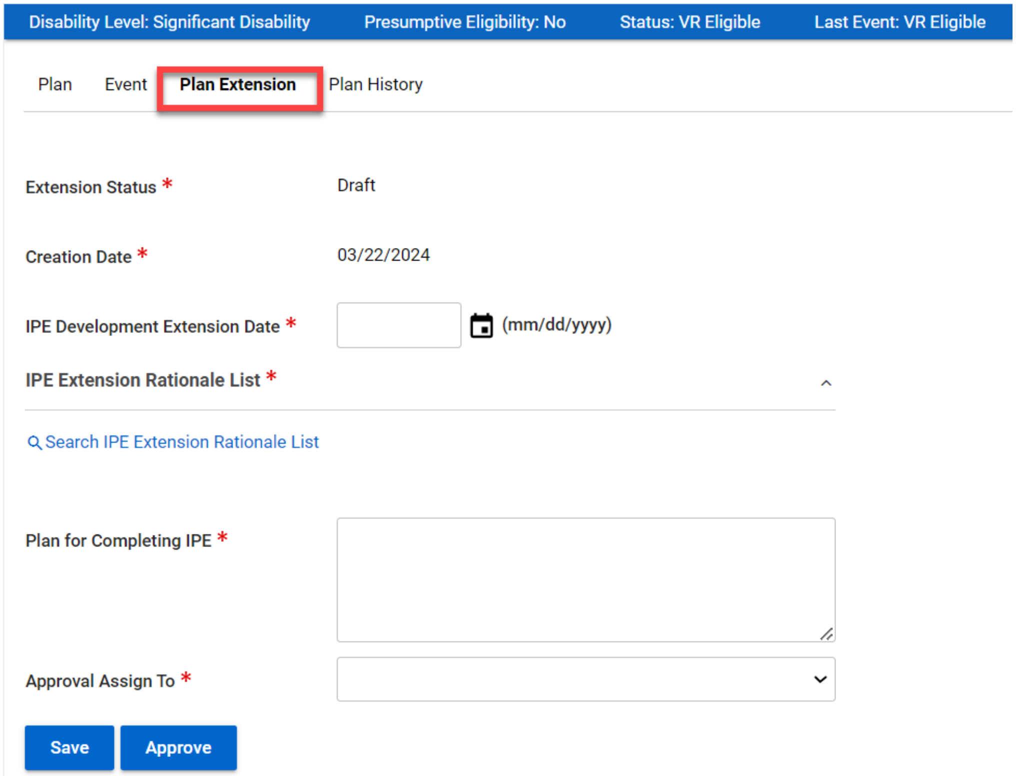


Figure 7-40 Plan Extension Form

2. Enter in all required fields and click **Save**.

3. After the IPE Extension has been saved as a draft, the Supervisor can then go in and approve the extension by clicking **Approve**.

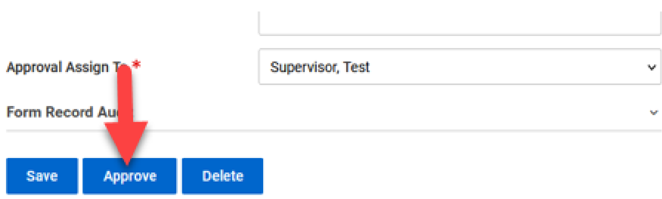


Figure 7-41 Approve Plan Extension Button

4. Once approved, the form becomes read only for all roles except users with a role of Administrator or who have the VR Administration function.

7.5 Plan History

The Plan History tab displays all records associated with updates to a plan.

1. Navigate to a client's program and click the **Plan** tab in the top ribbon.

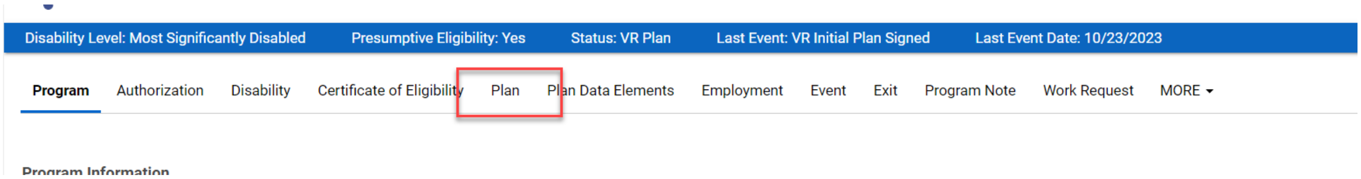


Figure 7-42 Plan Tab

2. The plan will display.

3. At the top of the plan form are three tabs: Plan (current form), Event, and Plan History. Click **Plan History**.

4. The Plan History Listing will display.

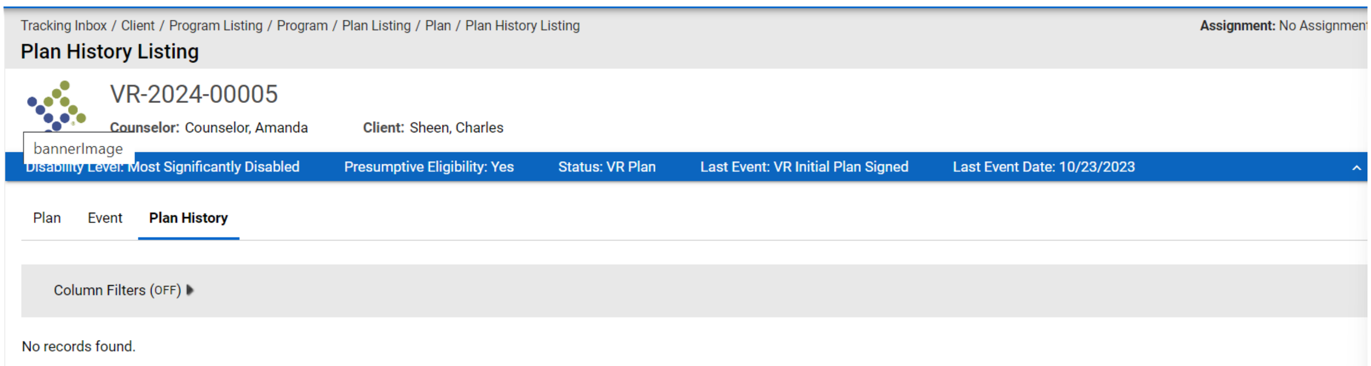


Figure 7-43 Plan History Tab

7.6 Plan Event

The Plan Event tab displays all events associated with the plan.

1. Navigate to a client's program and click the **Plan** tab in the top ribbon.

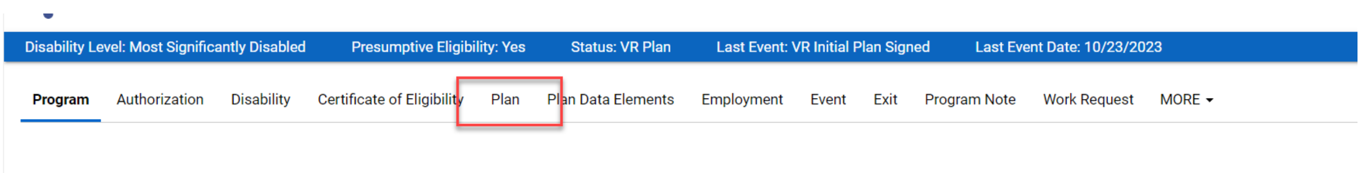


Figure 7-44 Plan Tab

2. The plan will display.

3. At the top of the plan form are three tabs: Plan (current form), Event, and Plan History. Click **Event**.

4. The Event Listing will display.

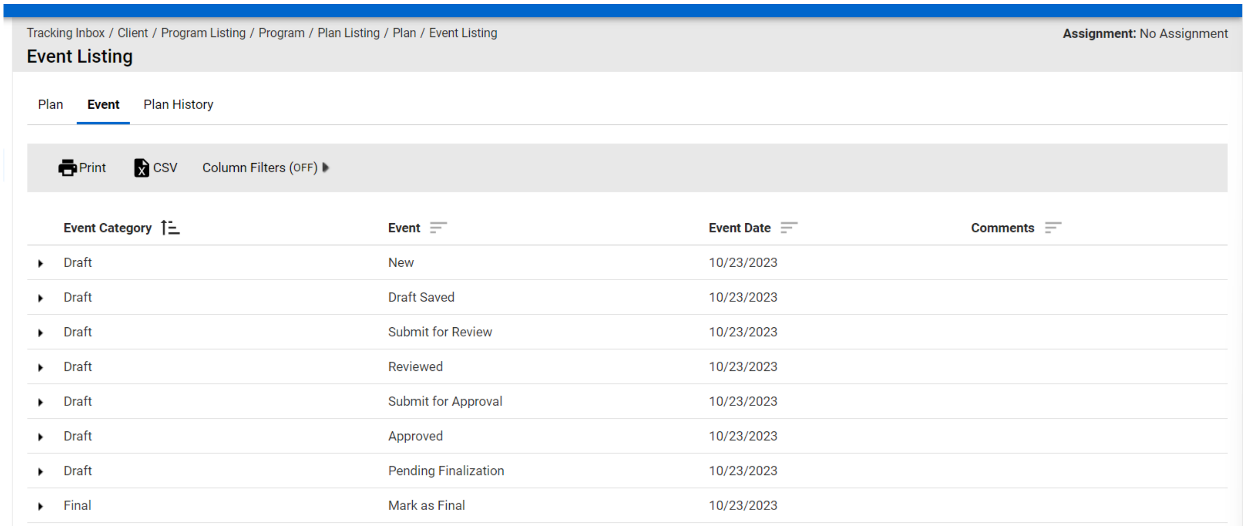


Figure 7-45 Plan Event Tab

5. Any of these listings can be clicked on. This will take the user to a new form where comments can be viewed in full for any of the Event records (if they've been entered).

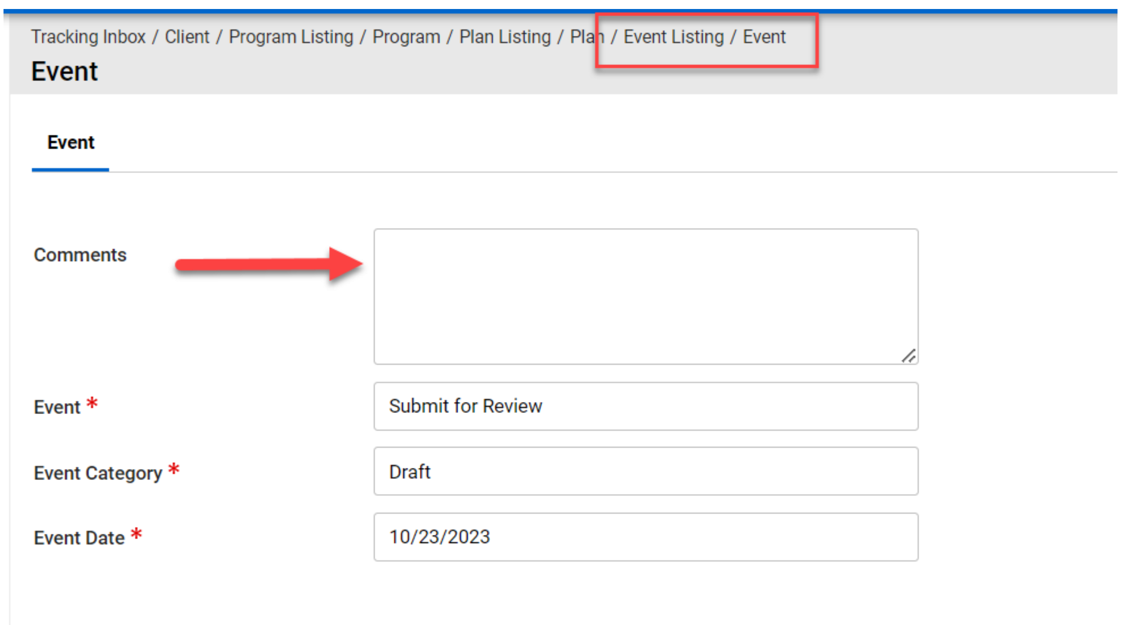


Figure 7-46 Event Listing Comments

8 Employment

8.1 Employment

Employment information is only collected for the Vocational Rehabilitation program and not for Potentially Eligible or Independent Living programs.

Features:

- Users can enter information for employment at three different stages of the Vocational Rehabilitation process.
- Users are provided with a link to the O'NET Online Reference to look up occupation information.

Business Rules:

- When a new Program record is created, three Employment records will auto generate for the three different Employment stages.
- Users will only be able to edit the three different employment records, they cannot add new ones.
- If the Employment at IPE record is updated the system also updates the Employment at Outcome record with the same info.
- If the Employment At Exit record is updated, then the Employment at Employment Outcome record is updated with the same info.
- User has the ability to update the Employment at Employment Outcome record at any time independently.
- Based on the Employment Status selected, certain fields on the form will become read only and not required for the user to fill out.

Employment data is entered at three stages:

- IX.C Employment at Initial Plan
- XVI. Employment at Employment Outcome
- XVII.D Employment at Exit

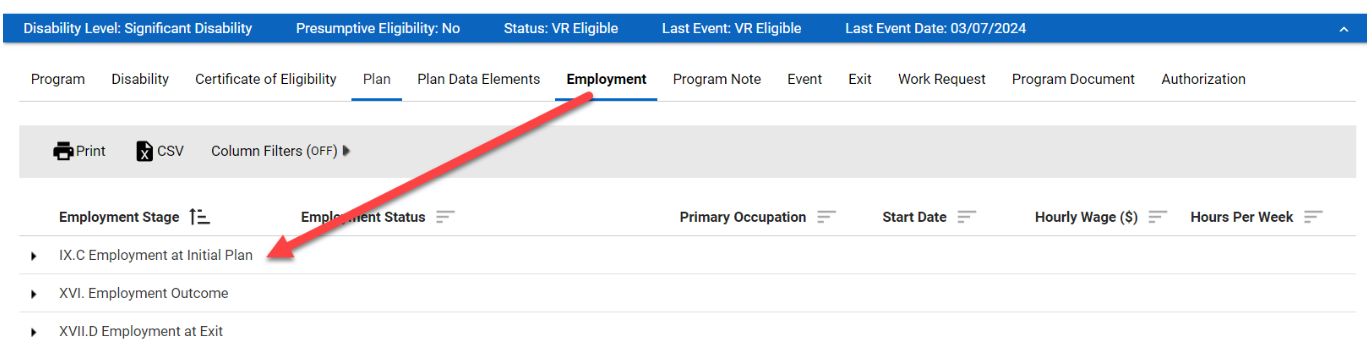


Figure 8-1 Employment Listing

8.2 Entering Employment at Initial Plan

1. Navigate to the specific client through **Search**.
2. When the client screen displays click on **Program** in the ribbon.

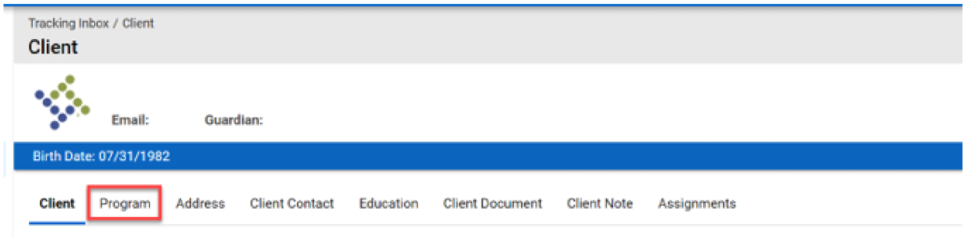


Figure 8-2 Program Tab

3. Choose the appropriate program for the client.
4. Click on the **Employment** tab on the top of the screen in the ribbon.

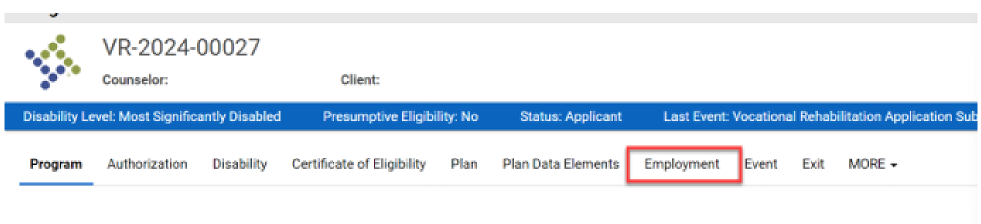


Figure 8-3 Employment Tab

5. The Employment screen will display and include the Employment at Initial Plan, the Employment Outcome, and Employment at exit.

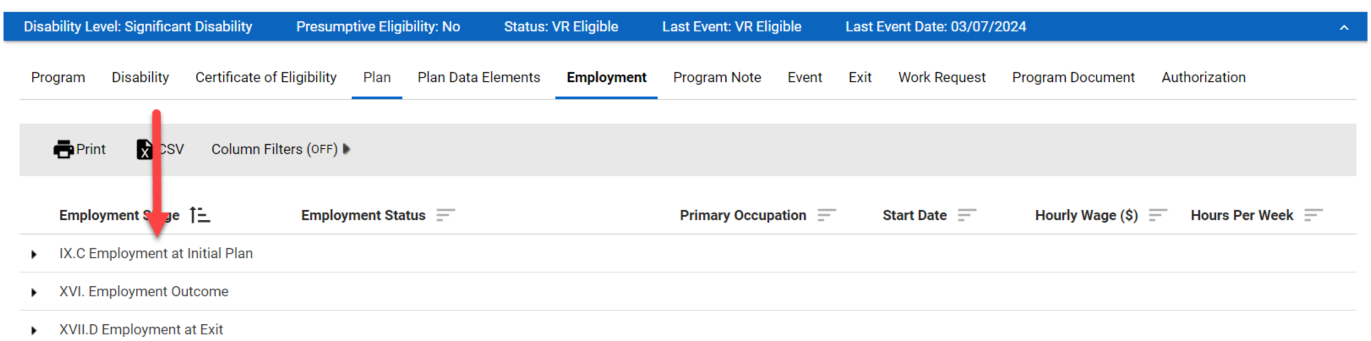


Figure 8-4 Employment Listing > Employment at Initial Plan

6. Clicking into any of these three items will display the Employment form.

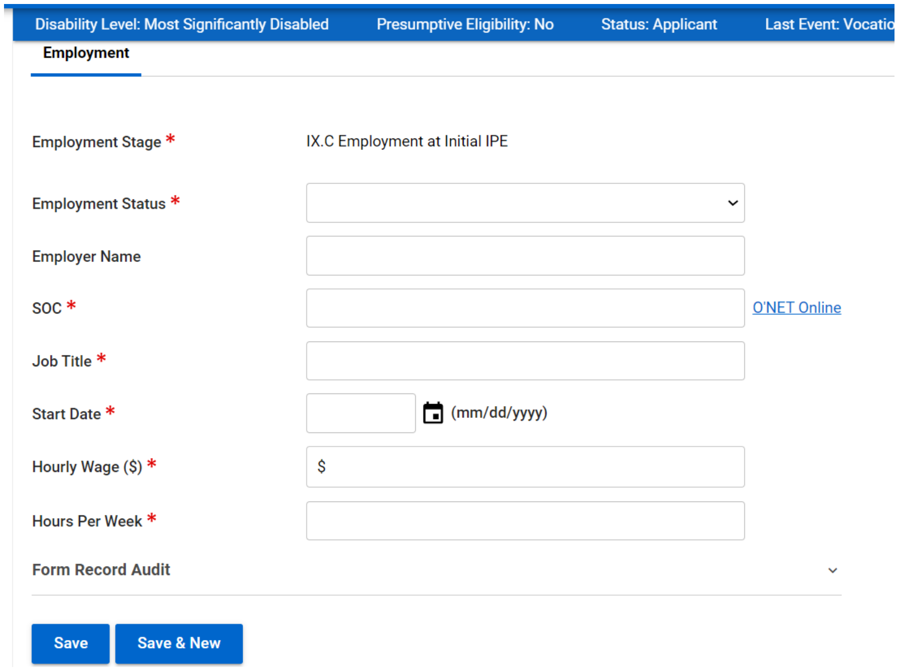


Figure 8-5 Employment at Initial Plan Form

7. On the employment form the required fields are marked. There is also a hyperlink to O*Net Online that when clicked will take the user to the O*New website in a different browser window to locate the needed SOC:

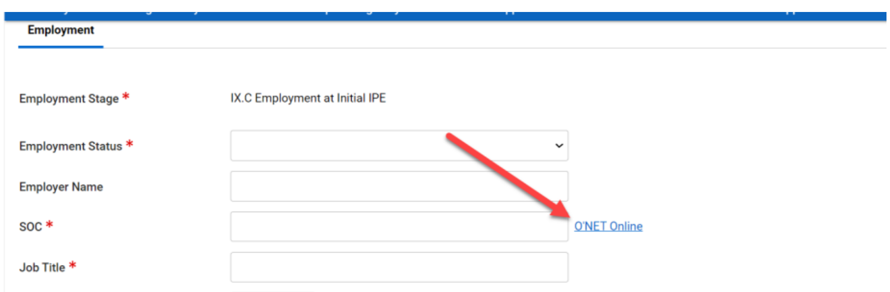


*Figure 8-6 O*NET Online Link on Employment Form*

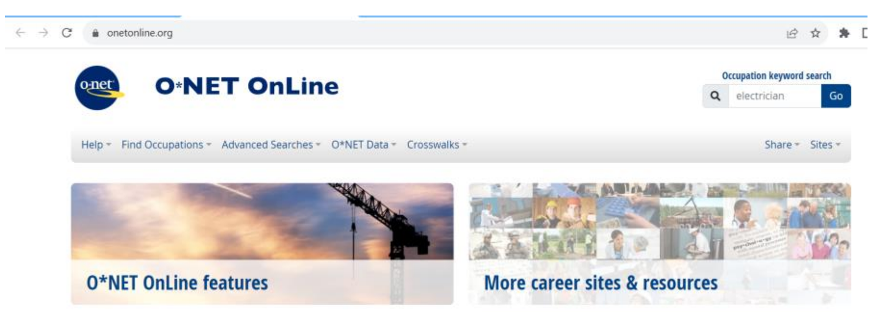


*Figure 8-7 O*NET Website*

8. Once the employment information is entered and **Save** is clicked the window will refresh and the employment listing will display.

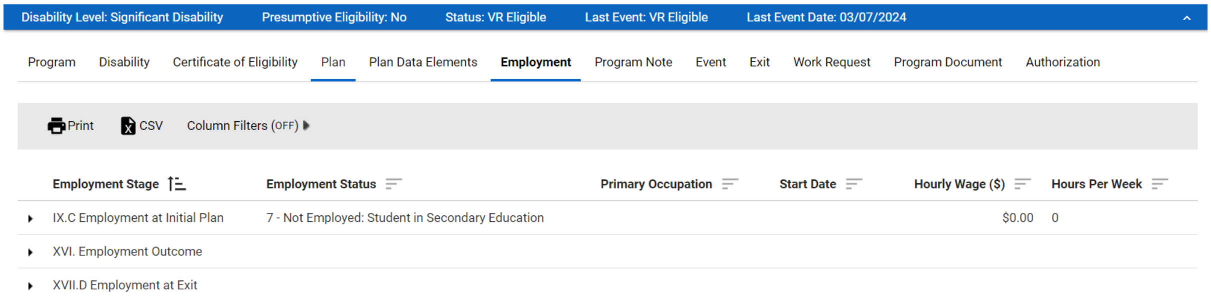


Figure 8-8 Employment Listing

9. Clicking into the employment record, the entered information will display and be read only.

8.3 Entering Employment at Employment Outcome

1. Navigate to the Employment tab just as done previously.
2. Click on **Employment Outcome**.

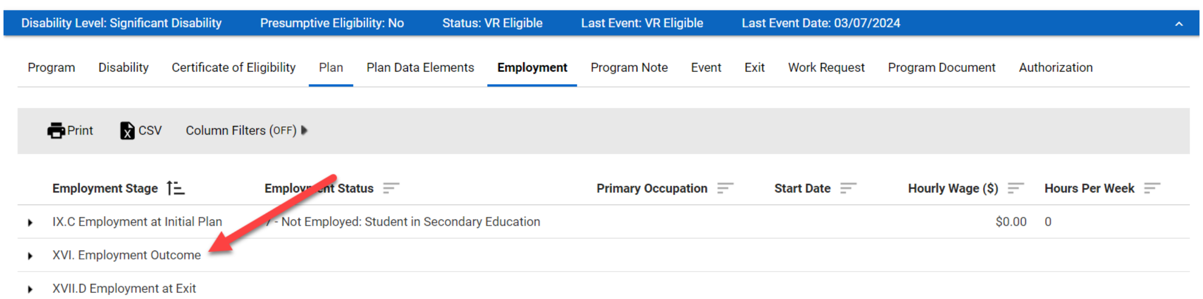


Figure 8-9 Employment Listing > Employment Outcome

3. The Employment Outcome form will display

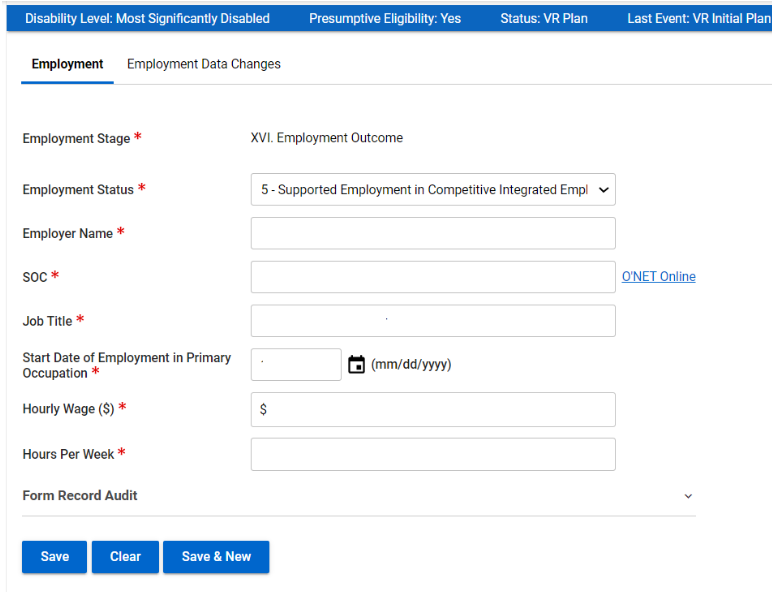


Figure 8-10 Employment Outcome Form

4. Enter in all required information and click **Save**.

There is a business rule built in where if Employment Status = 1-5, then the Type of Exit on the Exit tab must = 6.

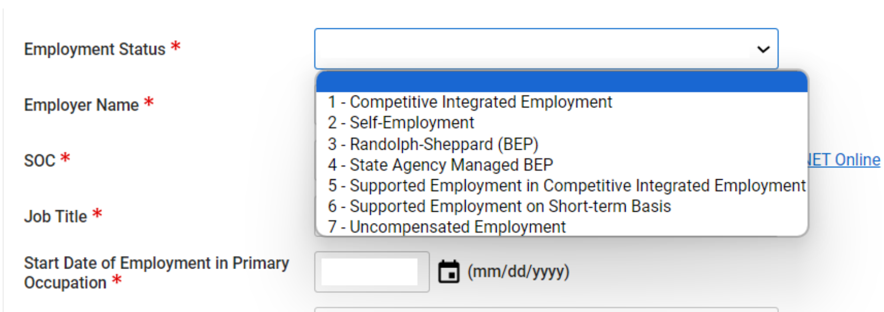


Figure 8-11 Employment Status Drop-Down

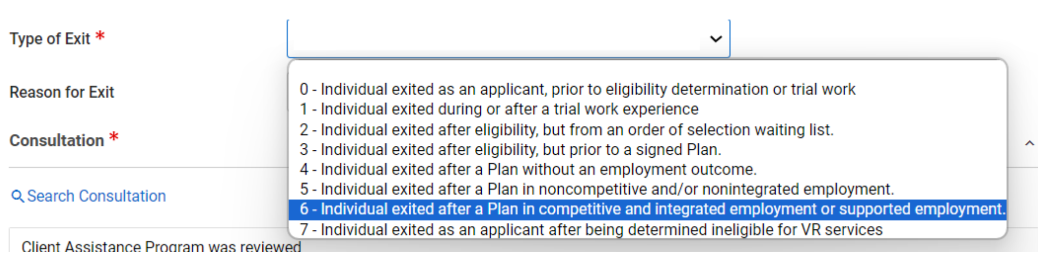


Figure 8-12 Employment Status on Employment Outcome Drop-Down on Exit

To view the history of any employment change, click the Employment Data Changes tab at the top of the Employment Outcome form:

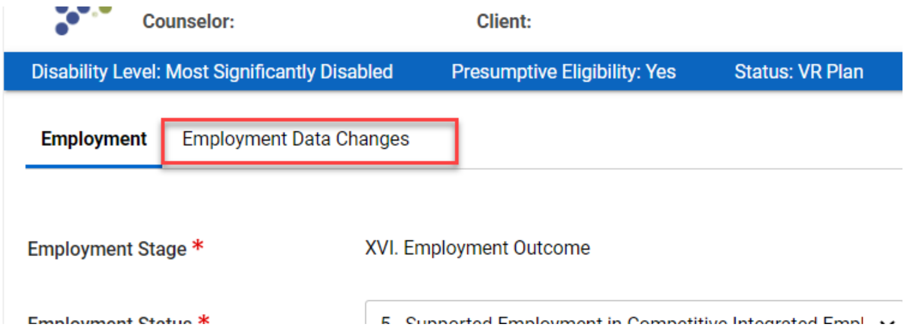


Figure 8-13 Employment Data Changes Tab

The Data Changes will display including who made the change, when it was completed and what data element was changed

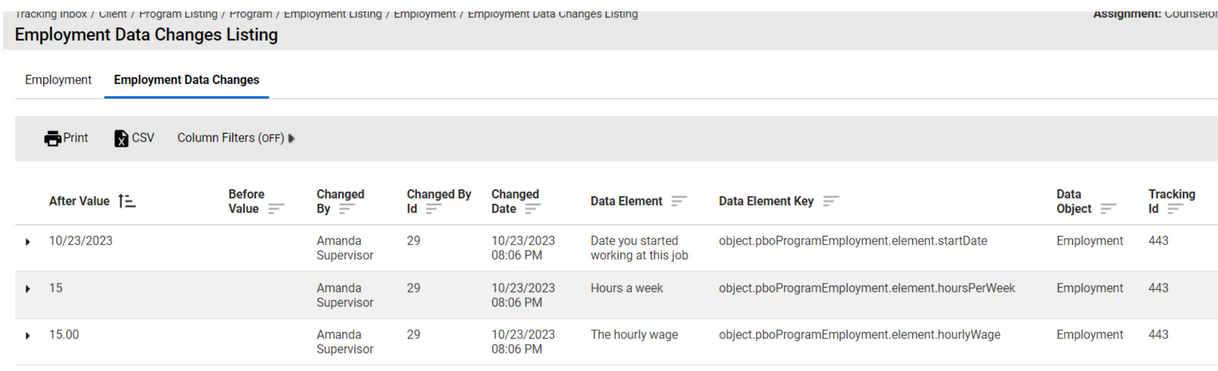


Figure 8-14 Employment Data Changes Listing

.

8.4 Entering Employment at Exit

1. Navigate to the Employment tab just as done previously.
2. Click on Employment at Exit.

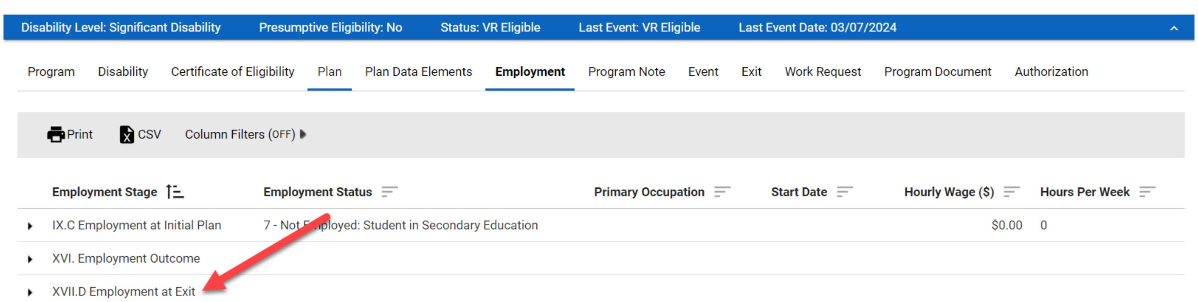


Figure 8-15 Employment Listing > Employment at Exit

3. The Employment at Exit form will display

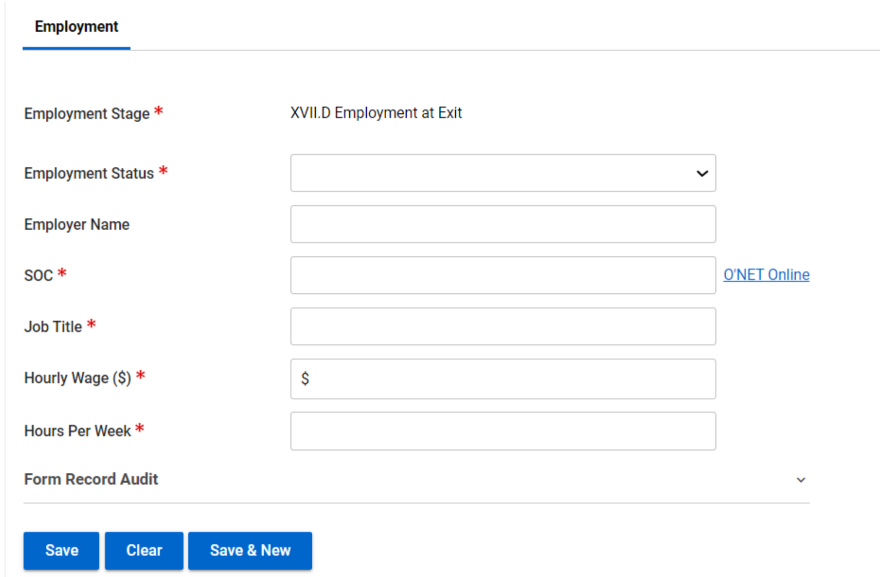


Figure 8-16 Employment at Exit Form

4. Enter in all required information and click **Save**.

Reminder if Employment Status = 1-5 on Employment Outcome, then the Type of Exit on the Exit tab must = 6.

All Employment Records will display on the Employment Listing screen.

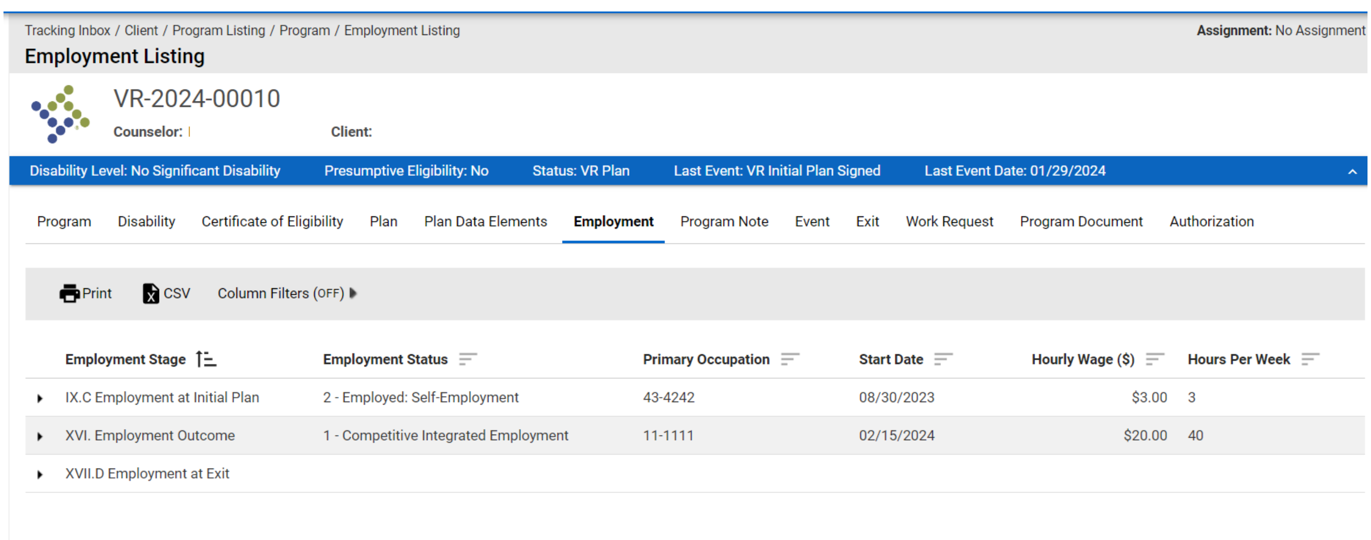


Figure 8-17 Employment Listing

8.5 Entering Employment on the Quick Menu

To enter employment information without navigating off the screen the user is currently on; they can use the quick menu to enter this information.

1. Click the **Quick Menu** in the top left of the screen.

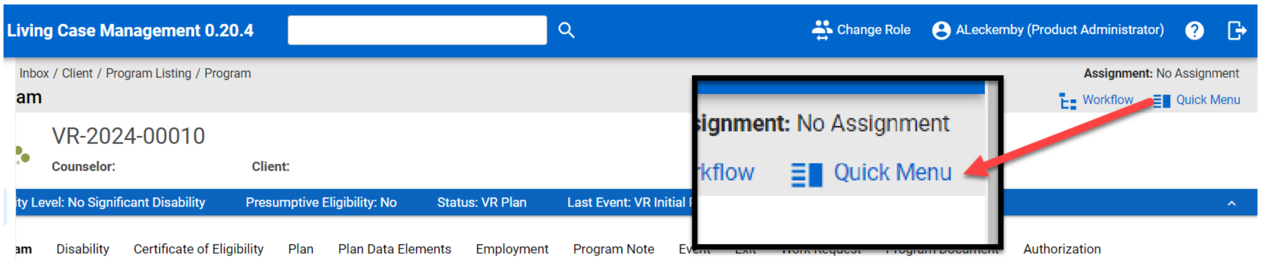


Figure 8-18 Quick Menu Location

2. The Quick Menu will expand, click the **Employment** tab.

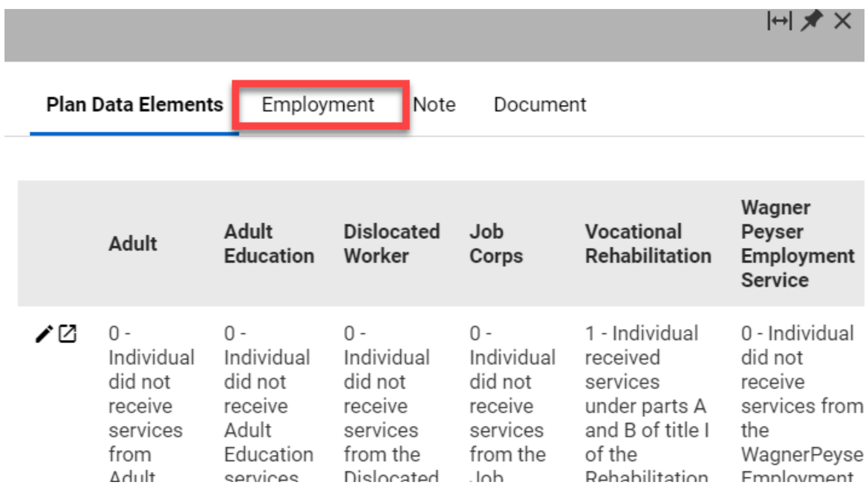


Figure 8-19 Employment Data Elements on Quick Menu

3. The three different Employment stages will display

4. Just as with the Employment tab not on the quick menu the information can be added. Click on the **Pencil icon** near whichever record needs to be added.

Note: The icon (square with an arrow pointed top right) next to the pencil will open this tab in a new window.

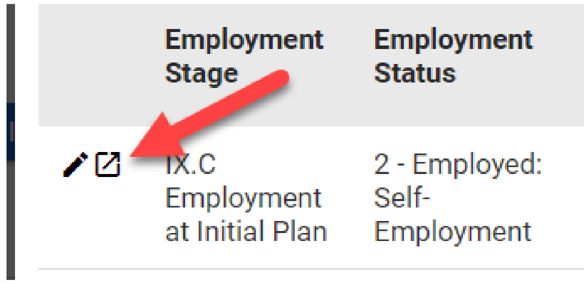
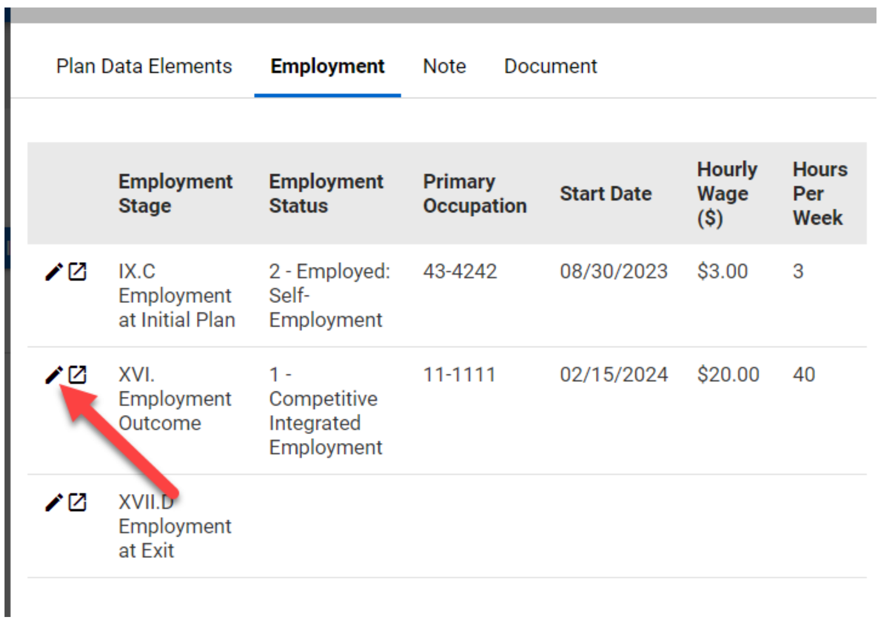


Figure 8-20 Open New Window Icon



	Employment Stage	Employment Status	Primary Occupation	Start Date	Hourly Wage ($)	Hours Per Week
	IX.C Employment at Initial Plan	2 - Employed: Self-Employment	43-4242	08/30/2023	$3.00	3
	XVI. Employment Outcome	1 - Competitive Integrated Employment	11-1111	02/15/2024	$20.00	40
	XVII.D Employment at Exit					

Figure 8-21 Edit Icon on Quick Menu > Employment

5. The form will display just as before; enter the required information and click **Save**.

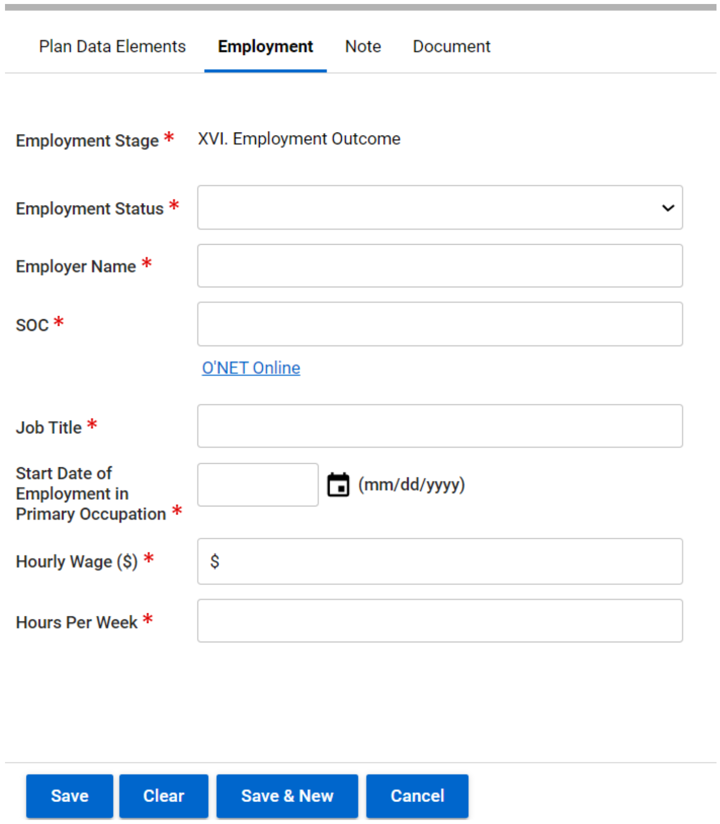


Figure 8-22 Employment Form on Quick Menu

9 Authorizations

Authorizations provide an authorization for services to be provided to a client in the Vocational Rehabilitation Programs. The Authorization tab allows users to add authorizations to a Program record to track and record services needed by that participant to ensure their success in Vocational Rehabilitation programs.

Authorizations can be created from a client's plan or directly from the Authorization Tracking Inbox.

Features

- Authorizations entered directly from the Tracking Inbox are independent from authorizations created directly from a Plan. Users do have the option when creating a Plan to link Authorizations created from the Authorization tab to a Plan.
- All Authorizations associated with that Client plan will display on this form for easy viewing.
- Authorizations must proceed through a two-factor approval process before it is considered Issued and budget dollars can be encumbered for it.

Business Rules

- The 'Provider' drop-down information comes from the 'Provider BTO, Service Category field.'
- Live Search is used to locate the providers who perform the services listed in the Service Category by filtering for Providers that perform the services and match on the partial name entered.
- Authorization Numbers auto generate after an Authorization is created.
- Total Amount Encumbered to Date, Total Billed to Date, Total Paid to Date and the Remaining Balance do not display on Create New, the fields only display after an Authorization has been created.
- Total Billed to Date populates from the Payment tab when the payment status is not Draft and not Cancelled. It is the sum of all these payment records. Anytime the payment status of a payment changes then this amount is recalculated.
- Total Paid to Date populates from the Payment tab when the payment status = Final Paid. This is the sum of all payment records that have a status of Final Paid. Anytime the payment status changes to Final Paid then this amount is recalculated.
- If Client Pay = Yes, then Provider is not required. If Client Pay = No or blank, then Provider is required.
- When an Authorization is created from the Program tab:
  - The 'Office' populates with the Office from the Program.
  - 'Authorization Entered By' populates with the Counselor from the Program.
  - 'Client' defaults to the Client from the Client tab.
  - The related Plan is associated with the Authorization.

- When an Authorization is created directly from the Tracking Inbox (Authorization BTO), an Office must be selected. The Authorized By field will filter to only show Staff users who are associated with the Office from the Staff tab.
- When an Authorization is created from a Plan:
  - The 'Office' populates with the Office from the Program.
  - 'Authorization Entered By' populates with the Counselor from the Program.
  - 'Client' defaults to the Client from the Client tab.
  - The related Plan is associated with the Authorization.
  - When Plans are moved into Plan History, the association with the Authorization is updated accordingly.
- Authorization Amount - when an Authorization is created from a Plan, the Authorization Amount cannot be greater than the Plan Budget on the Plan, and can't exceed the difference between the Plan Budget and the sum of all other open Authorizations associated with the Plan.

Notes:

- Some services are restricted to plans ONLY (Auth created from the Plan)
- Some services are NOT restricted to plans only (Auth created NOT from a plan)
- Some individuals may not have a plan for example, Potentially Eligible, but require Authorizations for Services
  - Authorizations for this type of client are created from the Tracking Inbox. A Live Search is used to locate client by filtering as the user types their name.

9.1 Authorization

9.1.1 Creating an Authorization from the Program Tab

Support Staff or Case Manager can create an Authorization. This will follow the most direct path through the workflow to get the Authorization to a Status of Issued.

A Supervisor can create an Authorization however, they cannot approve an Authorization they have created; it will need to be approved by a different Supervisor.

1. Login with your system provided account and navigate to a client whose plan requires an **Authorization** to be completed.

2. From the Client screen using the top menu navigate to **Program**, when the Program listings display choose the appropriate Program for the client.

3. When the **Program Information** form displays, choose **Authorization** in the top ribbon:

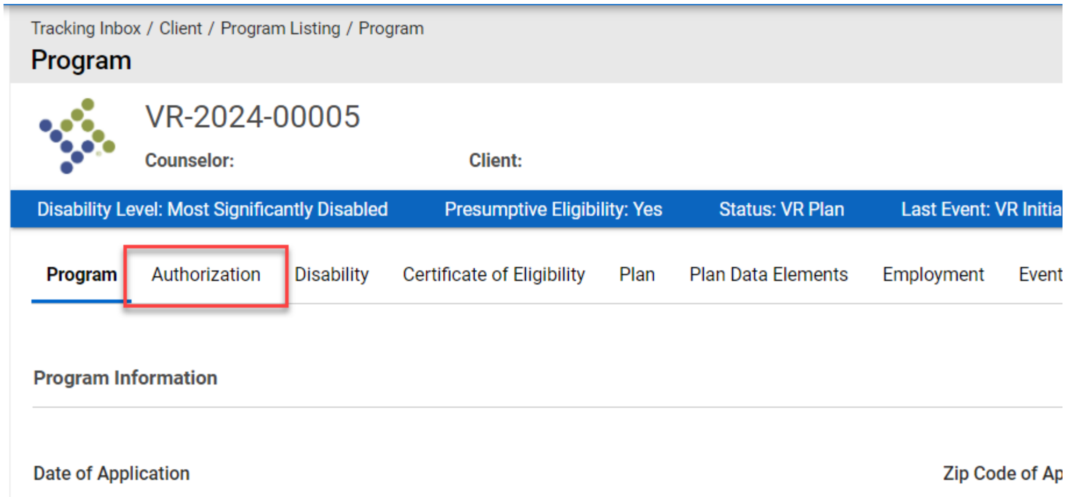


Figure 9-1 Authorization Tab

4. The Authorization listing will display; click **+New** under **Authorization** but above the listing section:

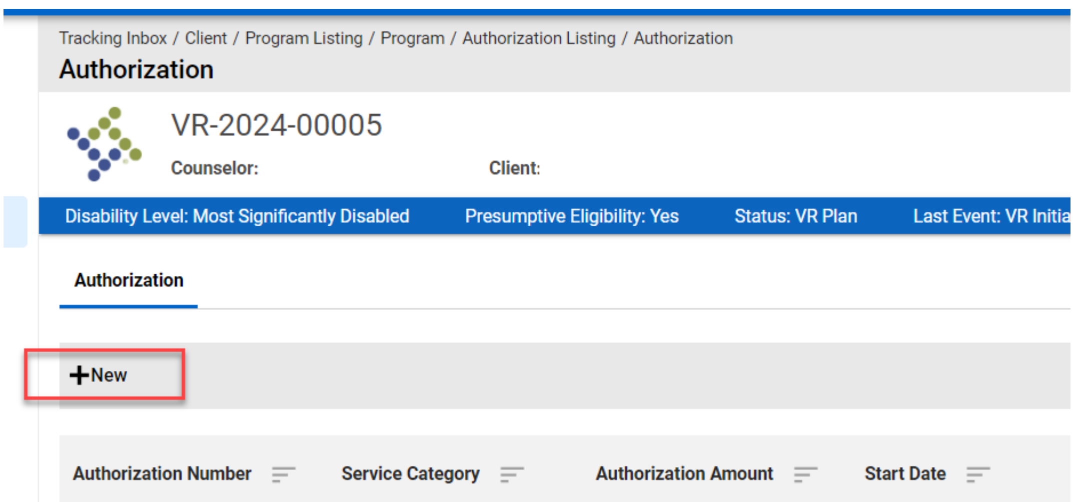


Figure 9-2 Authorization > +New

5. The **Authorization** form (New Authorization) will display.

6. There are 4 sections on this form: Authorization, Service Category, Service Details and Workflow Actions.

7. The version number, like the plan, will reflect which iteration of the Authorization it is. For this example, this is a new Authorization so it will reflect Version Number 1. If the Authorization is amended in any way the number will update accordingly (1, 2, 3…).

8. The office will default to Iowa Department for the Blind.

9. The **Authorized By** drop down is a required field and will include any individual who has the permissions to create an authorization.

10. The **Authorization Entered By** field will auto-populate to the user creating the Authorization. This field is read only and cannot be modified.

11. The **Client Name** is auto populated on the screen and is read only. There is a hyperlink next to the Client name to navigate back to the client's program.

Note: If the user has filled anything out on the Authorization form and has not clicked save and navigates using the hyperlink to View Program, any information entered will be lost.

12. **Program Type** is a required field; this is a drop-down selection.

13. The following fields are on the form in the Authorization section and are not required yet: Federal Fiscal Year, Budget Type, Budget, Budget Description, and Accounting Code.

14. The next section is the Service Category. Click **Search Service Category** to get the multi-select to display:

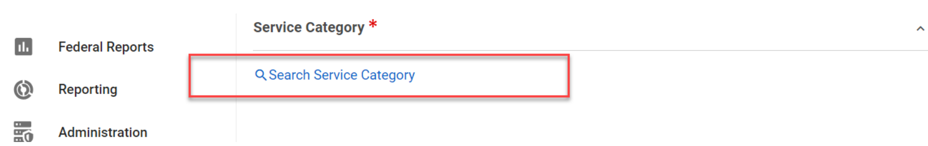


Figure 9-3 Search Service Category

15. The Services will display all service categories that are available for the client:

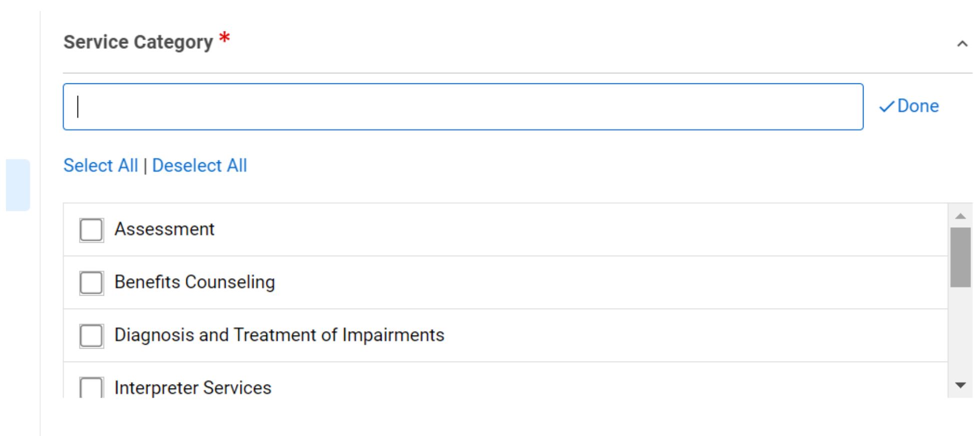


Figure 9-4 Service Category Options Multi-Select

16. Below Services is the Client Pay buttons, Yes/No, this is not required.

17. The next field is the **Provider** field; this field is required. To enter the **Provider**, click the **magnifying glass** to the right of the field:

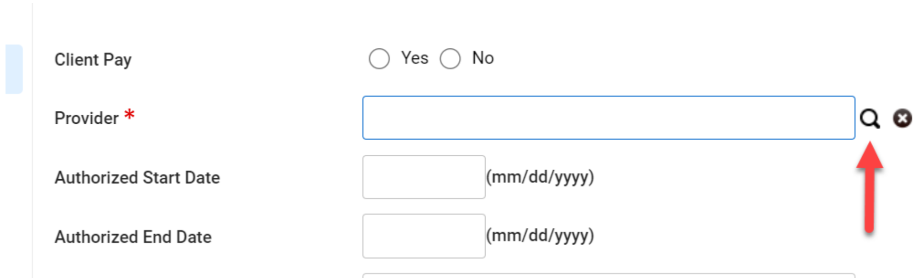


Figure 9-5 Provider Search

Note: You will not be able to click directly into the field until the magnifying glass is clicked on.

18. Once the magnifying glass (JAWS may announce the magnifier as 'link') has been clicked on the field will change slightly and a cursor will display inside:

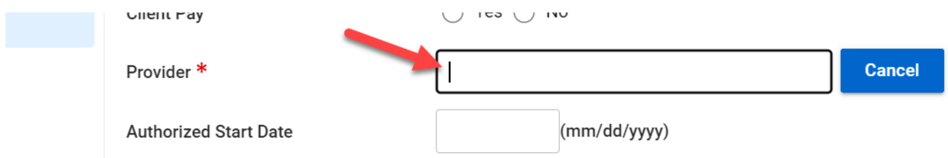


Figure 9-6 Provider Field Once Magnifier is Selected

19. Begin typing the **Providers** name in the field.

Note: This will only populate based on Providers who have been entered into the system under the Tracking Inbox > Provider > +New Provider and have the services assigned to them that were provided to the client. When typing, if the Provider is not populating it will need to be confirmed the provider has been set up previously and correctly.

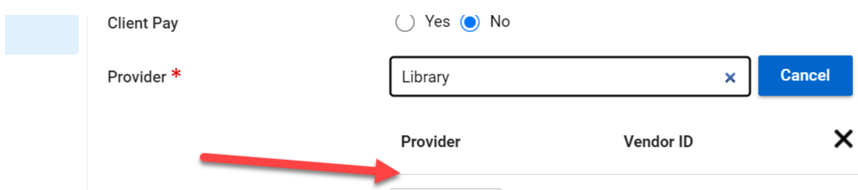


Figure 9-7 Provider Field

When a provider has been set up, upon typing it will display the Providers who match what is being typed; these will display under the **Provider listing** header:

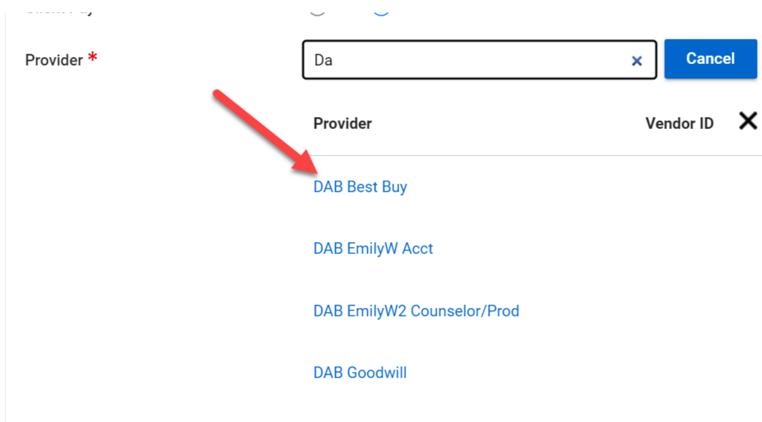


Figure 9-8 Provider List Populates

20. The remaining fields on the form are not required yet: Authorized Start Date, Authorized End Date, Authorized Amount, (Under Service Details) Services Notes and Description.

21. Once all the required fields have been entered the **Save** button can be selected but the Authorization will be in a **Draft status** (this is helpful if the user is not ready to submit the Authorization yet and does not want to lose work).

Note: Upon clicking **Save**, the Authorization will update to a Status of Draft, will have an auto-populated Authorization Number. The Version Number, Office, Authorized By, and Authorized Entered By Fields are now read only. The Authorized Amount and fields below it are also read only.

Note: Once the Authorization will be triggering Workflow Actions some of these fields will become required (steps to come).

Once the Authorization has been saved, the user can navigate away from this form if needed. To come back follow previous navigation steps to the Authorization listing. The Authorization will display:

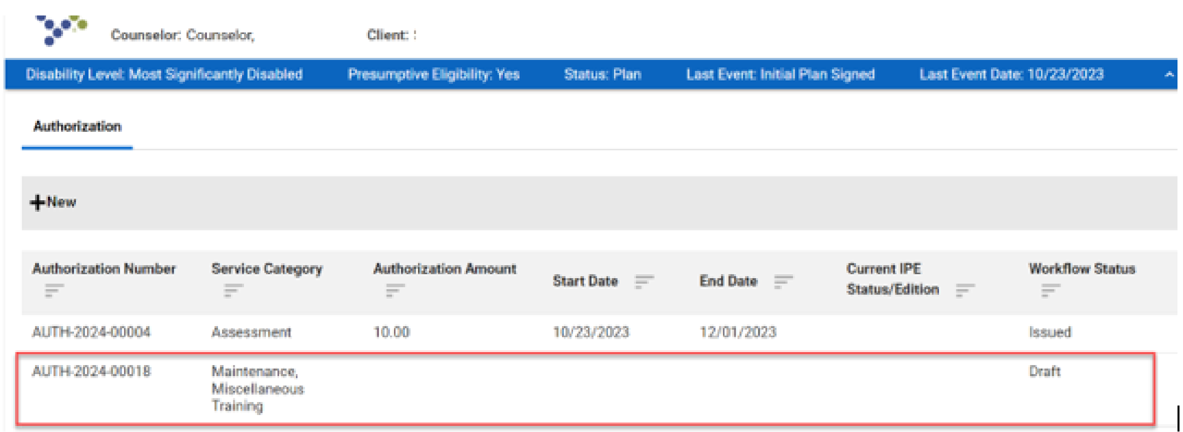


Figure 9-9 Authorization Listing

22. The bottom buttons have updated to include a Clone Authorization button. In the event a client will be receiving another Authorization (or even multiples) the one Authorization can be cloned to prevent multiple data entry requirements.

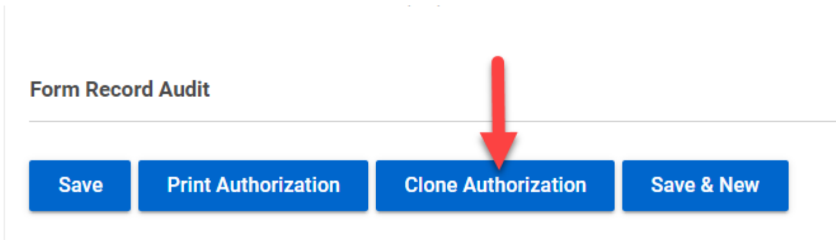


Figure 9-10 Button Added to Form

23. **Revisiting step #20**. When the Authorization is ready to be approved a **Workflow Action** needs to be selected and the Case Manager needs to sign however, for the Authorization to move forward for approval some of the fields that were not previously required to save are now required to progress (Authorized Start Date, Authorized End Date, and Authorized Amount). If not populated the Workflow Messages (errors) will display:

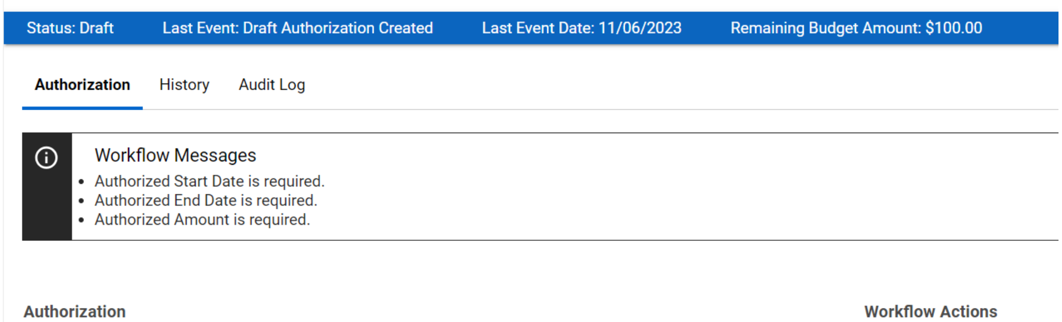


Figure 9-11 Workflow Message

24. Navigate to the newly required fields and populate the information.

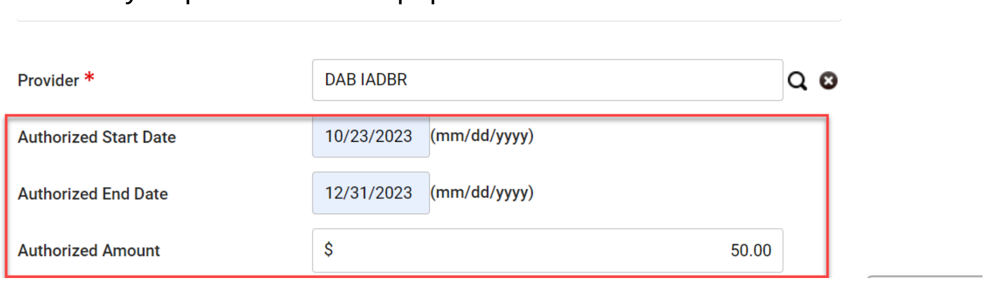


Figure 9-12 Authorization Start and End Date Fields

25. After the required fields have been populated. Navigate to the right side of the screen where **Workflow Actions** is located (this will only display AFTER Save has been selected). Select the drop-down and click **Submit for Review/Approval**.

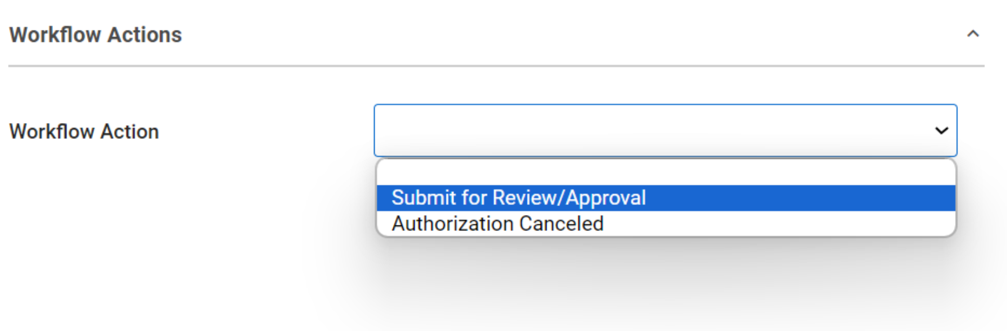


Figure 9-13 Authorization Workflow Actions

26. A new drop-down will display on the screen: **Send for Review/Approval**. This drop-down will have any user who can approve an Authorization.

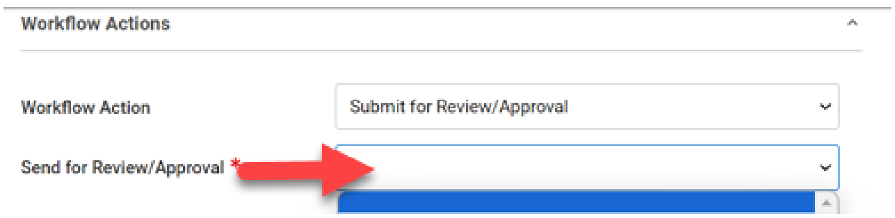


Figure 9-14 Authorization Approver List

27. Choose the **approver**:

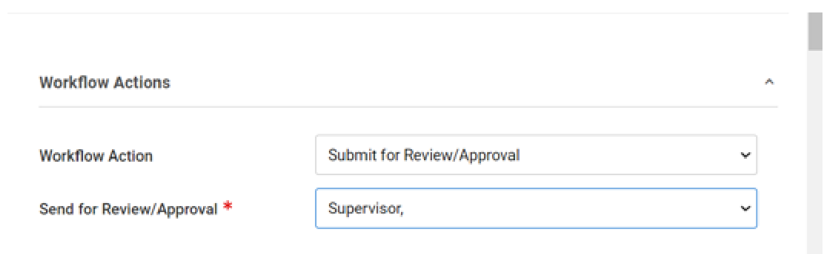


Figure 9-15 Approver Selection

28. Scroll to the bottom of the Authorization form; a new section of **Signatures** is displaying which has the **Counselor Signature** field and is required:

Figure 9-16 New Signature Field

29. The Case Manager creating the authorization will click the **pencil icon** (JAWS announces this as 'Signature') to the right of the **Counselor Signature** label and the password entry pop-up will display:

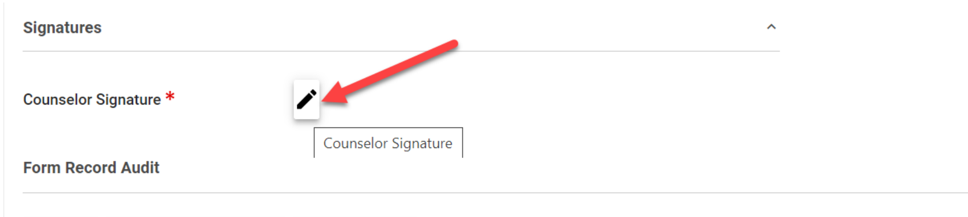


Figure 9-17 Entering Signature

Upon click:

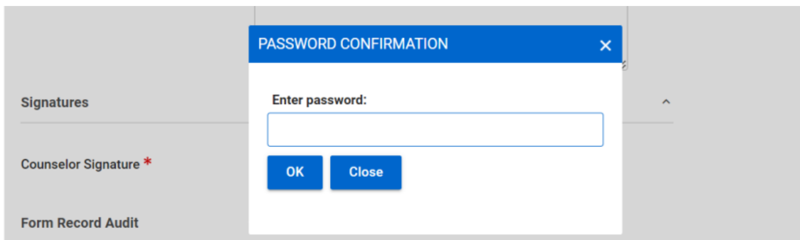


Figure 9-18 Entering Password

30. Enter your **user password** (this is the same password you enter upon login).

31. The Case Managers name will populate on the screen and will also include the time and date stamp of when the signature was entered. This field becomes read only.

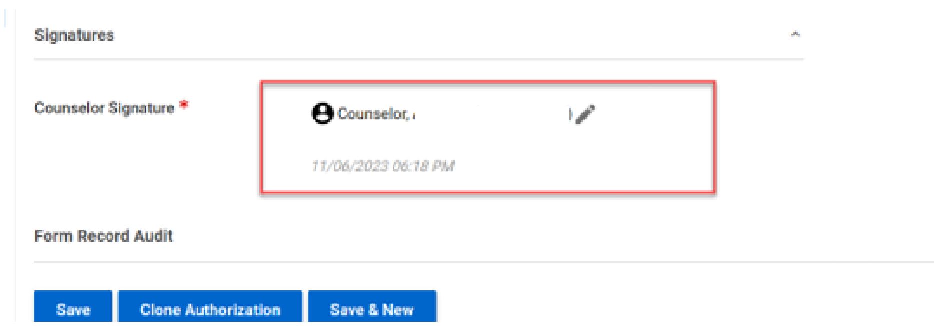


Figure 9-19 Case Manager Signature

32. Click the **Save** button at the bottom of the screen. The screen will refresh. The Authorization will now reflect the Authorization Status as **Draft Pending Review/Approval**. The Send for Review/Approval will also display who the Authorization was sent to for approval as read only:

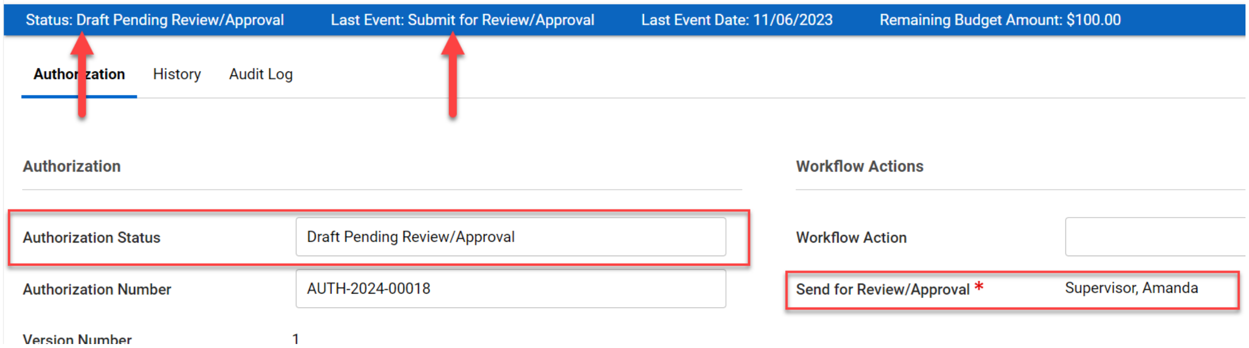


Figure 9-20 Authorization Status

Note: In the blue ribbon at the top of the form the Status is also visible there as well as the Last Event for the Authorization.

33. Once the Authorization has been sent for approval the user who will be reviewing/approving will receive an email alerting them of the Authorization.

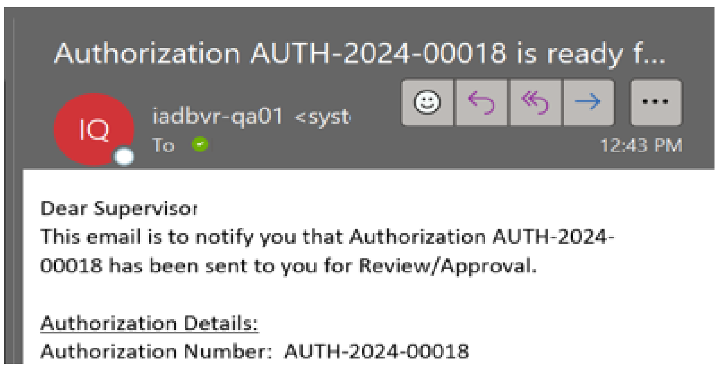


Figure 9-21 Email Notification for Authorization Approval

34. For these next steps: A Supervisor is required to complete the Authorization workflow.

35. Navigate to the client's **Authorization**. This can be done a few different ways. One way was mentioned previously by locating the client, going through program then to the **Authorization** tab. The Authorizations can also be located through the Supervisor queues located on the left side of the screen.

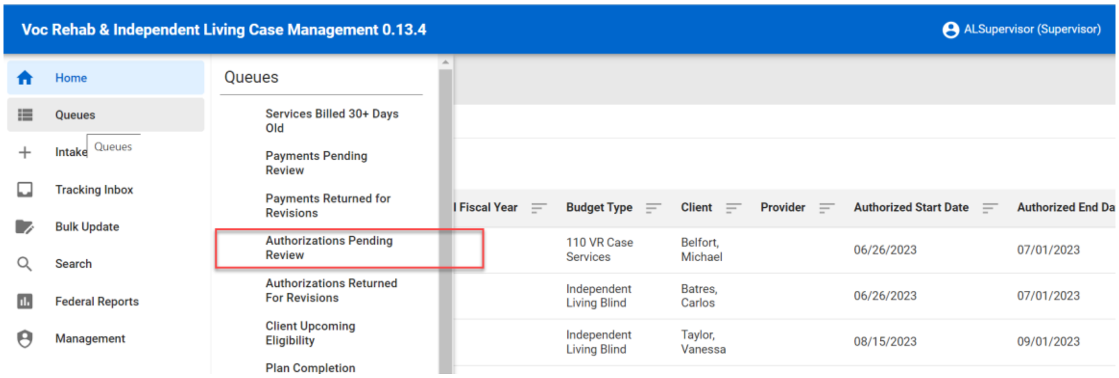


Figure 9-22 Supervisors Queue > Authorizations Pending Review

36. Clicking the **Authorizations Pending Review Queue** will display all the Authorizations that are pending review for the specific supervisor.

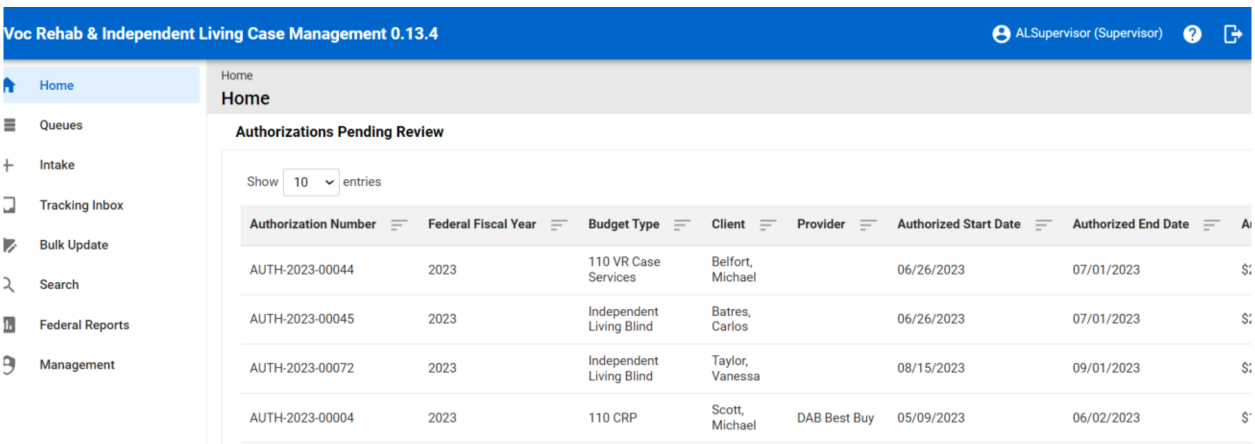


Figure 9-23 Authorization Pending Review Queue Listing

37. Locate the **Authorization** and click it:

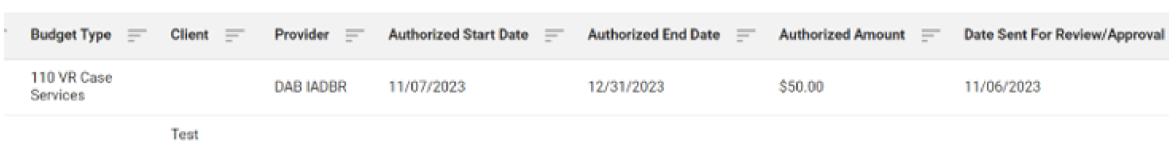


Figure 9-24 Authorization Pending Approval

38. As the Supervisor reviewing the Authorization, if it looks good, navigate to the **Workflow Actions** section. Click the **Workflow Action drop-down** and select **Draft Authorization Approved**:

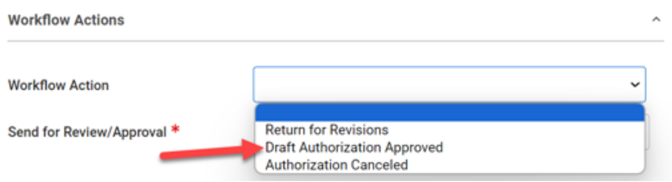


Figure 9-25 Workflow Action

Note: There are two additional options (these will be covered later):

- Return for Revisions
- Authorization Canceled

39. Scroll to the bottom where the signature section is located and click the **pencil icon** (JAWS announces this as 'Signature') to the right of **Reviewer Signature**:

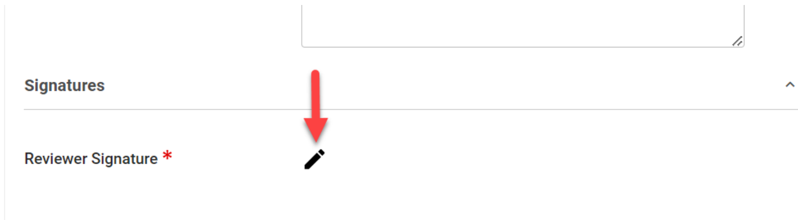


Figure 9-26 Review Signature

40. Like before the Password Prompt will display, **enter password** (same password as used to login):

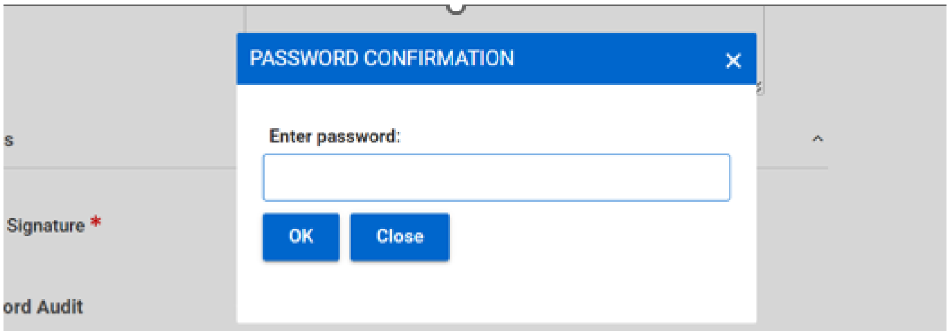


Figure 9-27 Password Confirmation

41. Scroll to the bottom and click **Save**.

42. Once save has been clicked the screen will refresh. In the blue banner at the top of the screen the Status of the Authorization will reflect **Issued** with the Last Event being **Draft Authorization Approved**. It will also reflect the Remaining Budget Amount (if payments have been applied to this authorization the balance remaining will update).

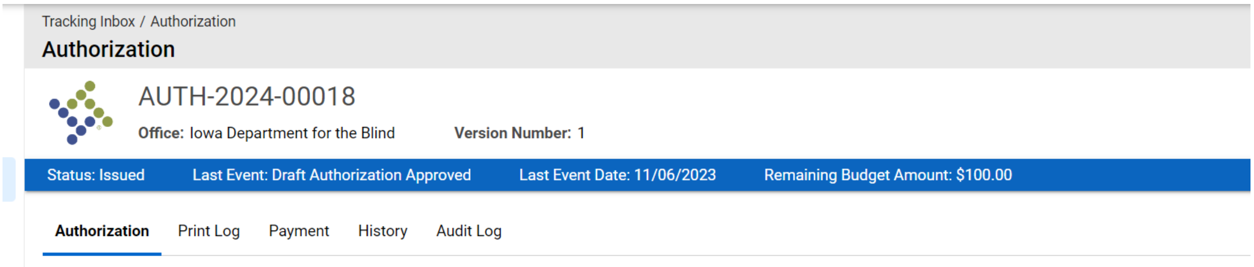


Figure 9-28 Authorization Status = Issued

43. The Case Manager who created the Authorization will receive a notification email showing that the Supervisor has approved the Authorization:

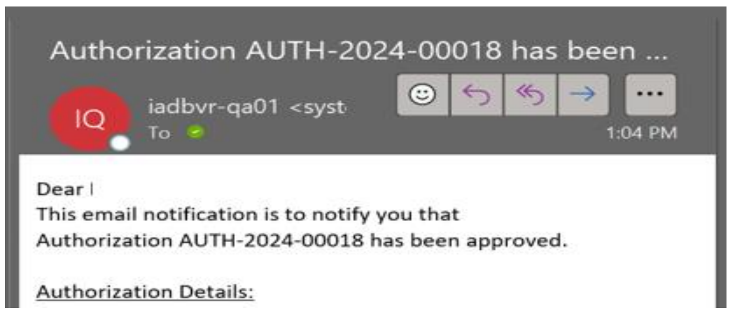


Figure 9-29 Email Notification of Approved Authorization

44. The Authorization can be printed now, if required/requested. Scroll to the bottom of the screen and a new button displays: **Print Authorization**

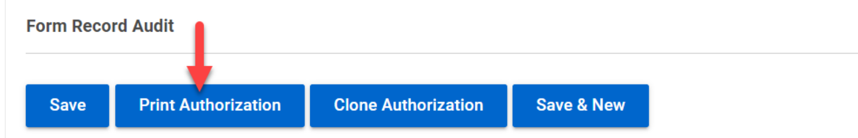


Figure 9-30 Print Authorization Button

45. When **Print Authorization** is clicked a PDF is generated; this can be saved to your computer or printed to paper.

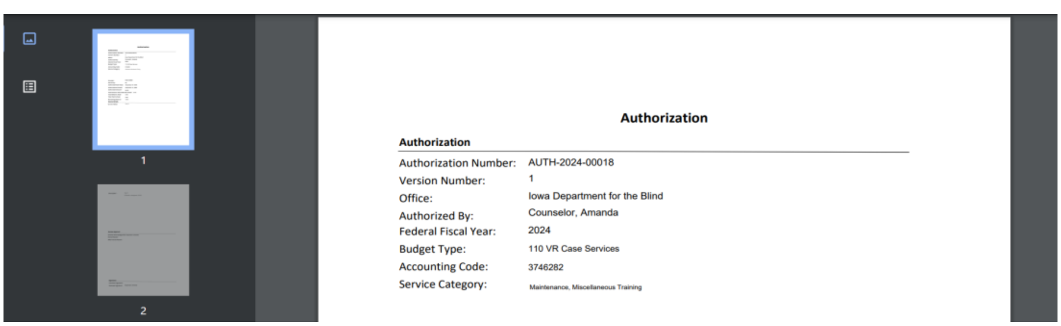


Figure 9-31 Authorization PDF Document

46. At the top of the screen near the blue banner are some additional tabs. Next to the main Authorization tab (where you are currently) are the Print Log, Payment, History and Audit Log tabs.

47. Click the **Print Log** tab. This will display each time the Authorization has been printed (the Print Authorization button has been used), which user printed it and when:

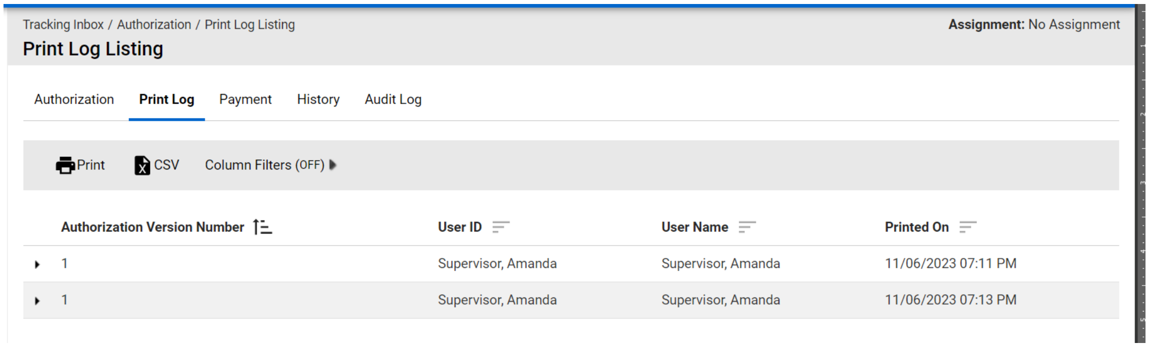


Figure 9-32 Authorization Print Log Tab

48. The **Payment** tab will display any payments that have been applied to the Authorization. Currently in this example we have not applied any payments however, this is where they would appear in a listing:

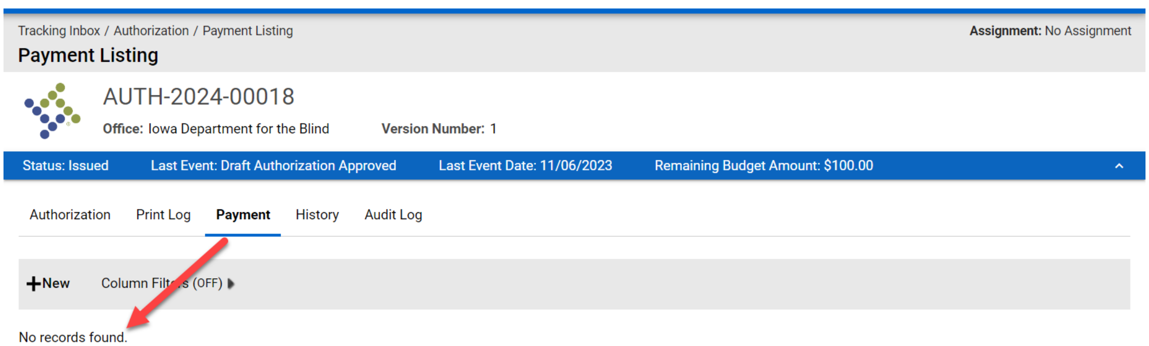


Figure 9-33 Payments Applied to Authorizations Tab

49. The **History** tab will display the **Events of the Authorization**, whether it was approved, returned for revisions, cancelled, etc.

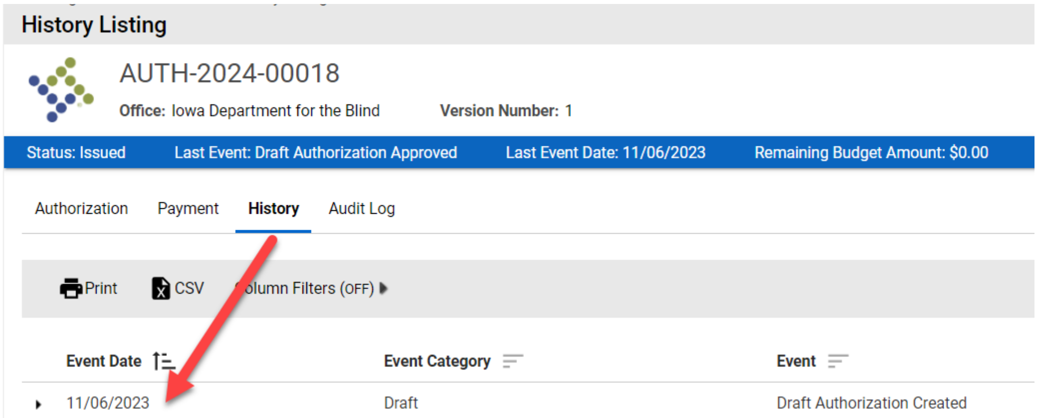


Figure 9-34 Authorizations History Tab

50. The **Audit Log** tab will display a full list of everything that occurred on the Authorization from start to finish and who did it:

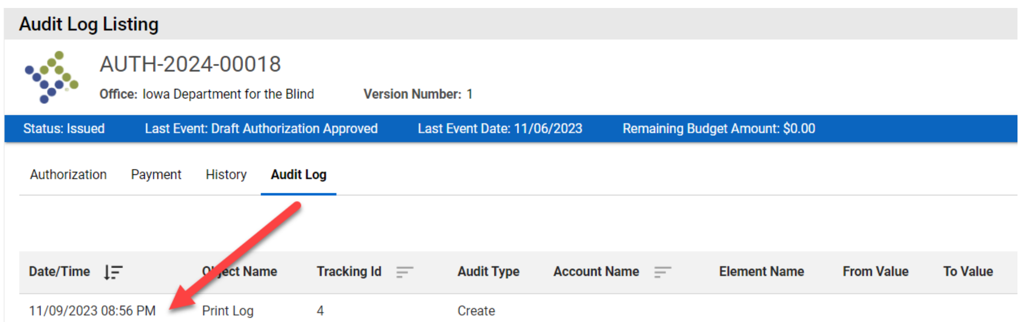


Figure 9-35 Authorizations Audit Log Tab

9.1.2 Creating an Authorization from the Tracking Inbox (NOT on a Plan).

For this example, logging in as a Case Manager and will follow the most direct path.

1. Login with your system provided account and navigate to the **Tracking Inbox** on the left side of the screen, when the menu expands choose **Authorization**:

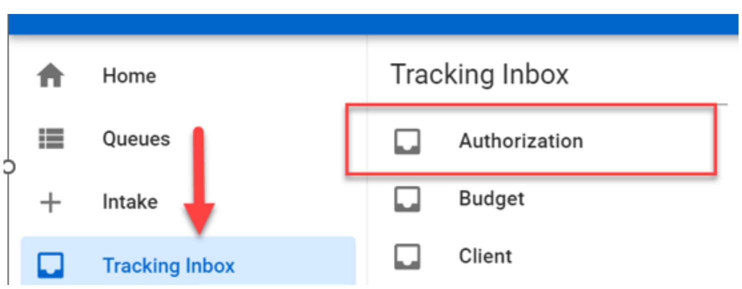


Figure 9-36 Authorization from the Tracking Inbox

2. When the **Tracking Inbox** opens Authorizations that are visible to the user (if any) will show:

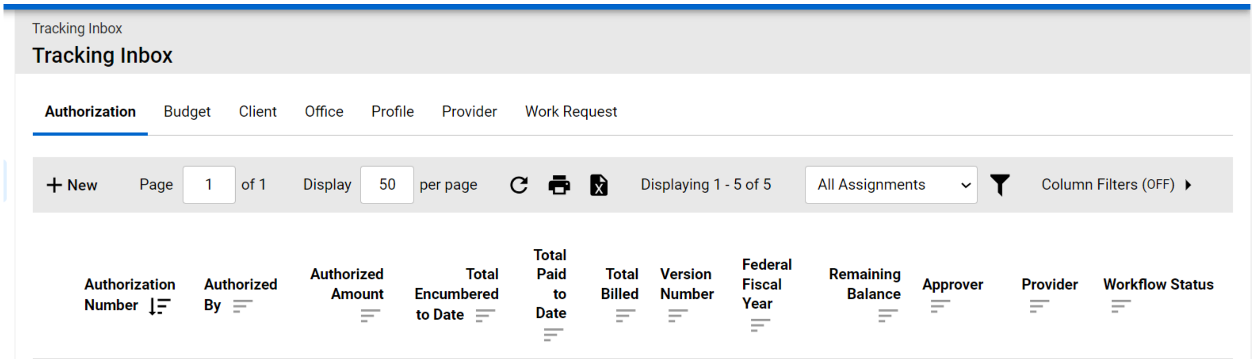


Figure 9-37 Tracking inbox > Authorization

3. Click **+New** near the top of the screen:

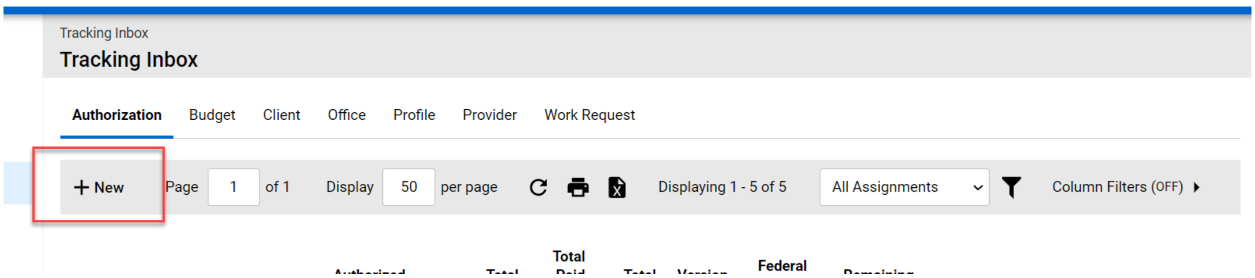


Figure 9-38 Tracking inbox > Authorization click +New

4. Similar to the previous steps fill in the required fields on the form.

Note: Because this Authorization is not being created from the Plan you will have to search for a client to link it to.

5. Near the client field there is a **magnifying glass** (JAWS may announce this as 'Link'), just like with Provider, click the **magnifying glass** then it will allow you to type in the field:

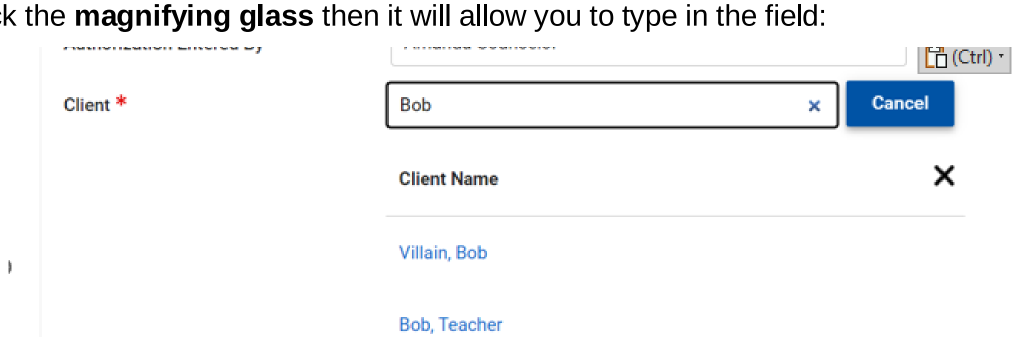


Figure 9-39 Client Search Field

6. Continue through the fields, to prevent errors, fill in each field (not only required). Be sure to populate the **Service Category** (expanding the multi-select and selecting the services needed).

7. Once all the fields have been populated click the **Save** button at the bottom of the form. The Authorization will be saved in **Draft** status.

8. Just like before, to move the Authorization through the workflow the **Workflow Actions** needs to be completed. In the **Workflow Actions** drop-down click on **Submit for Review/Approval**

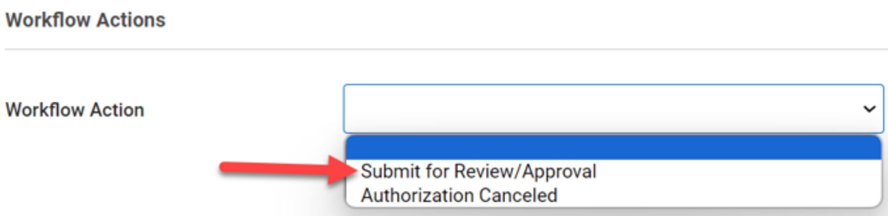


Figure 9-40 Workflow Action

9. A new box will display **Send for Review/Approval**, choose the person who will need to approve the Authorization:

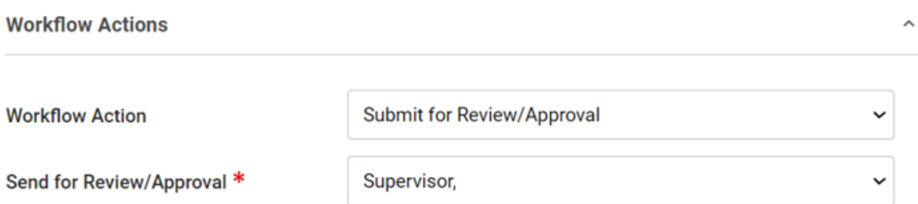


Figure 9-41 Workflow Action > Send to Supervisor

10. Navigate to the **Signatures** section and just like before, click the **pencil icon** (JAWS announces this as 'Signature') next to **Counselor Signature** label:

Figure 9-42 Counselor Signature Field

11. Password confirmation pop-up will display. **Enter password** (same password used to login):

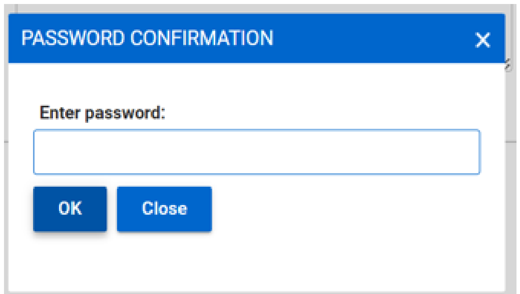


Figure 9-43 Password Confirmation

12. Case Managers name will display, be read only, and have the time and date stamp.

13. Once **Save** has been clicked an email will be sent to the Supervisor alerting them of an Authorization pending review and the status of the Authorization will be changed to **Draft Pending Review/Approval**:

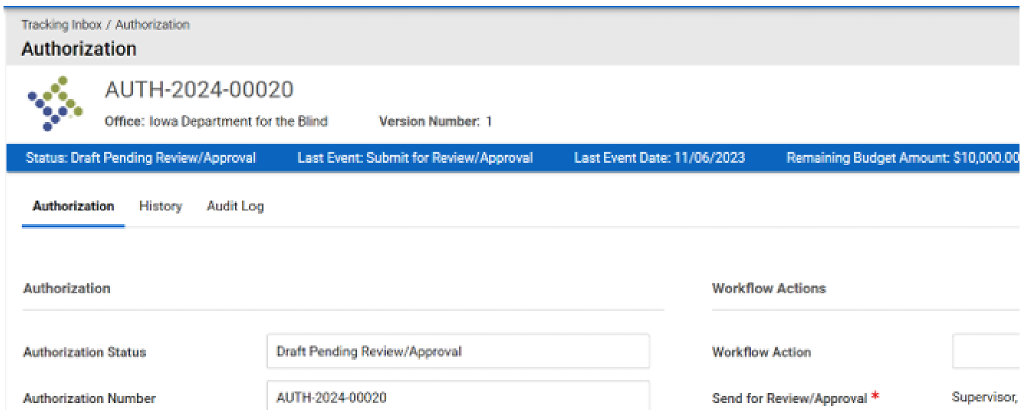


Figure 9-44 Authorization Status = Draft Pending Approval

14. A Supervisor is required to complete the workflow.

15. Navigate either from the email notification or the Authorizations Pending Review Queue to the appropriate Authorization:

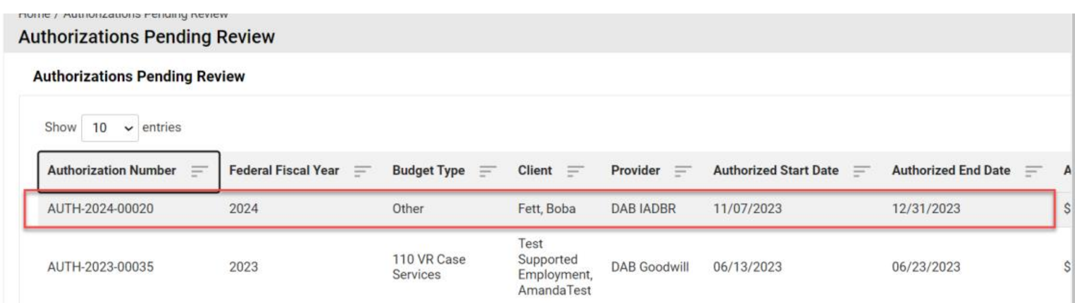


Figure 9-45 Authorization Pending Review Queue

16. Just like before, pick the appropriate **Workflow Action**. For this example, happy path, **Draft Pending Approved** will be selected.

17. Navigate to signatures and follow the steps to complete the signature and click **Save**.

18. The Authorization will change to **Issued** and an email will be sent to the Case Manager letting them know the Authorization has been approved:

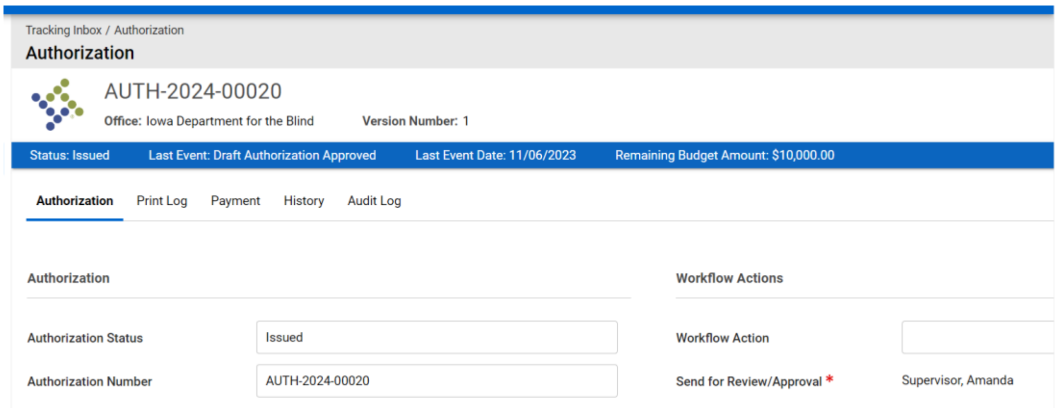


Figure 9-46 Authorization Status = Issued

19. Just like the previous example the Authorization can be printed and/or cloned.

20. When an Authorization is created and not from the plan it can be searched via the **Standard Search** or **Advanced Search** and will not be visible on the client record:

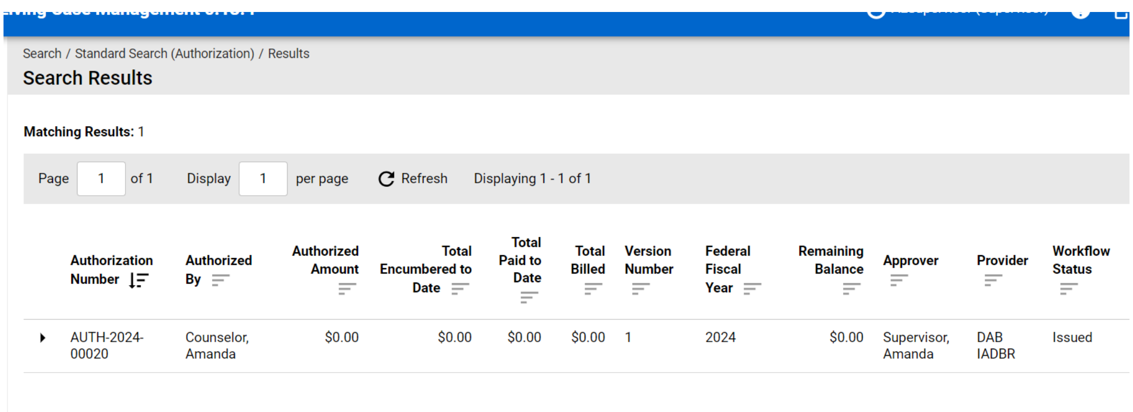


Figure 9-47 Search > Authorization

Note: In testing, a Program Note was created to add the Authorization number to the client record so it's visible.

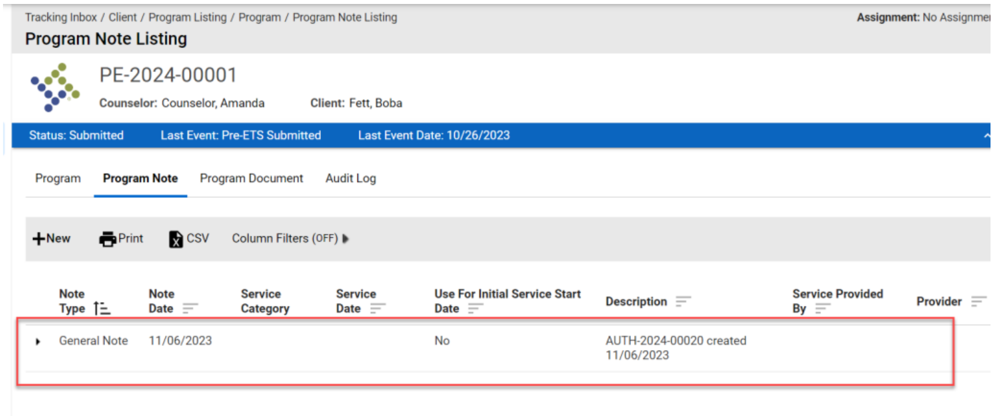


Figure 9-48 Program Note Authorization Number

21. When the Authorization is not created on the plan but the client has a program type of Vocational Rehabilitation, Independent Living Younger or Older Blind the Authorization will display on the bottom of the plan form with the associated Program (when creating an Authorization one of the required fields is the Program Type).

22. To view the Authorization, this can be done two ways: navigate to the **Client** > **Program** > **Authorizations**. The Authorization will display within the client's record and is not tied to a specific plan, only tied to the Program that was selected during the Authorizations creation.

For this example, the Program Type on the Authorization: Vocational Rehabilitation:

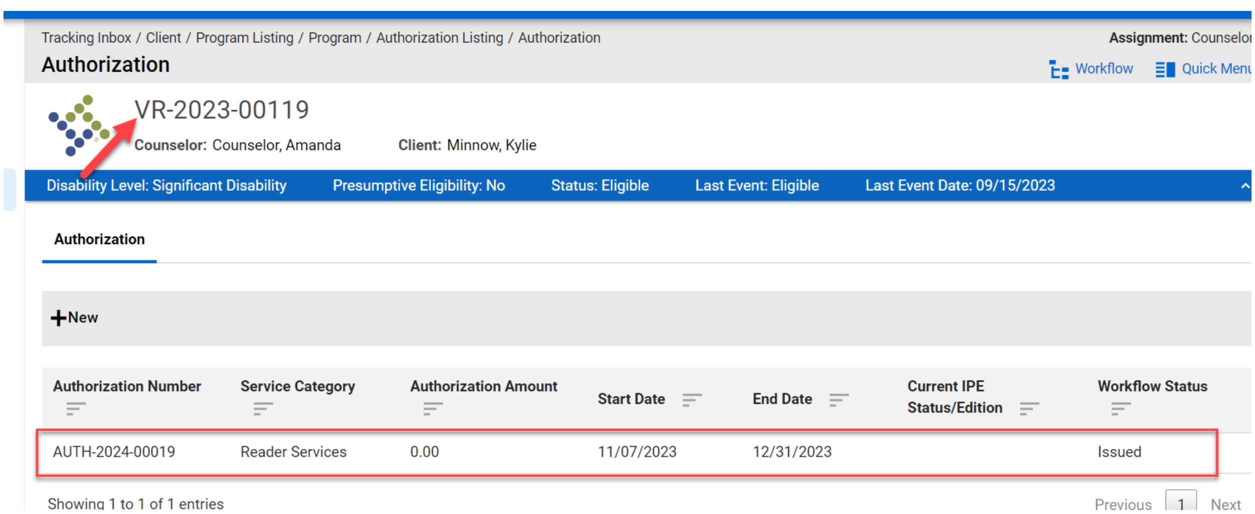


Figure 9-49 Authorization on a Client's Program

This client (for demonstration purposes) also has Independent Living programs; when navigating to those program types, choosing Authorization, the Authorization will not display:

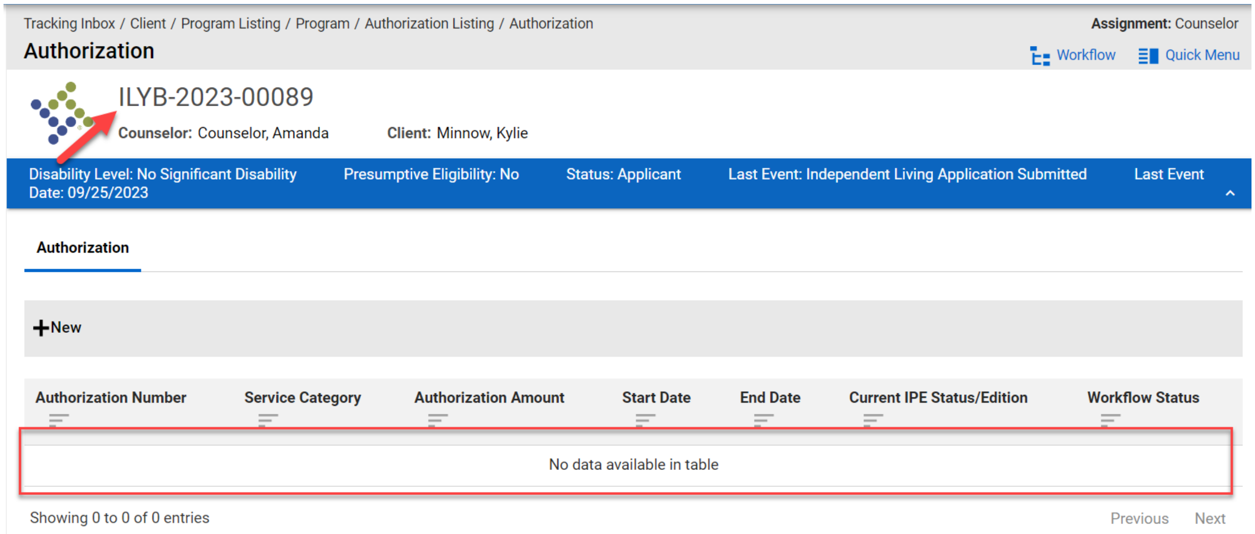


Figure 9-50 Authorization Does Not Display

23. To see the Authorization on the Plan navigate to the Plan and scroll to the bottom of the form. The client's Authorization will be listed as an Associated Authorization:

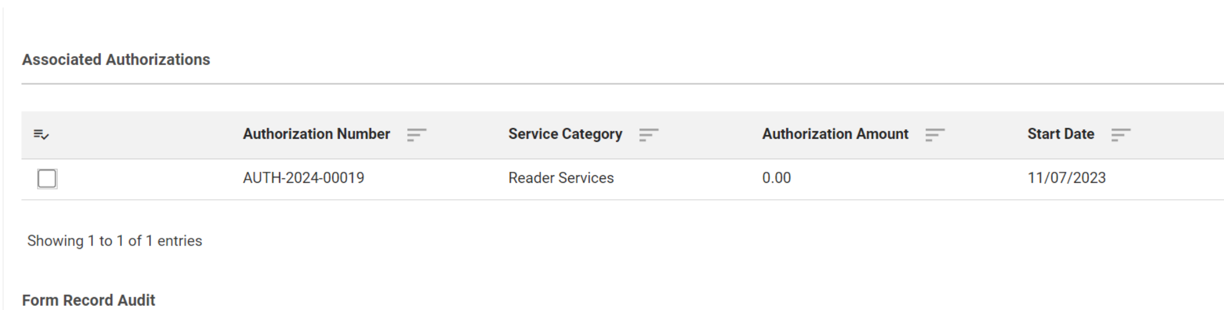


Figure 9-51 Authorization Displaying on the Plan as Associated Authorization

24. When looking at this client record you can see the services on the plan under **Service Category** are different that the **Service Category** listed on the Authorization:

Service Category:

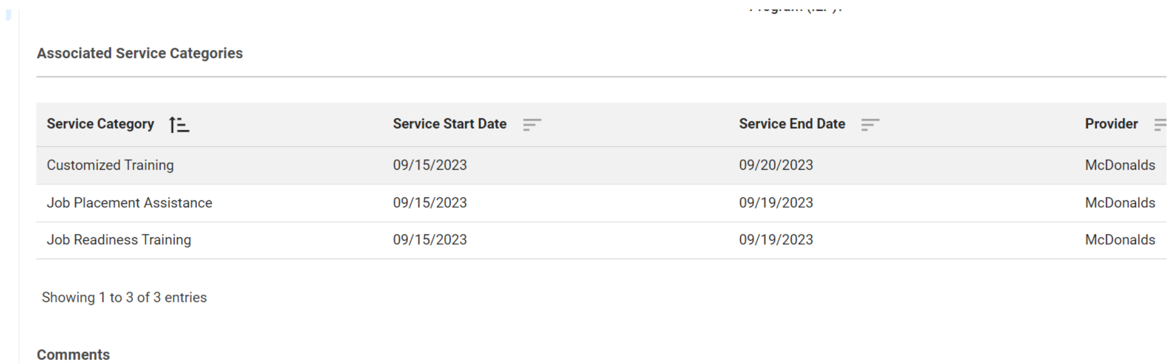


Figure 9-52 Associated Services Categories

Associated Authorizations:

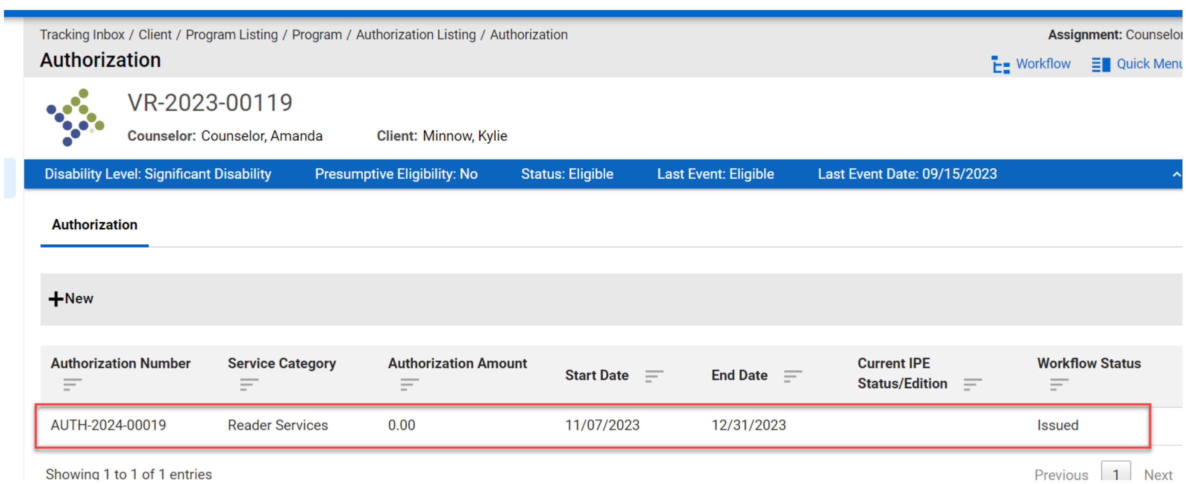


Figure 9-53 Associated Authorizations

This is because some services are restricted to plans ONLY (Auth created from the Plan) and some services are NOT restricted to plans only (Auth created NOT from a plan).

9.1.3 Creating an Authorization from a Plan

1. Login with your system provided account and navigate to a client whose plan requires an **Authorization** to be completed.

2. From the Client screen using the top menu navigate to **Program**, when the Program listings display choose the appropriate Program for the client.

3. When the **Program Information** form displays, choose the **Plan** tab.

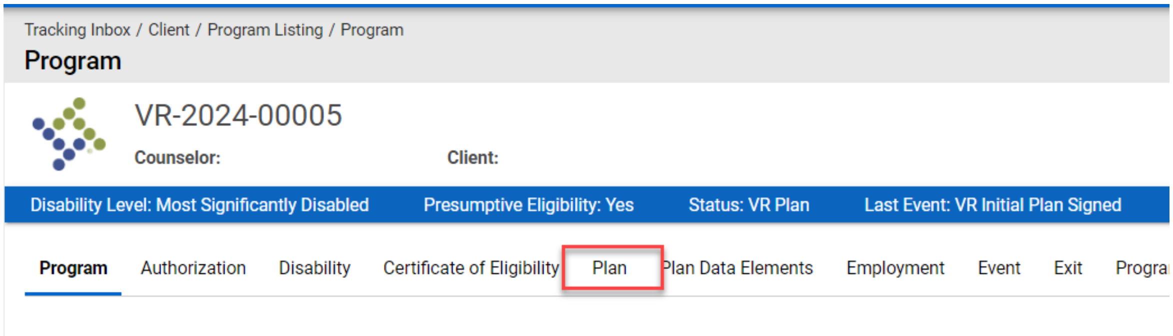


Figure 9-54 Plan Tab

4. The Plan will display. A plan does not have to be in a status of final to have an Authorization associated to it.

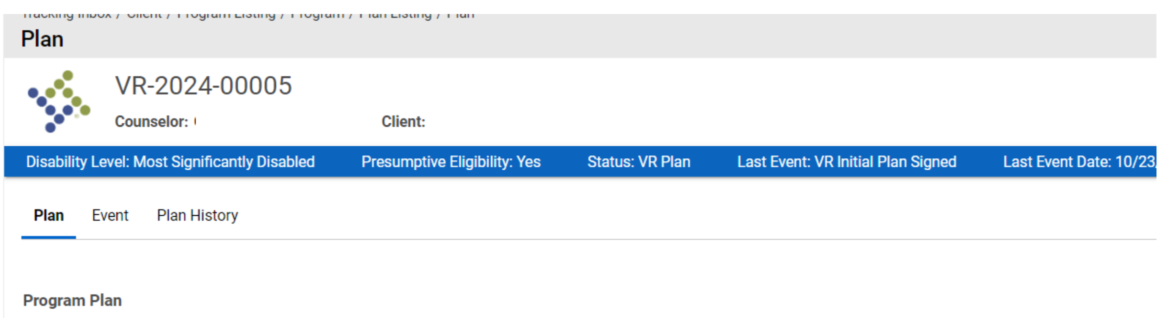


Figure 9-55 Plan Displays

5. Scroll to the bottom of the plan and select the **Create New Authorization** button.

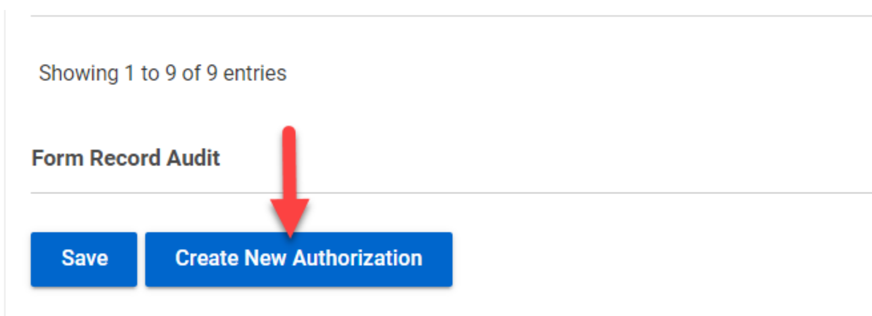


Figure 9-56 Create new Authorization Button

6. The Authorization form will display.

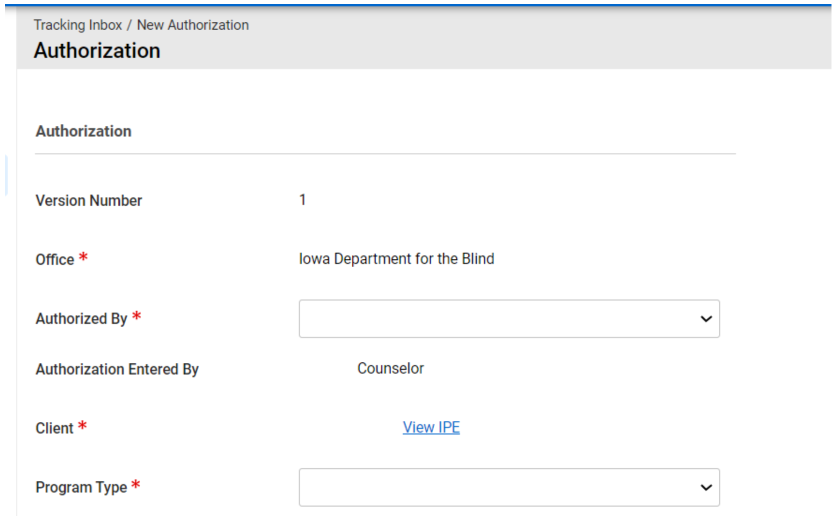


Figure 9-57 Authorization Form Displaying

7. Fill out the Authorization as explained previously and complete the Workflow Actions.

9.1.4 Workflow Actions – Amend as a Case Manager or Supervisor

1. If an Authorization needs to be modified after it has been issued navigate to the **Authorization**. Locate the **Workflow Actions** on the right side of the form. In the drop-down select **Amend**.

Note: A Supervisor will not require the approval workflow for an amendment; the system will automatically accept it however, the Counselor will require Supervisor approval which requires the Authorization to go back through the workflow.

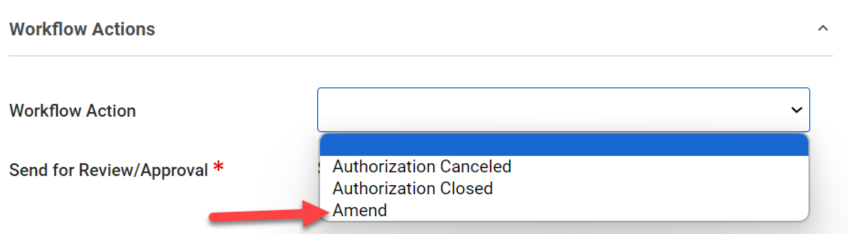


Figure 9-58 Workflow Action: Amend

2. A new field will display '**Amendment Reason'**. Select the reason in the drop-down:

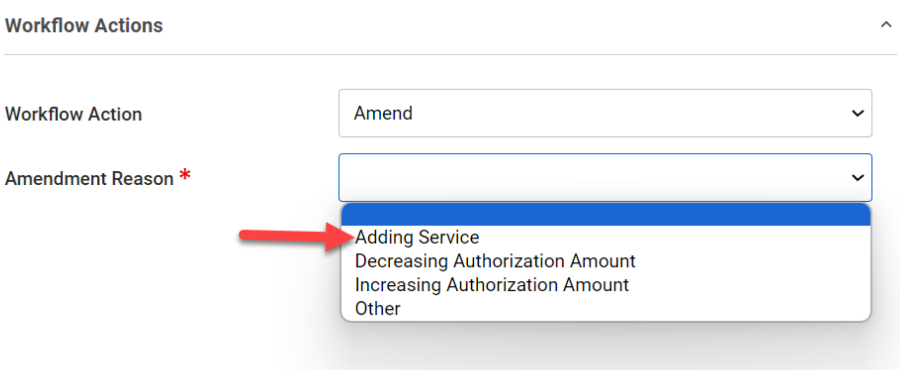


Figure 9-59 Workflow Action: Amendment Reason

3. For this example, **Adding Service**.

Note: If 'Other' is chosen an additional box will display **Other Amendment Reason** and is required to be populated:

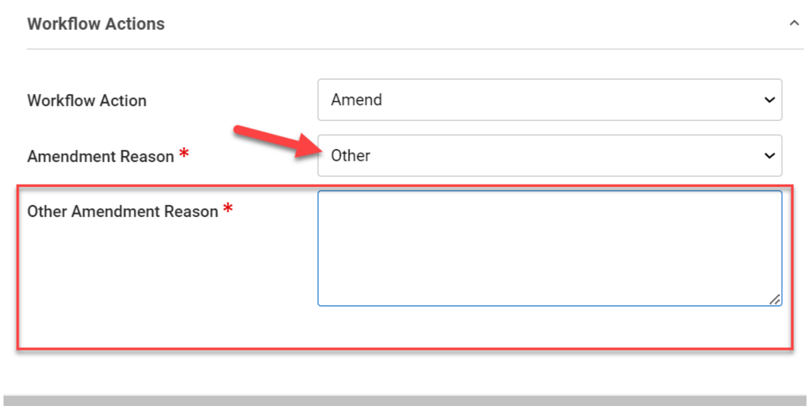


Figure 9-60 Amendment Reason = Other

4. When **Amend** is chosen the Version Number of the Authorization will update (this example it is now Version 2)

5. Navigate to the bottom of the form and click **Save**.

6. The Authorization Status will update to **Issued**; the additional service is now populated under the Service Category:

Figure 9-61 Service Category Displays

7. The Authorization can again be Printed or Cloned.

8. To review the history of the Authorization and see the Amendment, click the **History tab** at the top of the screen and the history will display:

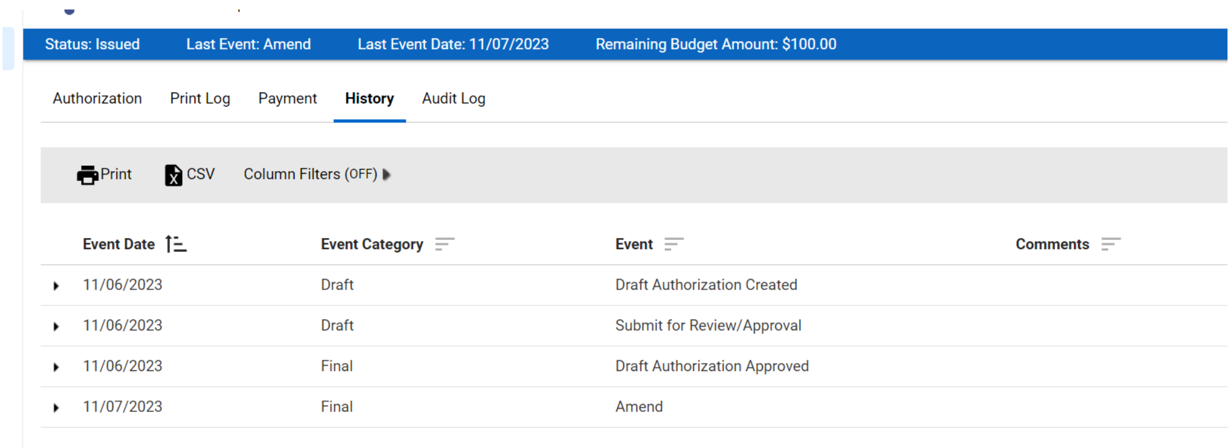


Figure 9-62 Authorization History Tab

9.1.5 Workflow Actions – Authorization Closed as a Support Staff, Case Manager or Supervisor

1. If an Authorization needs to be closed after it has been issued navigate to the **Authorization**. Locate the **Workflow Actions** on the right side of the form. In the drop-down select **Authorization Closed**:

Workflow Actions

Workflow Action	Authorization Closed
Send for Review/Approval *	Supervisor, Amanda

Figure 9-63 Workflow Action = Authorization Closed

2. Upon **Save** the Authorization Status will update to **Closed**.

Note: Once an Authorization has been closed it can no longer be amended; there are no further Workflow Actions.

3. To view the history, just like before, click the **History tab.**

4. When an Authorization is closed it is still visible on the bottom of the plan for the associated program. Clicking into it will reflect the closed status.

Associated Authorizations

	Authorization Number	Service Category	Authorization Amount	Start Date
☐	AUTH-2024-00019	Reader Services, Transportation	0.00	11/07/2023

Showing 1 to 1 of 1 entries

Figure 9-64 Associated Authorization on Plan with a Status = Closed

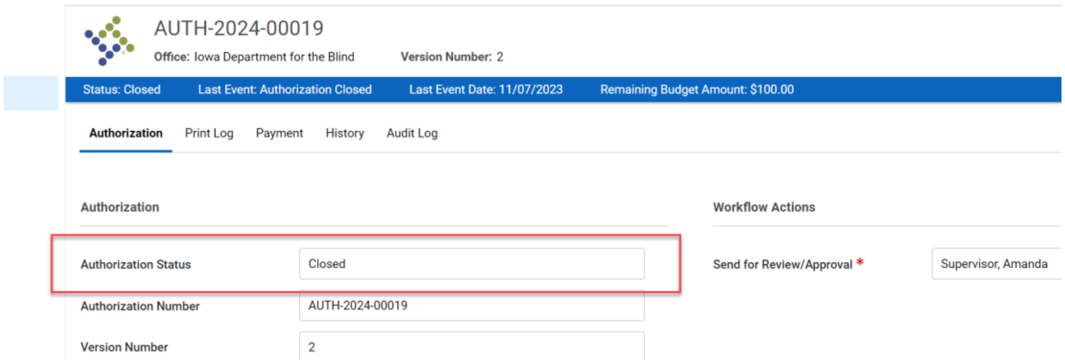


Figure 9-65 Authorization Status = Closed

It is also visible on the programs Authorization tab and will show a Workflow Status of Closed:

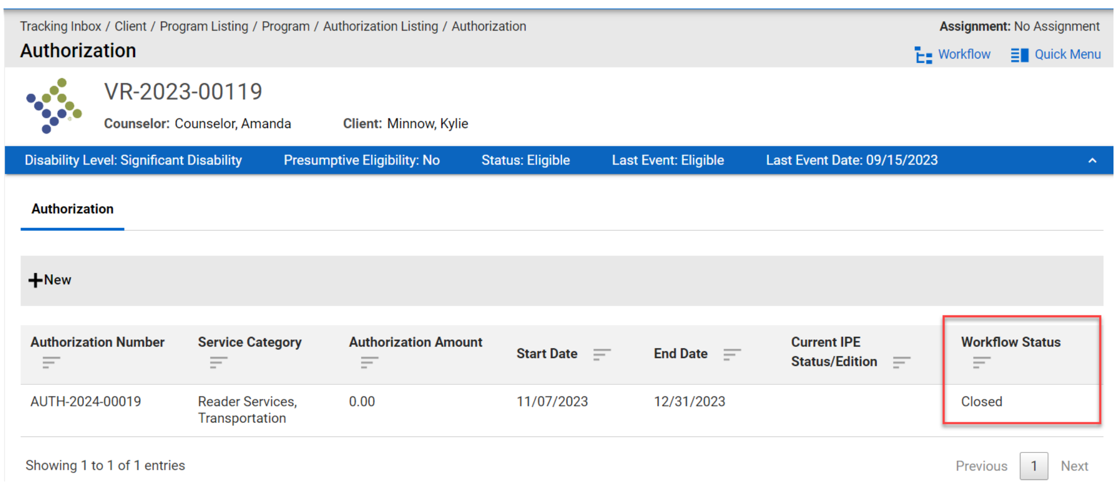


Figure 9-66 Workflow Status = Closed

9.1.6 Workflow Actions – Authorization Return for Revisions as a Supervisor

1. If an Authorization needs to be **Returned to the Case Manager** before it can be approved navigate to the **Authorization**. Locate the **Workflow Actions** on the right side of the form. In the drop-down select **Return for Revisions**.

2. A new field will display **Returned Comments**.

3. Upon **Save** the system will send an email to the Case Manager alerting them that the Authorization has been returned to them and needs revising:

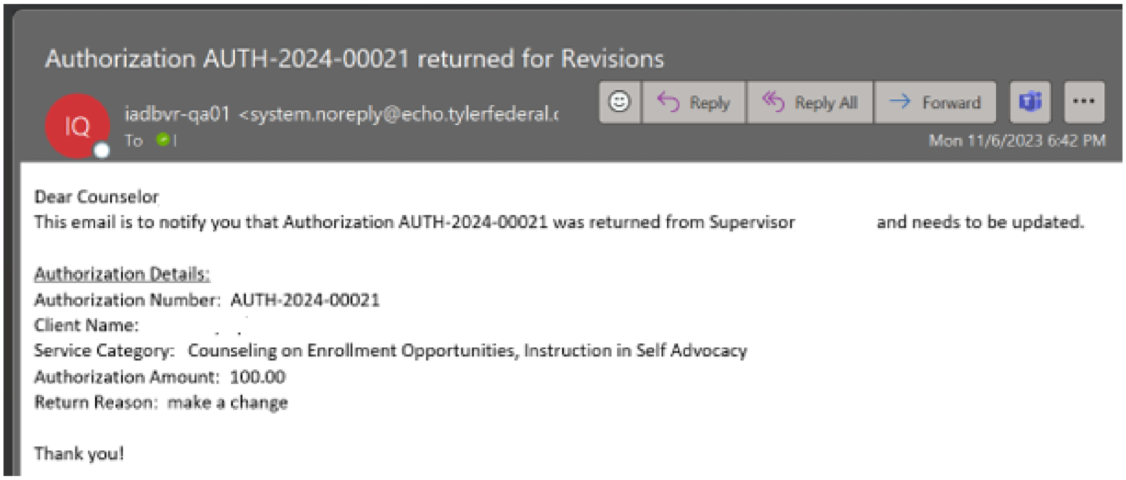


Figure 9-67 Email: Returned for Revisions

4. To make the revisions navigate back to the **Authorization**, make the revisions and follow the steps previously described to advance the Authorization through the workflow.

9.1.7 Workflow Actions – Authorization Canceled as Support Staff, Case Manager or Supervisor

1. If an Authorization needs to be **Canceled**, navigate to the **Authorization**. Locate the **Workflow Actions** on the right side of the form. In the drop-down select **Authorization Canceled**.

2. A new field will display, **Cancel Reason**. Choose the appropriate cancellation reason.

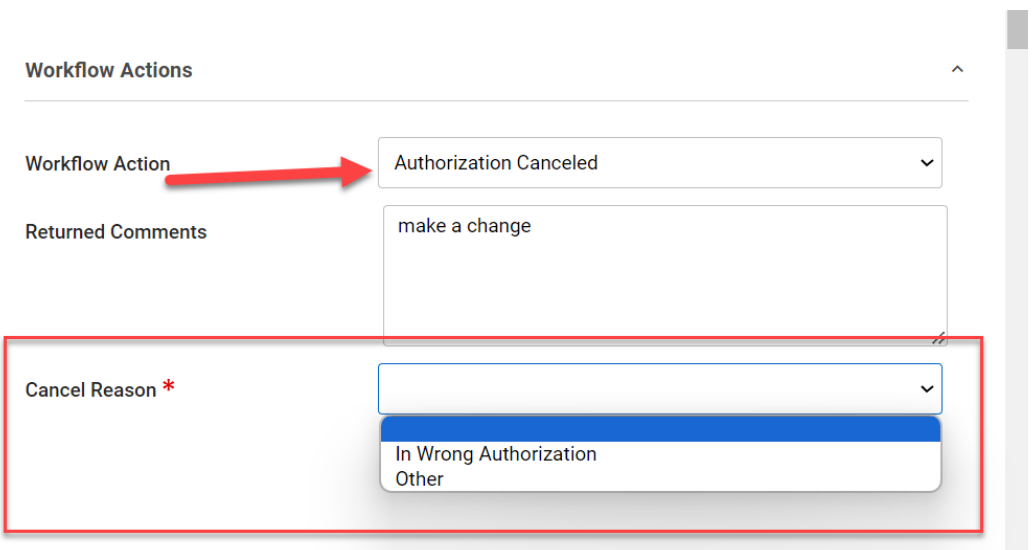


Figure 9-68 Authorization Canceled

3. If **Cancel Reason** = **Other**, a new field labeled **Other Cancel Reason** will display; this field is required and is a free text field:

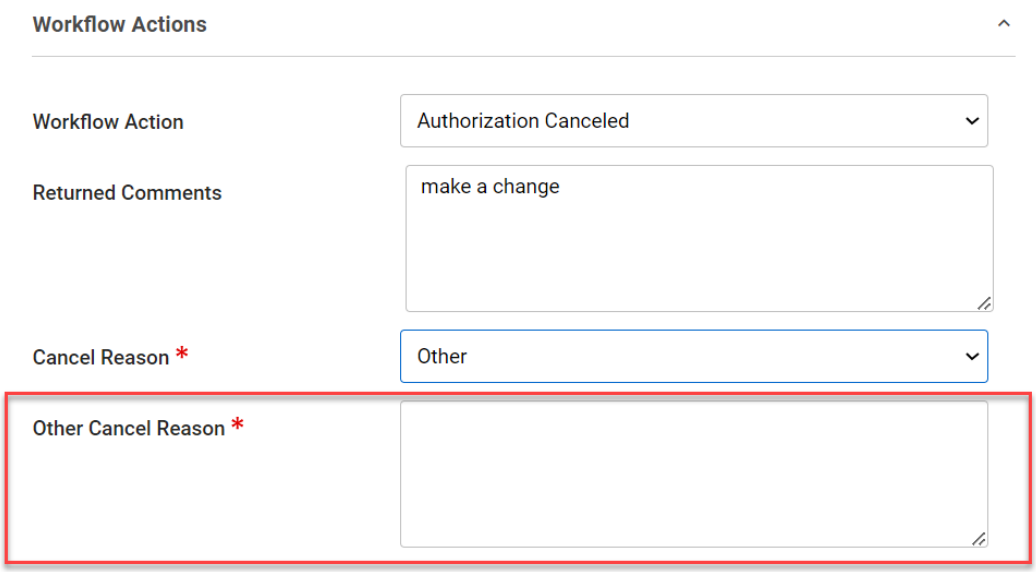


Figure 9-69 Workflow Actions Other Cancel Reason

10 Events

The Event tab allows users to implement a workflow which drives and enforces a process for an object.

Business Rules

- Auto-generated events will be read only for all users
- Conditions attached to certain events implement custom business rules and/or validations before the event can be added.
- Functions attached to certain events may require additional information to be entered prior to the event being added.

Features

An event may be added manually. These are already configured with business rules associated with some of them. Fields on the Event form are as follows:

- Event Category (required)
- Event (required)
- Event Date (required)
- Comments

Event Category (bullet) and Event (sub-bullet) options are as follows:

Eligibility

- Eligible

Services

- Receiving Services
- Counseling & Guidance
- Restoration
- Ready for Employment

Employment

- Employed

10.1 Adding an Event

1. Select the **Event** tab from the Program listing.

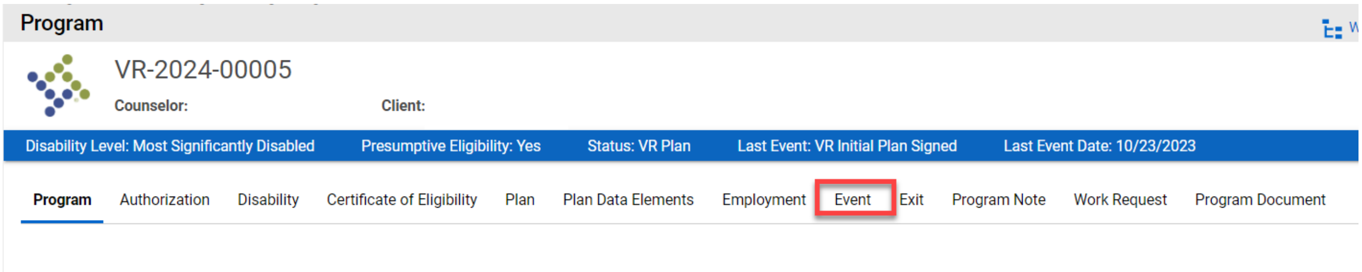


Figure 10-1 Event Tab

2. Select **+New** to create a new event.

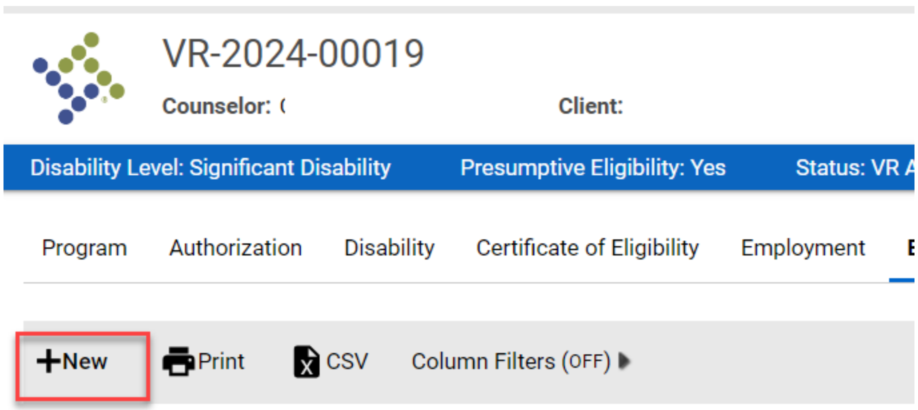


Figure 10-2 Event Tab > +New

3. The Event form will display

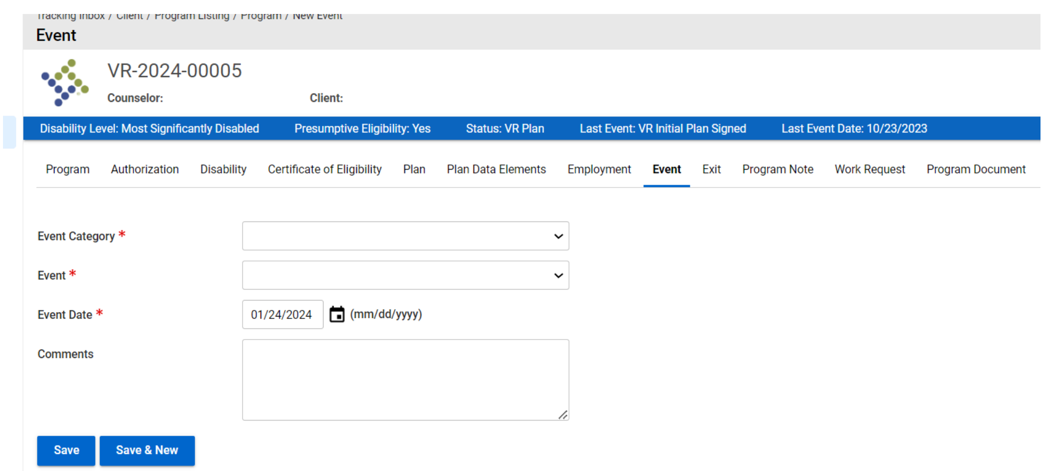


Figure 10-3 Event Form Displayed

4. The event categories automatically populate in the drop-down based on the program type.

10.1.1 Vocational Rehabilitation Events

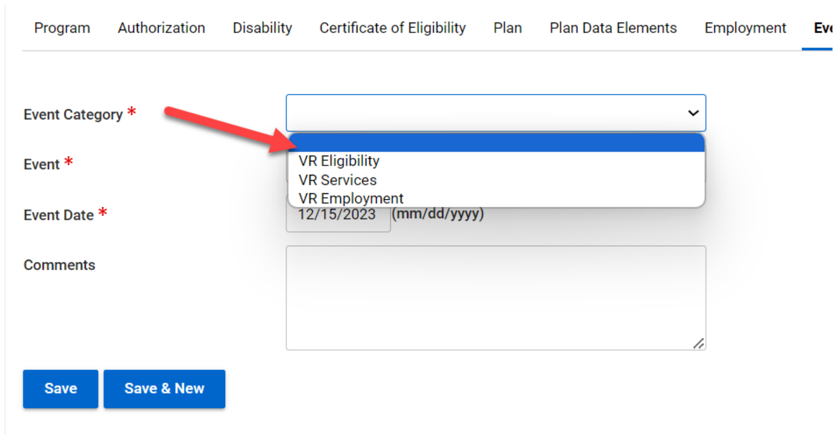


Figure 10-4 Event Category Drop-Down

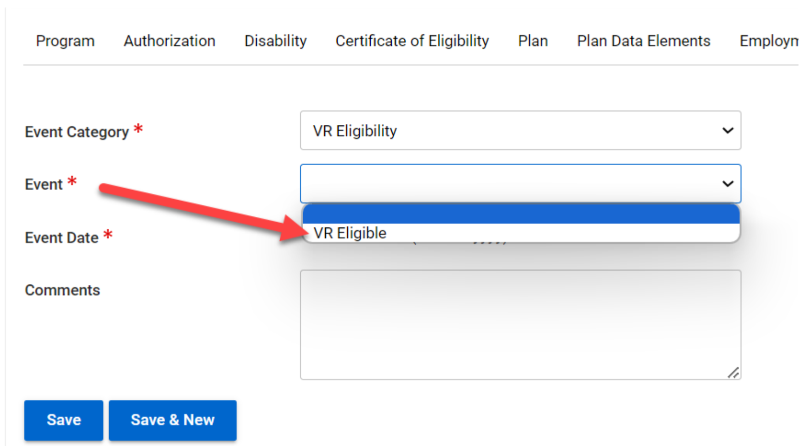


Figure 10-5 Event Drop-Down

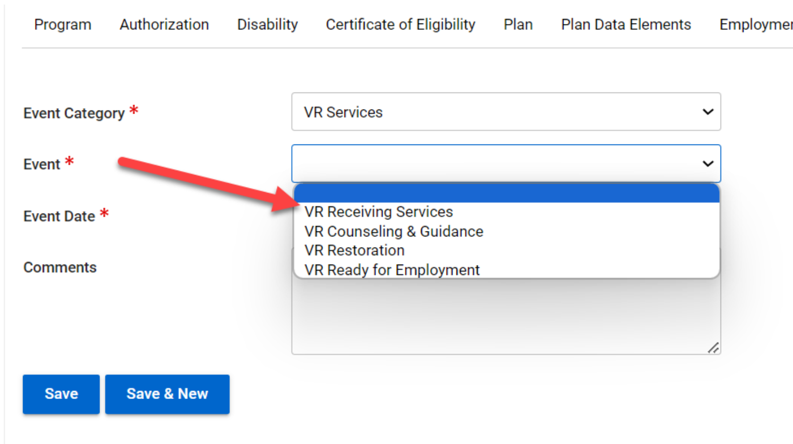


Figure 10-6 Event Drop-Down

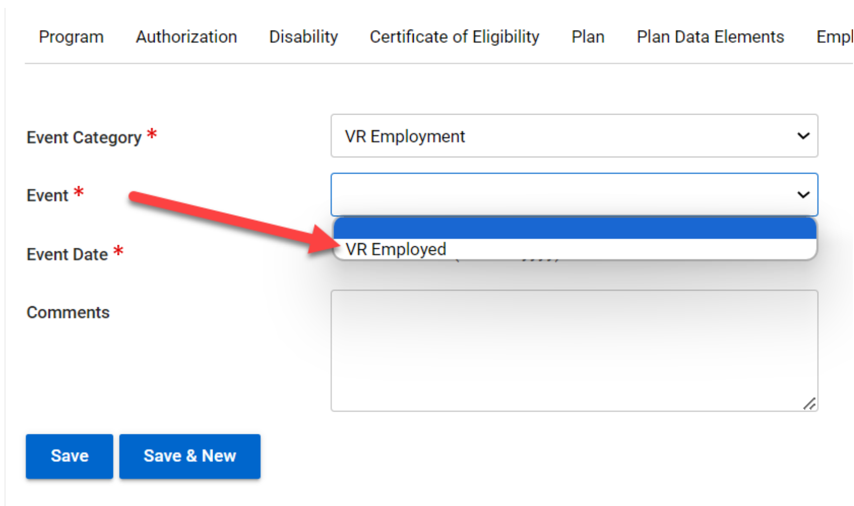


Figure 10-7 Event Drop-Down

2. The date will auto-populate to the current date but can be edited.
3. The comments section is optional.
4. Once all fields are populated click **Save**.
5. Once the event is saved the screen will refresh and open to the Event Listing.

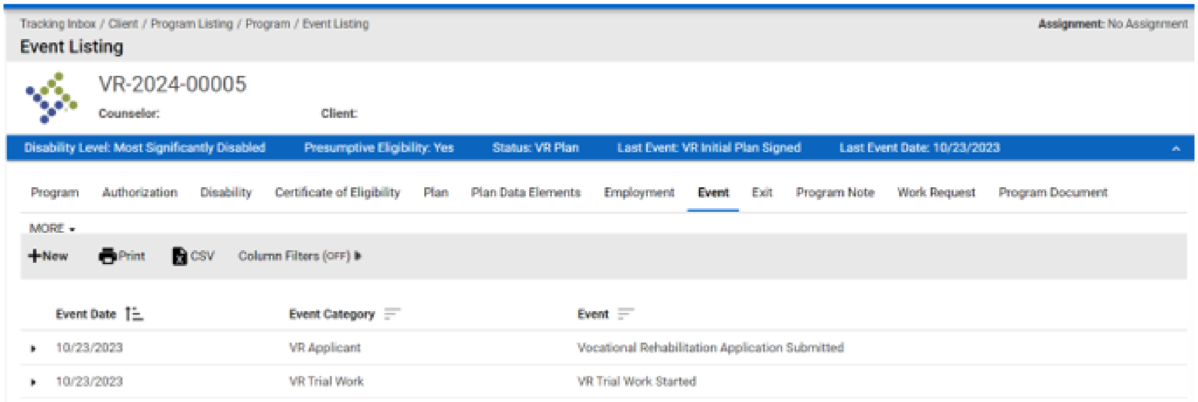


Figure 10-8 Event Listing Screen

10.1.2 Independent Living Younger Blind Events

1. Navigate to the client.
2. Navigate to the client's program and click the **Event** tab:

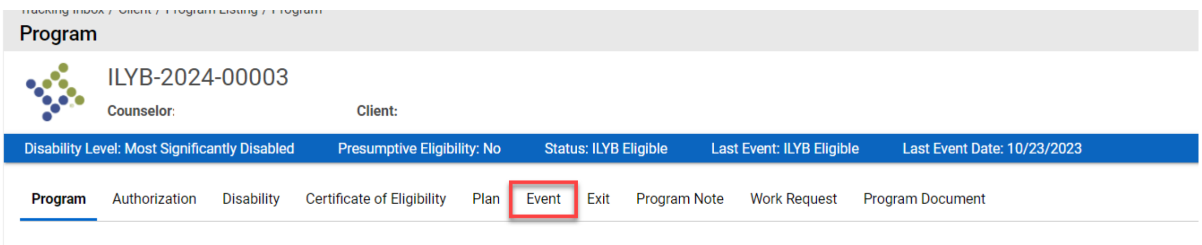


Figure 10-9 Event Tab

3. The Event Listing screen will display. Click **+New**.

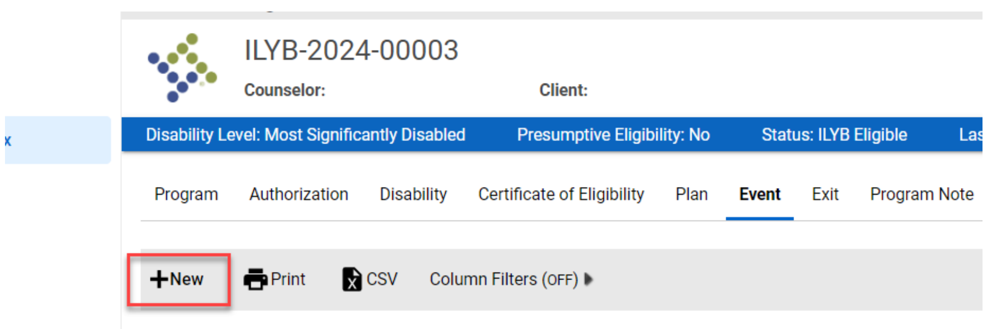


Figure 10-10 Event Listing +New

4. The Event form will display:

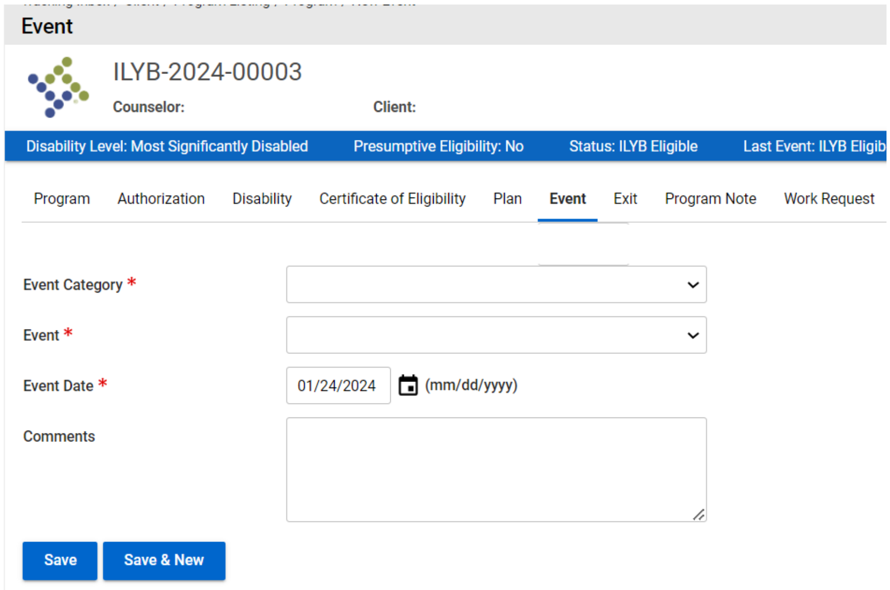


Figure 10-11 Event Form Displays

5. The Event drop-down populates based on what is chosen as the Event Category.

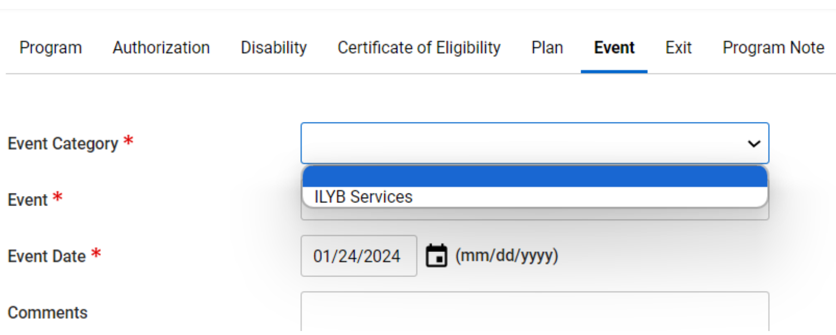


Figure 10-12 Event Category Drop-Down

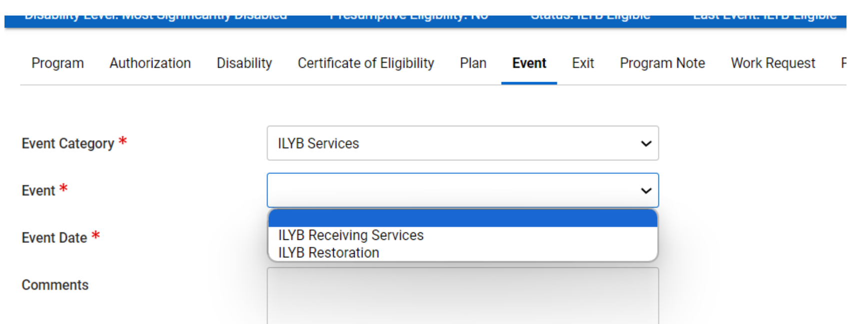


Figure 10-13 Event Drop-Down

6. Fill in required fields and click **Save**.
7. The event record will now be viewable in the Event Listing.

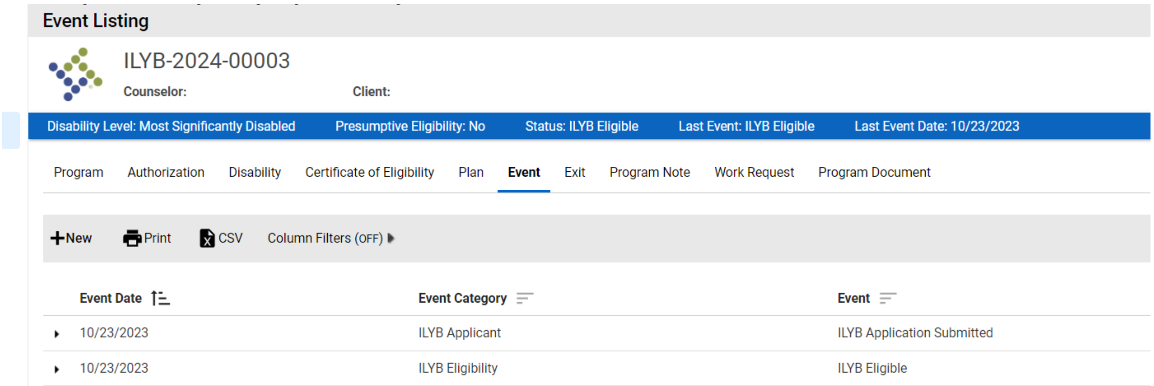


Figure 10-14 Event Listing

10.1.3 Independent Living Older Blind Events

1. Navigate to the client.
2. Navigate to the client's program and click the **Event** tab:

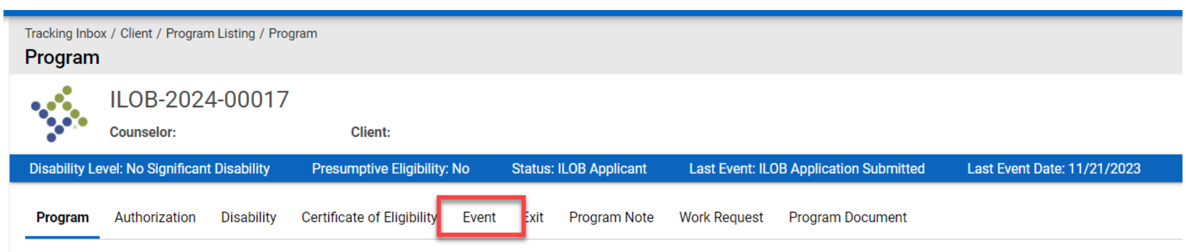


Figure 10-15 Event Tab

3. The Event Listing will display.
4. On the Event Listing screen click **+New**.

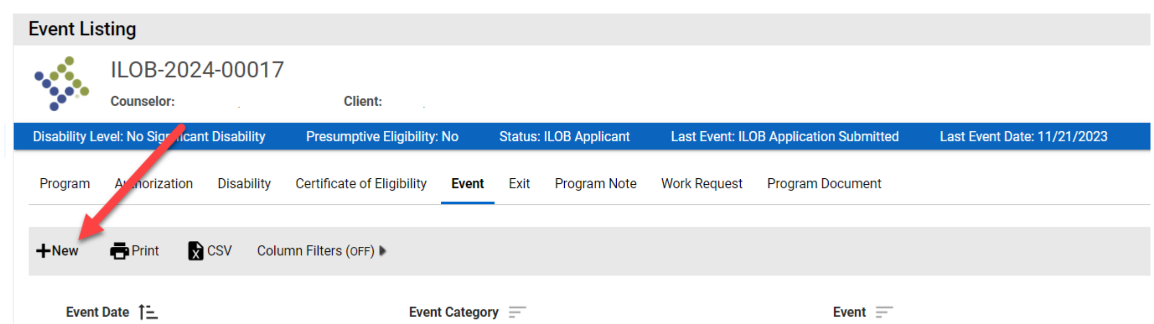


Figure 10-16 Event Listing +New

5. The Event form will display. Just like described previously, the Event Category will determine what is displayed as an Event.

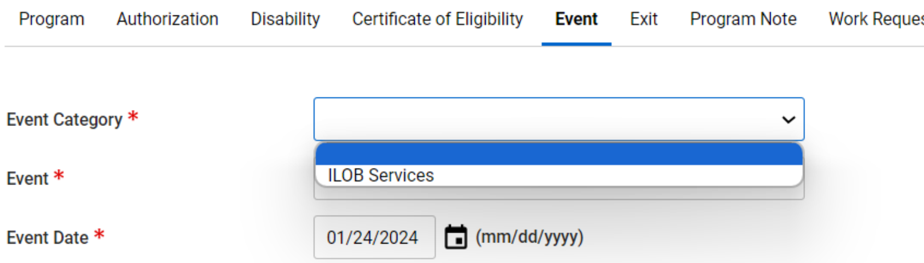


Figure 10-17 Event Category Drop-Down

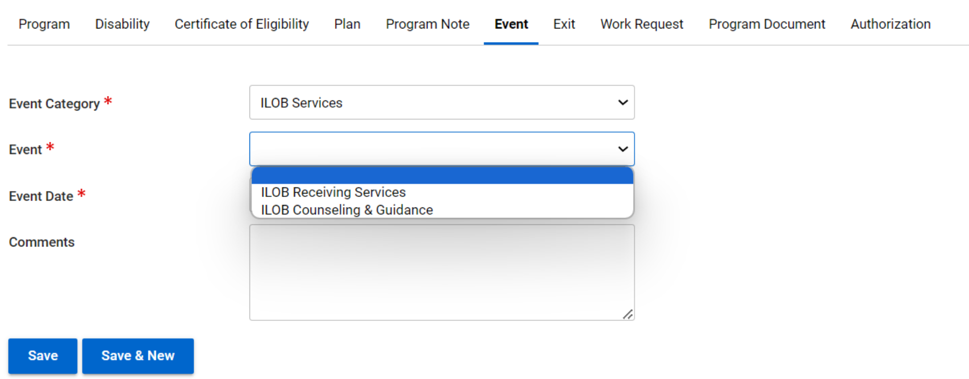


Figure 10-18 Event Drop-Down

6. Fill in required fields and click **Save**.

7. The event record will now be viewable in the Event Listing.

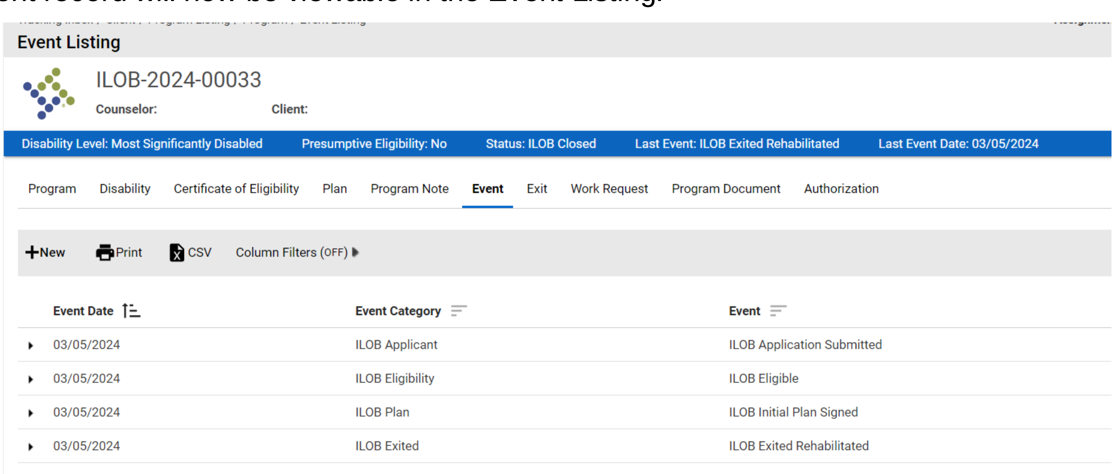


Figure 10-19 Event Listing

10.1.4 Complete List of Events by Program Type

Potentially Eligible

- PE Submitted
- PE Exited

Vocational Rehabilitation

- Vocational Rehabilitation Application Submitted
- Initial Plan Signed
- Eligible
- Eligible - OOS
- Counseling & Guidance
- Exited Before Eligibility
- Exited From Eligibility or Plan
- Receiving Services
- Restoration
- Services Interrupted
- Exited Not Rehabilitated
- Exited Rehabilitated
- Trial Work Started
- Trial Work
- Trial Work Ended
- Ready for Employment
- Employed
- Receiving Post Employment Services
- No Longer Receiving Post Employment Services

Independent Living Younger Blind

- Application Submitted
- Initial Plan Signed
- Eligible
- Counseling & Guidance
- Exited Before Eligibility
- Exited From Eligibility or Plan
- Receiving Services

- Restoration
- Services Interrupted
- Exited Not Rehabilitated
- Exited Rehabilitated

Independent Living Younger Blind

- Application Submitted
- Initial Plan Signed
- Eligible
- Counseling & Guidance
- Exited Before Eligibility
- Exited From Eligibility or Plan
- Receiving Services
- Restoration
- Services Interrupted
- Exited Not Rehabilitated
- Exited Rehabilitated

11 Exits

The Exit Record captures the information related to the individual client's exit from the VR program and used to report on the RSA 911 report. This section contains fields related to type of exit, reason for exit, and employment and support at the time of exit, etc.

Features

- Users are able to enter 'Exit' Event related information
- The 'Exit' tab captures the Vocational Rehabilitation Exit information, including the: event information, type of exit, consultation information, compatibility information, medical insurance at exit information., education information, SSDI, SSI, TANF, Vet, Workers Comp, General Assistance, and Other Public Support Received.
- The information captured at exit is required for the RSA 911 Report.

Note: Before saving an Exit Record you must:

Complete the XVII.D Employment at Exit

Create an Employment Event using the Event Tab (section 11).

The Event must be Employed

1. If the 'Event Category' = 'Closed,' then the following 'Event' options are available:

- Exited - Non Rehabilitated (All Other)
- Exited - Rehabilitated

2. If the 'Event Category' = 'Closed,' and the 'Event' = 'Exited - Rehabilitated' then the following fields are displayed:

- Type of Exit
- Exit Reason
- Consultation
- Rationale for any Consultation items not Completed (required if all Consultation items are not selected)
- Compatibility
- Rationale for any Compatibility items not completed (required if all Compatibility items are not selected)
- Significant Services Provided contributing to the Employment Outcome
- Benefit package Available
- Medical Insurance
- Education level
- Student with a Disability
- Primary Source of Support

- SSDI
- SSI
- TANF
- Vet
- Workers' Comp
- General Assistance
- Other Public Support Received
- Other Public Support Amount (should only display if Other Public Support Received = Yes and is Required)

3. If the 'Event Category' = 'Closed,' and the 'Event' = 'Exited - Non Rehabilitated (All Other)' then the following fields are displayed:

- Type of Exit
- Exit Reason
- Consultation
- Rationale for any Consultation items not Completed (required if all Consultation items are not selected)
- Compatibility
- Rationale for any Compatibility items not completed (required if all Compatibility items are not selected)
- Rationale for Ineligibility or Case Exit
- Medical Insurance
- Education Level
- Student with a Disability
- Primary Source of Support
- SSDI
- SSI
- TANF
- Vet
- Workers' Comp
- General Assistance
- Other Public Support Received
- Other Public Support Amount (should only display if Other Public Support Received = Yes and is Required)

4. Once the Exit record has initially been created, 'Event Category' and 'Event' will become read only for all roles.

5. When event "Exit - Non Rehabilitated (All Others)" is added then event is auto-inserted in "Event Tab" all fields are read-only, Exit Tab becomes singleton and user will not be allowed to add other Exit Events.

6. When event "Exit - Rehabilitated" is added then this event is auto-inserted in "Event" tab all fields in read-only, and user is allowed to add more exit events in Exit tab.

7. Users are not allowed to manually add any exit events in Events Tab.

8. Users are not allowed to set "Exit Date" of any Exit Event to future date.

9. When event "Exit - Rehabilitated" is added then following exit events can be added:

- "Exited - Receiving Post Employment Services"
- "Exited - No longer receiving post-employment services"

10. When user adds any of these exit events then only following fields are displayed: "Event", "Event Category" and "Exit Date"

- "Exited - Receiving Post Employment Services"
- "Exited - No longer receiving post-employment services"

11. Users are not allowed to add "Exited - No longer receiving post-employment services" when "Exited - Receiving Post Employment Services" does not yet exist.

12. When user adds "Exited - Receiving Post Employment Services" this event is auto-inserted in Event Tab.

13. When user adds "Exited - No longer receiving post-employment services" this event is auto-inserted in Event Tab.

14. Users are not allowed to delete "Exit - Rehabilitated" when either event "Exited - Receiving Post Employment Services" or "Exited - No longer receiving post-employment services" exists.

15. When user deletes any of the following exit events: "Exit - Non Rehabilitated", "Exit - Rehabilitated", "Exit - Receiving Post Employment Services" or "Exit - No longer receiving post-employment services," these events are also deleted from "Event" tab.

11.1 Entering Exit Information

1. Select the **Exit** tab from the Program Record.

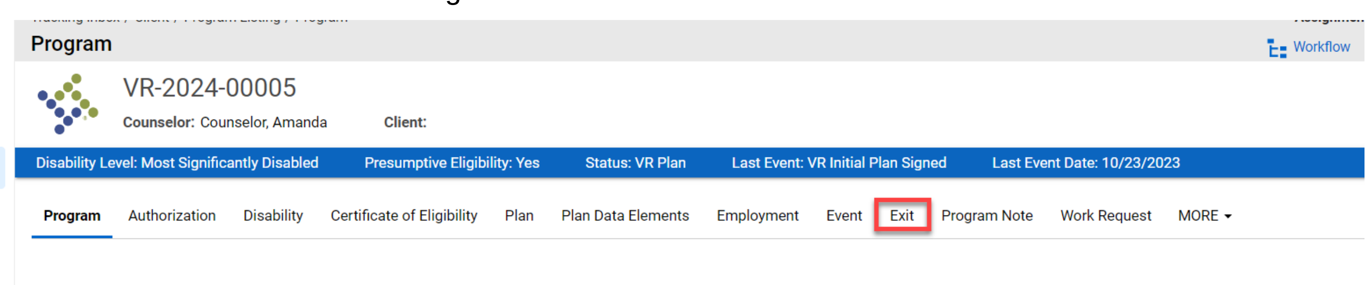


Figure 11-1 Exit Tab

2. The Exit form will display.

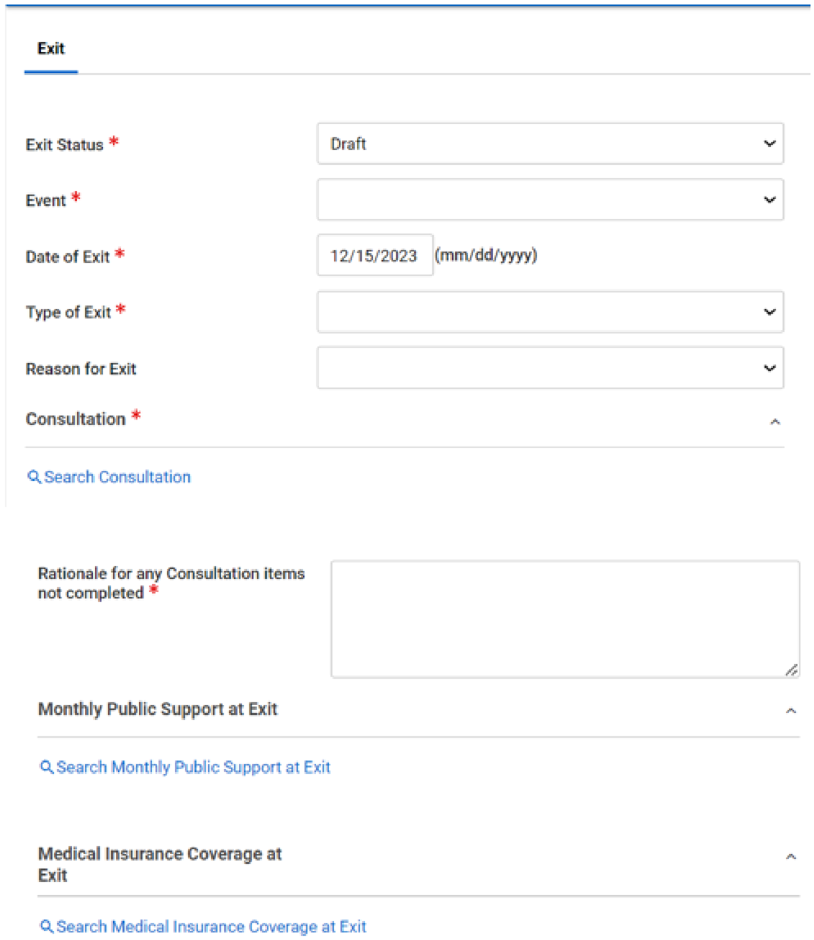


Figure 11-2 Exit Form

3. Search **Consultation** and provide rationale for any consultation items not completed if required. The fields and selection list presented will vary dependent on the Event selected earlier.

4. Search **Compatibility** and provide rationale for any Compatibility items not completed and provide rational for ineligibility or Case Exit if required.

5. Complete the remainder of the fields on the form. If **Other Public Support Received** is checked, you will be required to enter **Other Public Support Amount**.

6. Complete the required fields. Some fields will become required that were not previously when the status of the Exit is changed from Draft to Final. Click **Save**.

7. Once save is clicked, the screen will refresh and display the Exit Listing.

11.2 Post Exit

1. The Post Exit tab allows users to capture employment information by quarter after a client has exited the VR Program with an outcome of 'Rehabilitated'. The information captured on this tab is also reported back on the RSA 911 Report. This tab is only available for Vocational Rehabilitation program types as Independent Living program types do not capture employment information.

The 'Post Exit' tab is only available once the Exit tab has been completed with an event of 'Exited - Rehabilitated'.

11.2.1 Adding a Post Exit Record

1. Once the Exit Record has been completed the Post Exit Tab will become available.

Figure 11-3 Post Exit Tab

2. Select 'Post Exit' and complete the required fields. You will be required to complete each of the quarterly sections:

- First Quarter After Exit Quarter
- Second Quarter After Exit Quarter
- Third Quarter After Exit Quarter
- Fourth Quarter After Exit Quarter

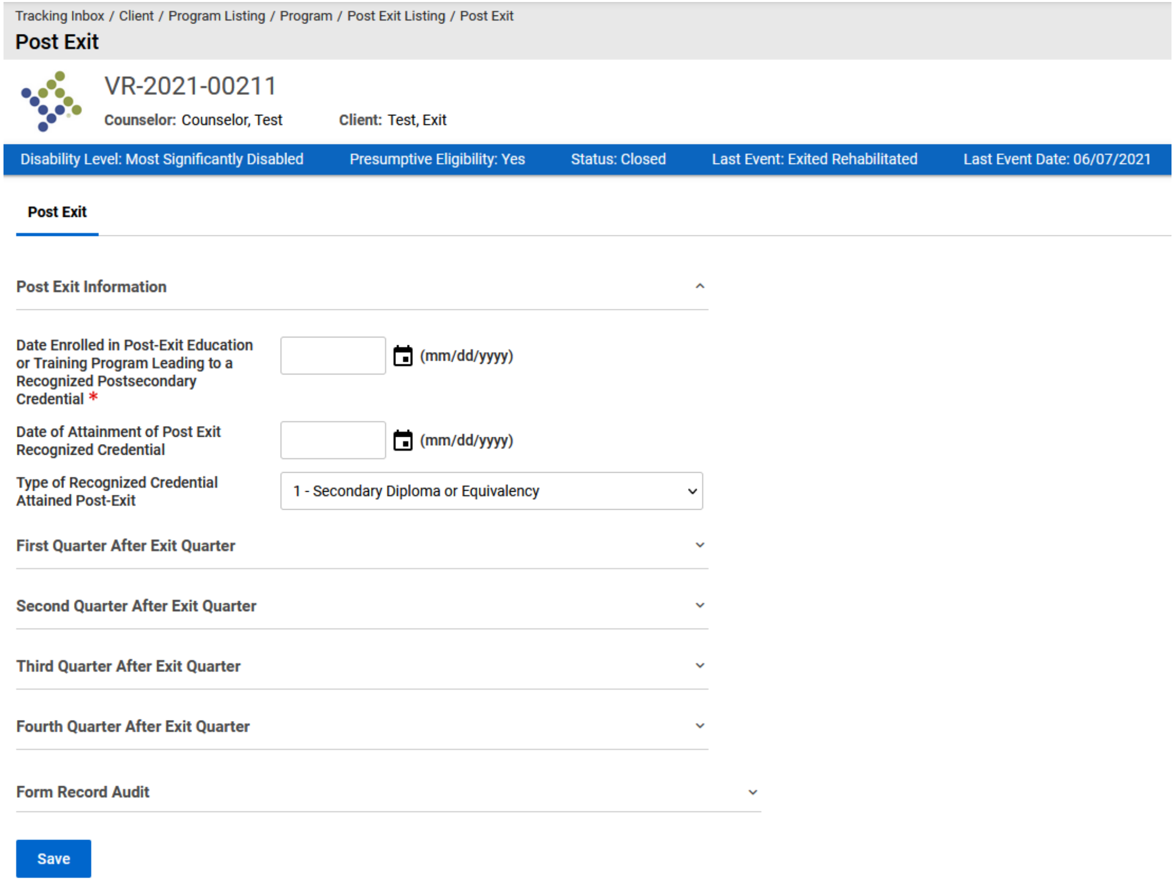


Figure 11-4 Post Exit Form

12 Work Requests

The Work Request tab allows users to track specific tasks for a Program record. Due Dates can be assigned to Work Requests as well as a priority.

- Work Requests can be entered into the VR system two different ways:
  - Stand-Alone as a tracked object from the main Tracking Inbox.
  - As a 'Tab'/Child to a Program entered for a Client.
- Once a Work Request is 'Completed' or 'Cancelled' it becomes read-only.
- The Work Request tab utilizes the Workflow Setup allowing you to implement a workflow process for any Work Request that is entered.
- Tasks can be configured through the PSO Work Request Task RDO

12.1 Work Request

1. Navigate to the client record requiring a Work Request through **Search**.
2. Navigate to the client's program.
3. Once the Program Information displays click on **Work Request** in the top ribbon.

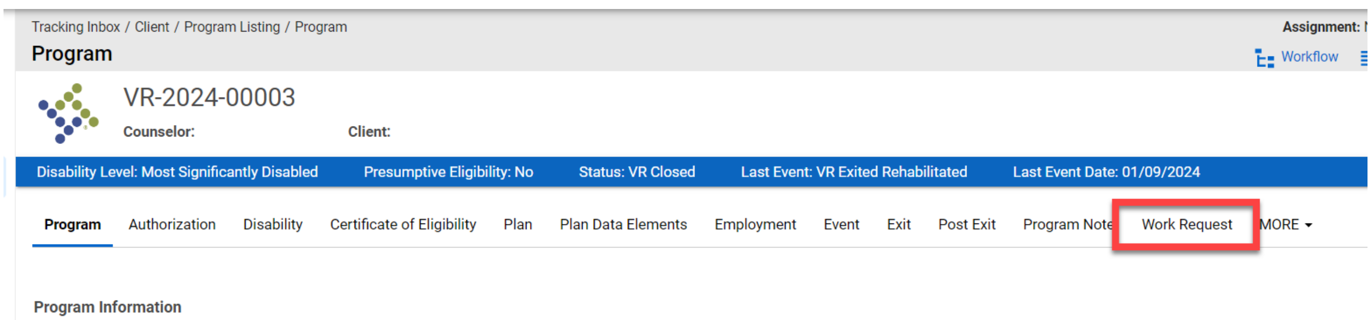


Figure 12-1 Work Request Tab

4. The Work Request Listing will display. Any previous work requests will be listed on this screen.

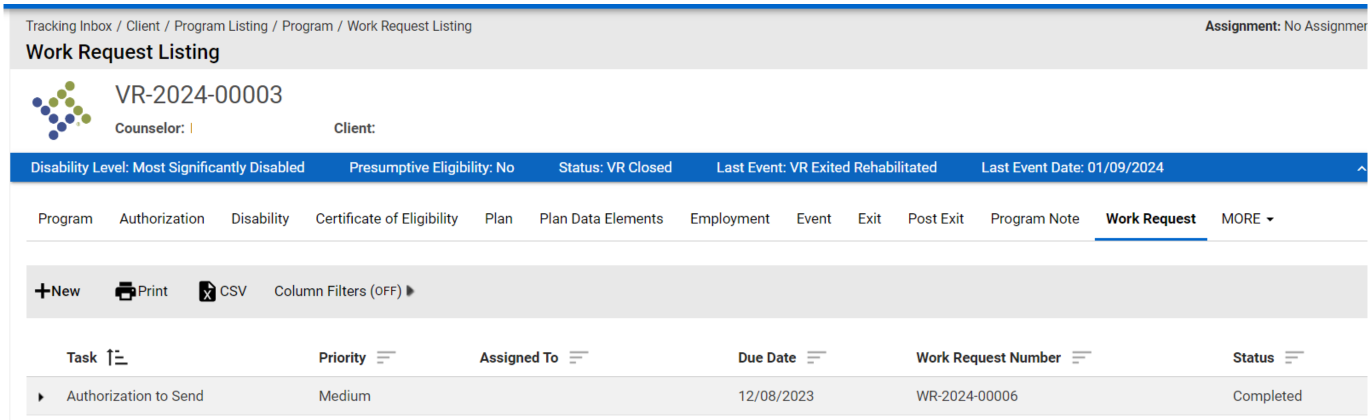


Figure 12-2 Work Request Listing

5. Click **+New**.
6. The Work Request form will display.

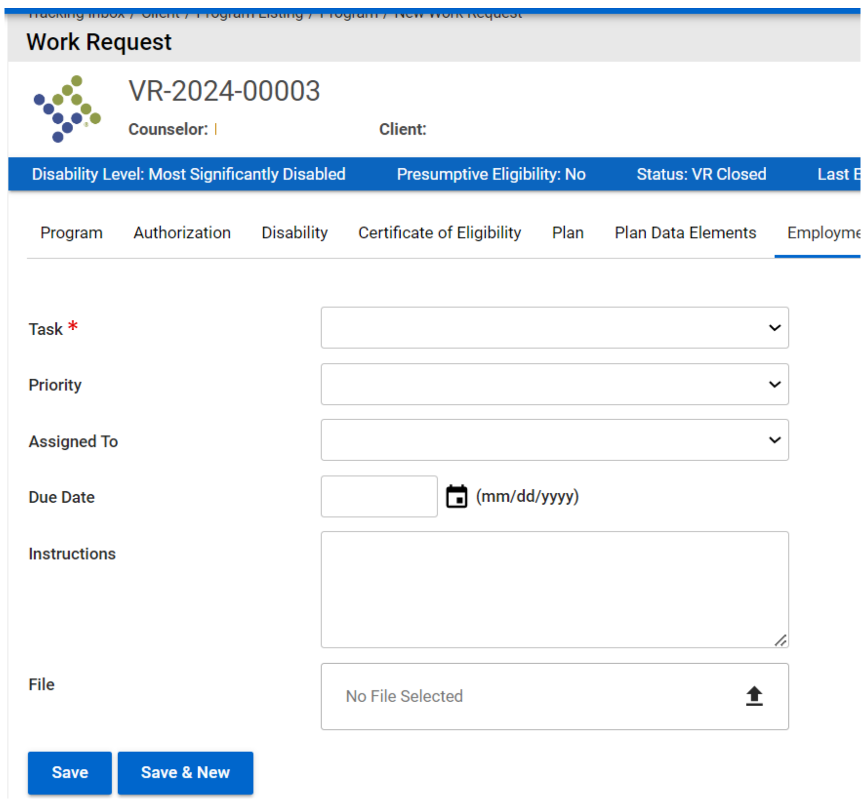


Figure 12-3 Work Request Form

7. The only required field on this form is the **Task** drop-down.

Note: Although the Assigned To drop-down is not a required field, if not populated the work request will remain in the queue for the client, there will not be any notifications sent.

The 'Assigned To' drop down populates with all users who are associated with the Office selected on the Program tab.

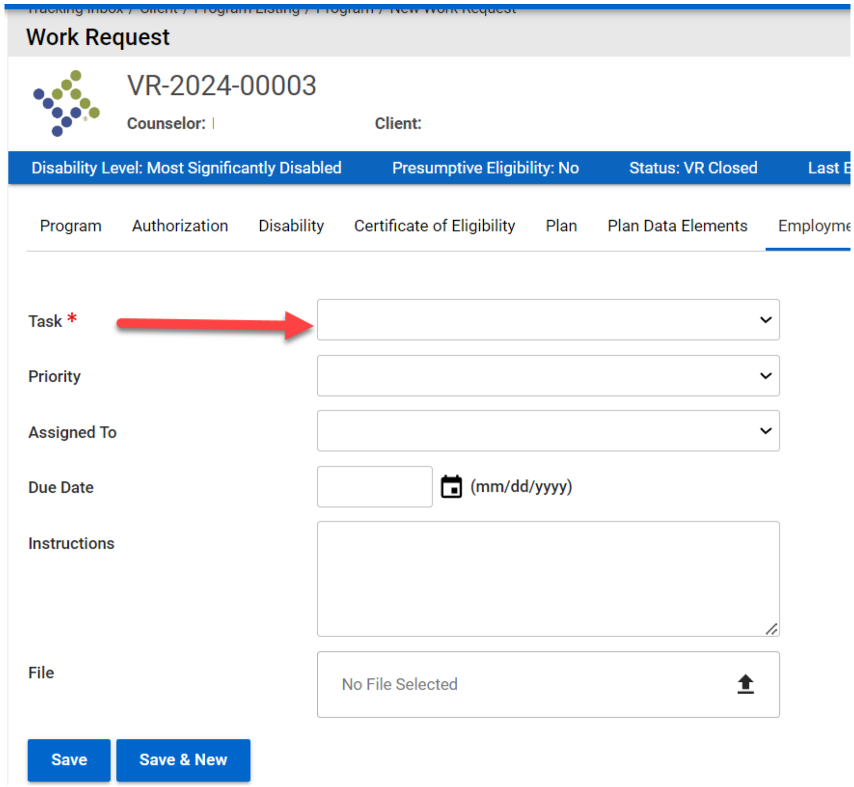


Figure 12-4 Task is a Required Field

8. Clicking the Task drop-down will display the three options for a work request

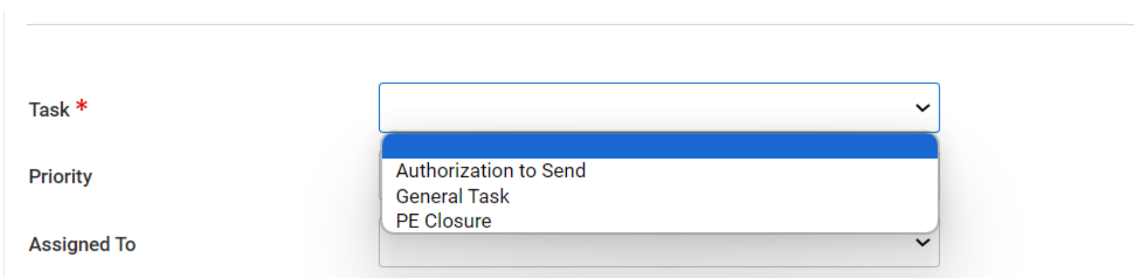


Figure 12-5 Task Drop-Down Selections

9. Fill out the fields needed and, if needed, upload any required documentation via the File upload section.

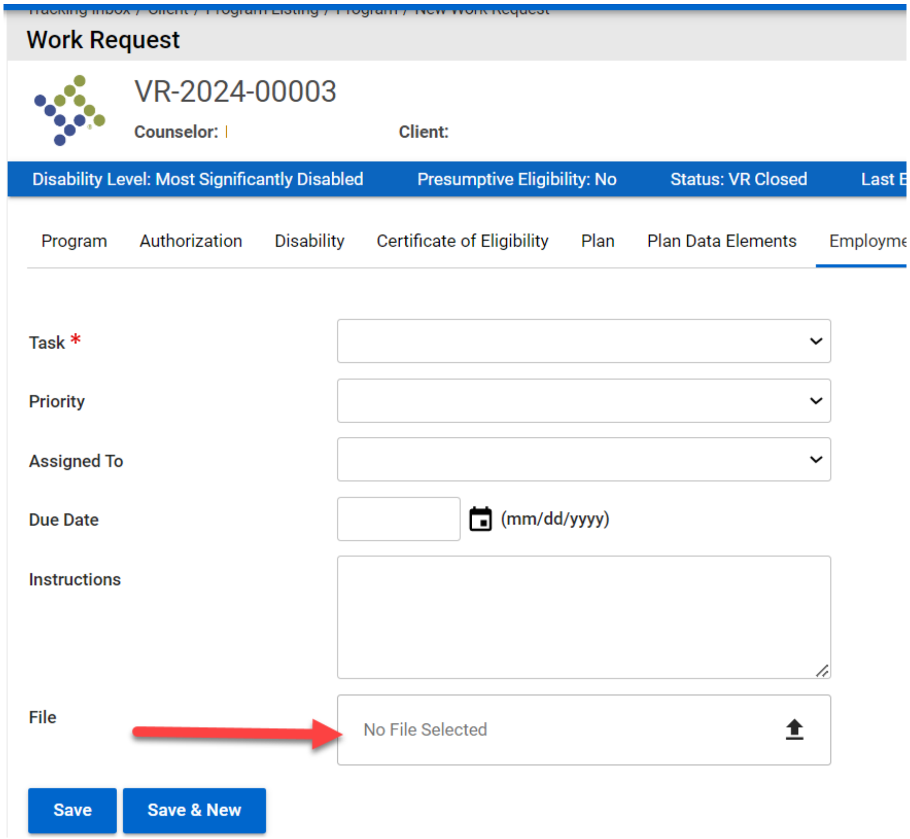


Figure 12-6 Work Request File Upload

10. To upload a file click on the arrow pointing up with the line below it.

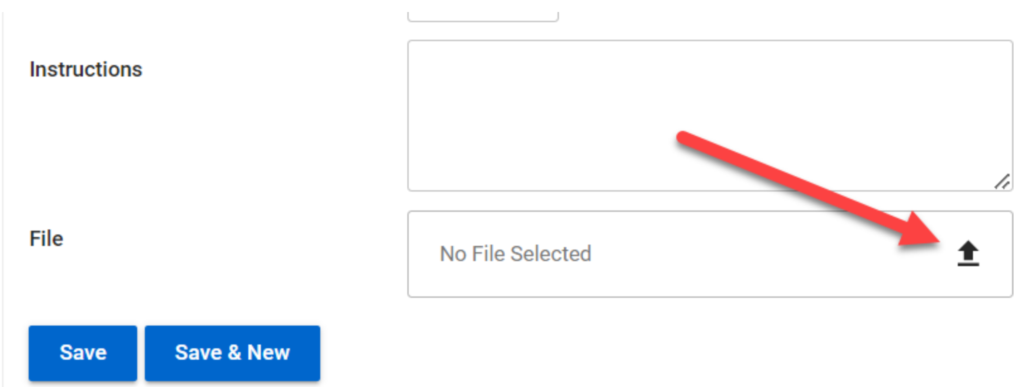


Figure 12-7 Work Request File Upload Icon

11. This will bring up the user's files where the appropriate file can be selected. Locate the appropriate file and click on it, the upload will automatically begin.

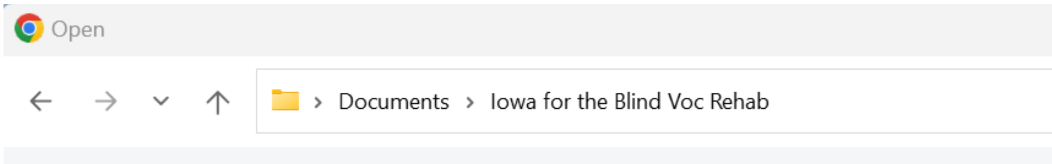


Figure 12-8 Document Location Example

12. Once the document has been uploaded the green bar along the bottom will display and the status will read Upload complete.

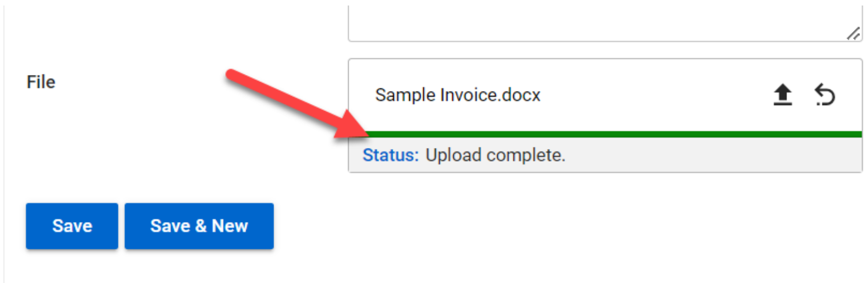


Figure 12-9 Document Upload Complete

13. Click **Save**.

14. The screen will refresh and open to the Work Request Listing screen. The newly created work request will display on the screen.

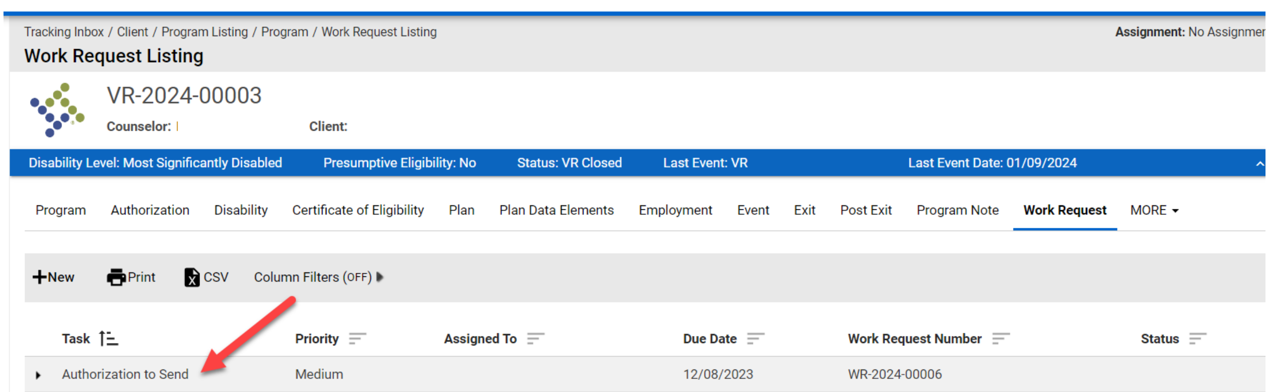


Figure 12-10 Work Request Listing Display

15. For the staff who is required to process the work request they will receive a notification that the work request has been created.

16. For this example the work request was assigned to Support Staff personnel. Those records are viewable through the client Work Request page as described above or through the Support Staff **Queue** > **Open Tasks Assigned to Me.**

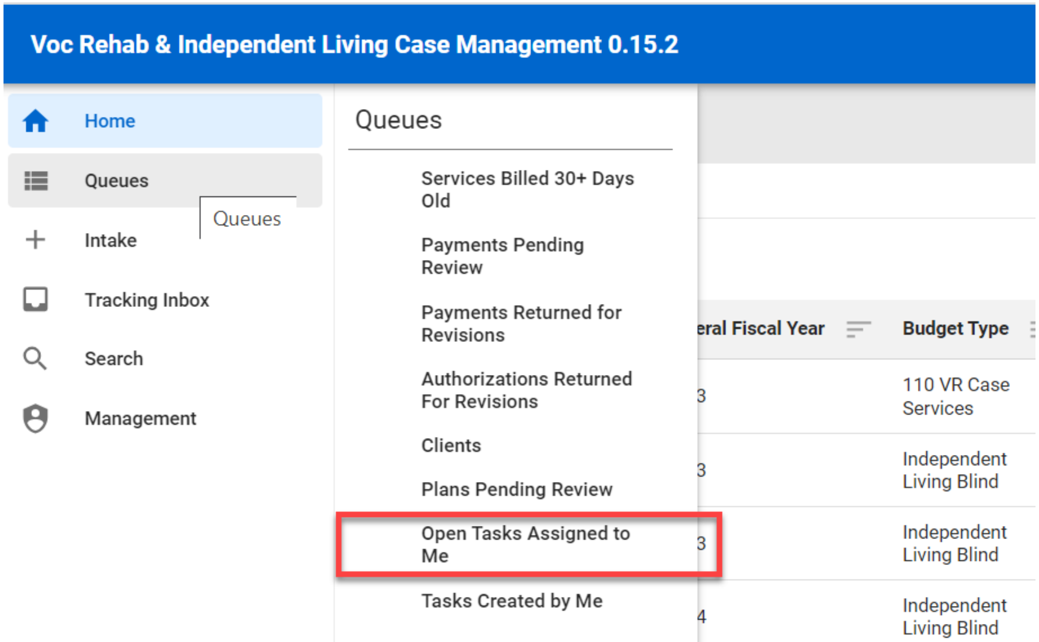


Figure 12-11 Menu > Open Tasks Assigned to Me

17. Click on the record will open the Work Request.

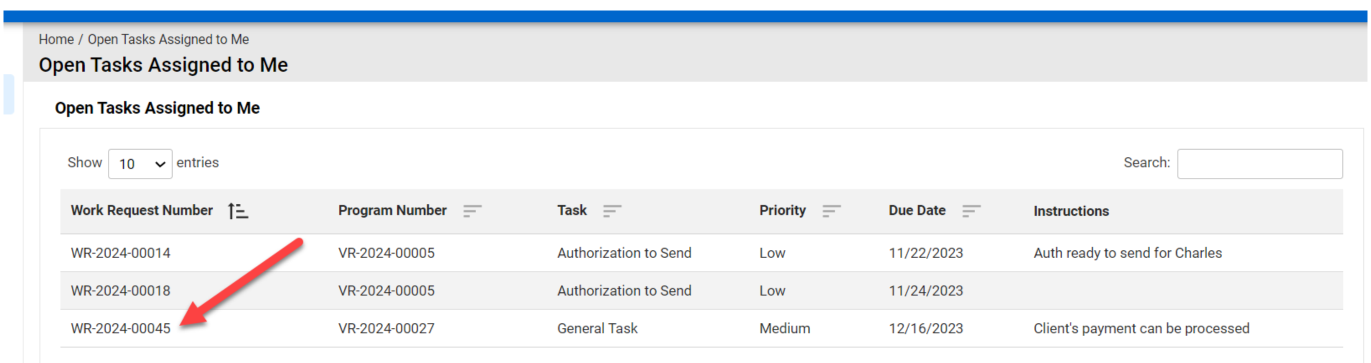


Figure 12-12 Open Tasks Assigned to Me Queue Display

18. The work request form will display informing the user of what needs to be completed. There is also new fields: Work Request Number, Status and Action.

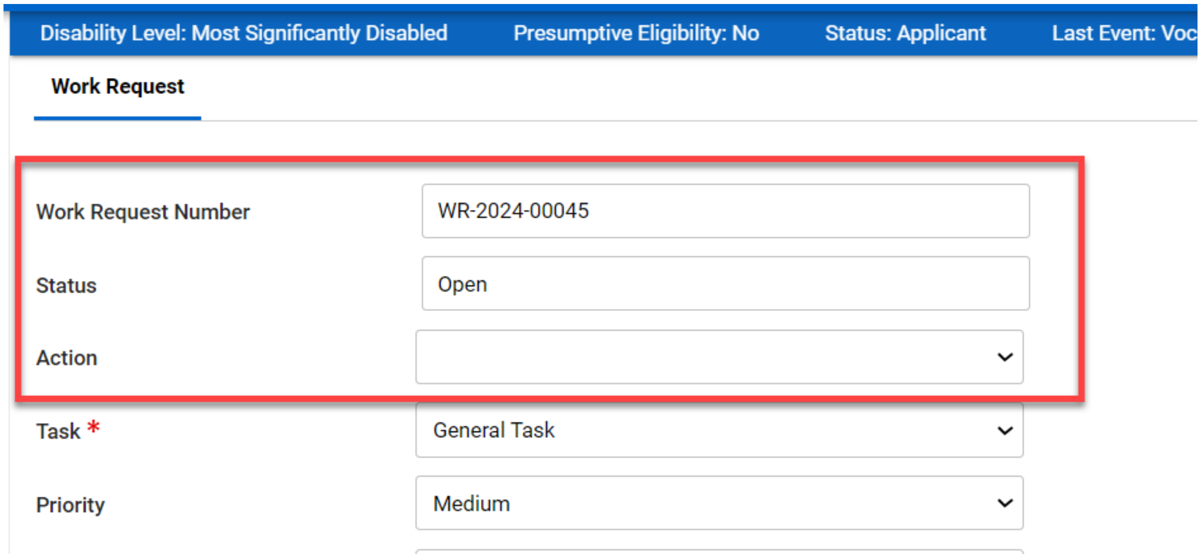


Figure 12-13 Work Request Form

The Work Request Number is auto-populated by the system and cannot be changed. The Status is also auto-populated by the system and will populate based on where in the workflow the work request resides.

19. The staff will need to choose an action from the Action drop-down.

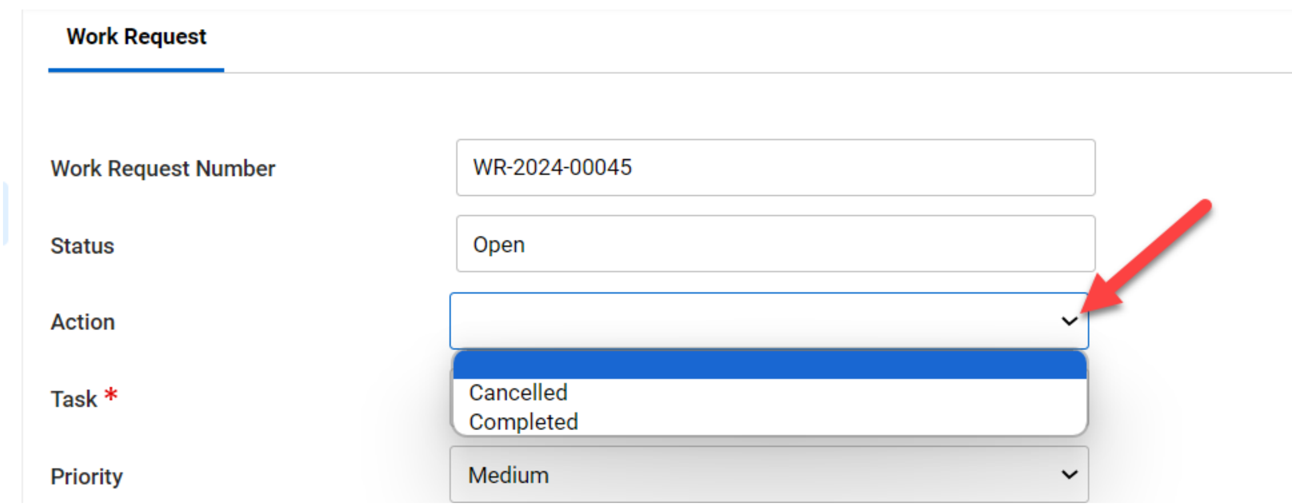


Figure 12-14 Work Request Action

20. Choosing Cancelled will Cancel the work request. Choosing Completed will reflect that all tasks required have been completed.

21. Click **Save**.

22. The screen will refresh and take the user back to the Work Request Listing. The work request will display and the status will reflect Completed (or canceled).

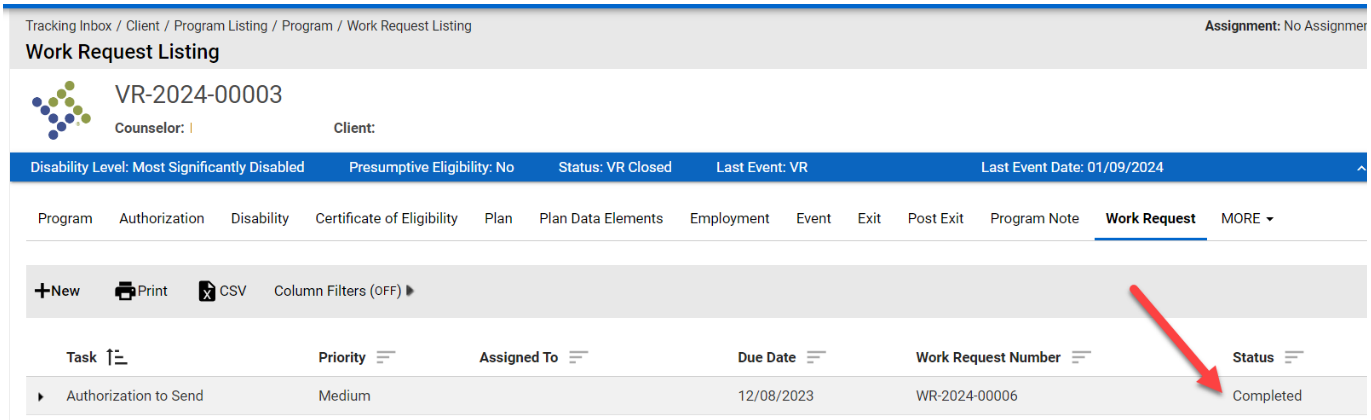


Figure 12-15 Work Request Status

13 Payments

Note: The payment interface is coming in Phase II and not documented here. This section covers how to enter a payment into the CMS system only.

13.1 Payments

1. As a Fiscal Clerk, navigate to the Authorization that is ready to have a payment applied. This can be done two ways either through the **Tracking Inbox** on the left menu or through the **Client** > **Program** > **Plan**. For this example, the client's plan is used.

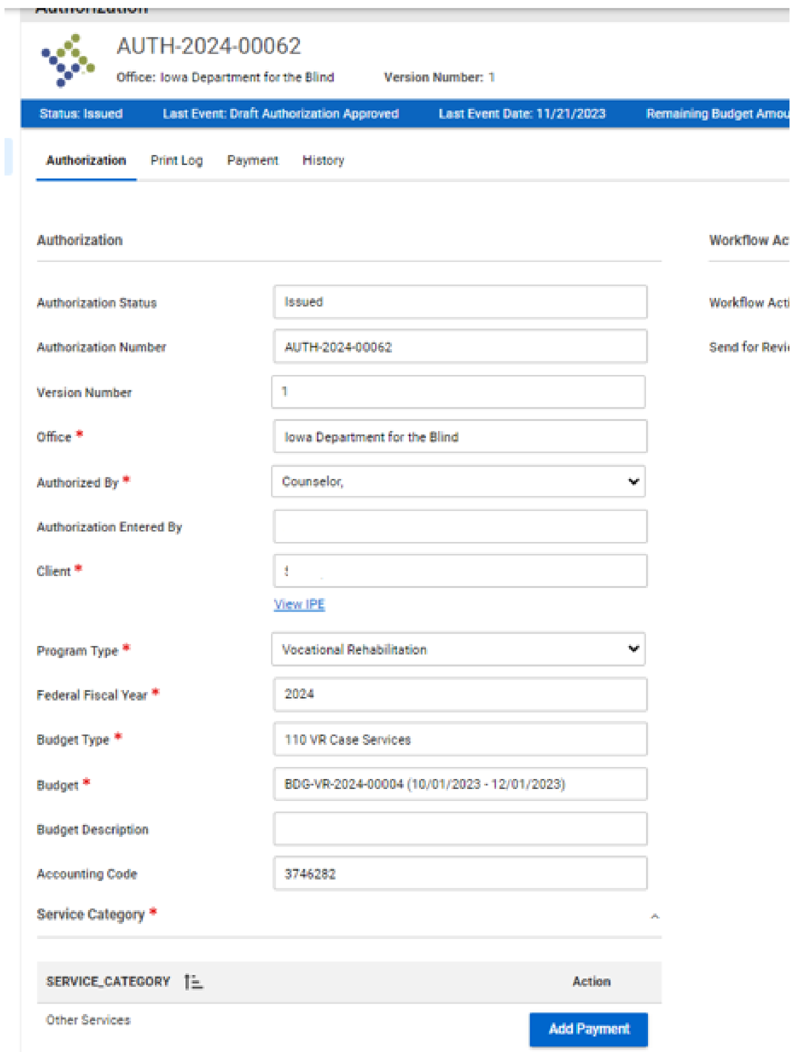


Figure 13-1 Authorization in a Status of Issued

Note: Authorizations have to be in a Status= Issued to have payments applied to them

2. Locate the **Add Payment** button under the **Service Category** section. Payments can only be applied to services listed on the authorization.

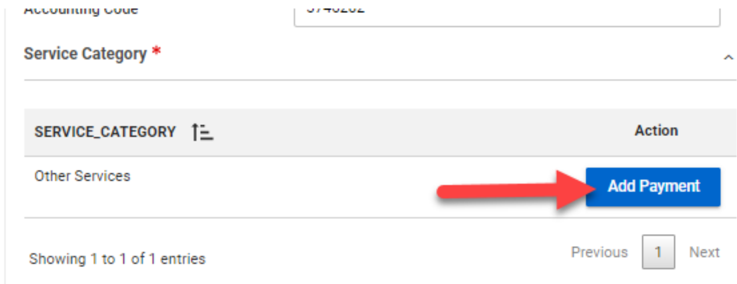


Figure 13-2 Add Payment Button on an Authorization

3.Click **Add Payment**.

4.The Payment Screen will display:

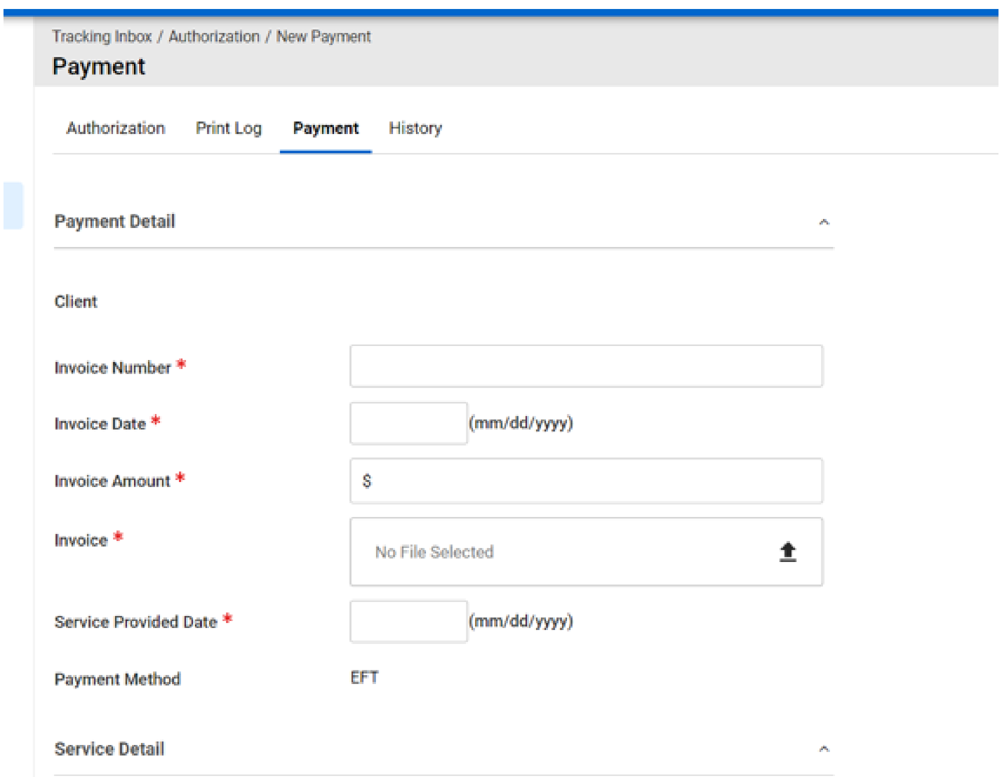


Figure 13-3 Payment Form

5.Enter in the required fields including uploading the Invoice file/document.

Note: The service provided date must fall within the parameters of the Authorization dates or user will get a Workflow Message.

Note: The Invoice Amount will update the Remaining Amount field automatically. If there is a balance remaining it will display, if paid in full it will be zero.

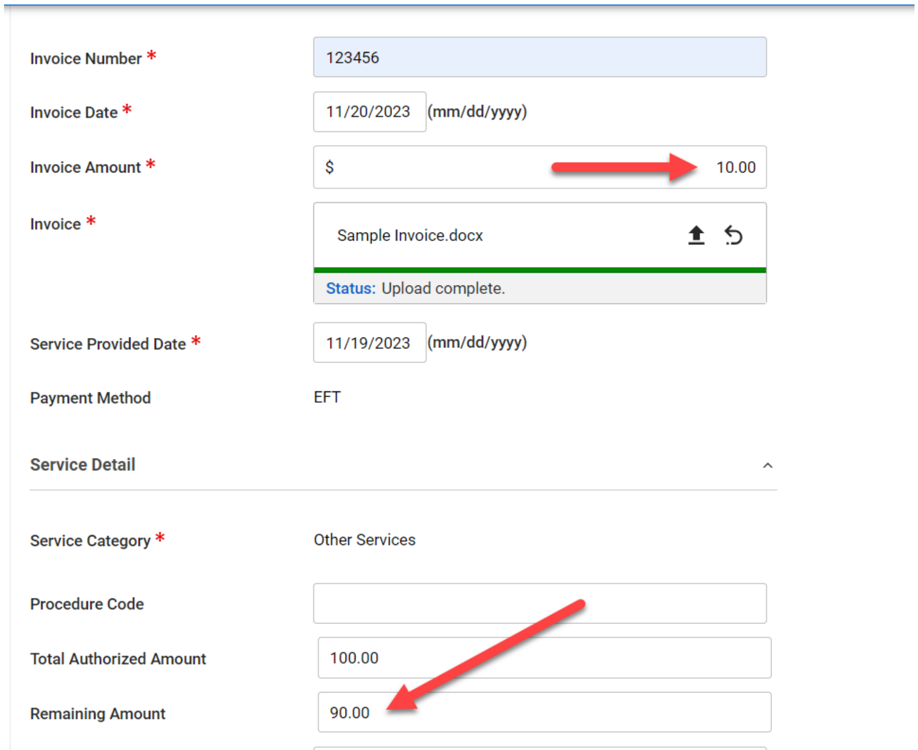


Figure 13-4 Invoice Amount

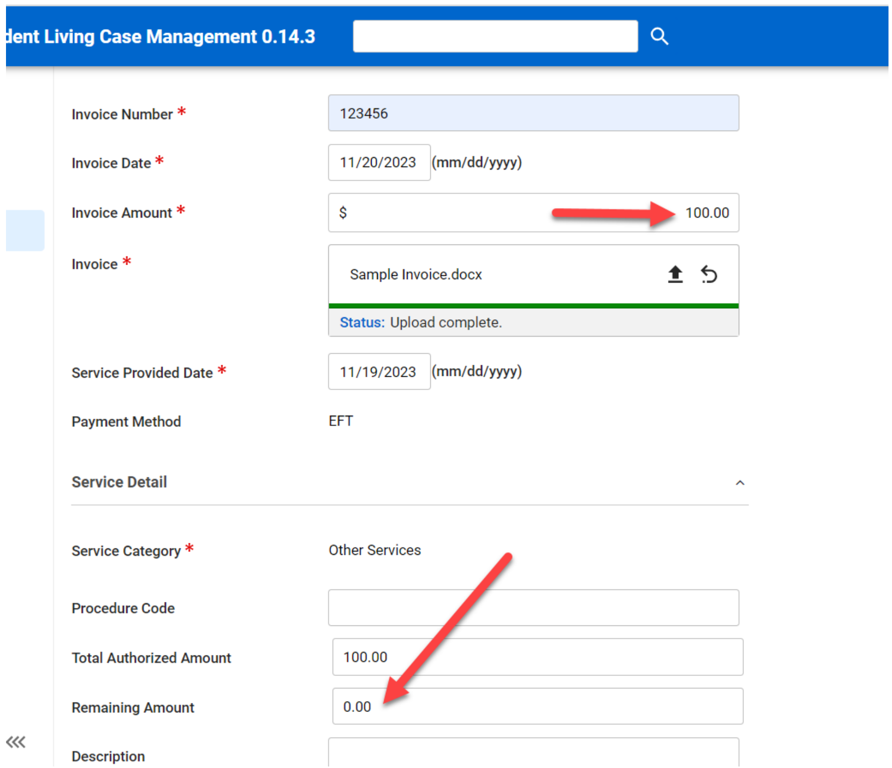


Figure 13-5 Remaining Balance Amount

6. After all required fields are populated in the Workflow Actions select **Submit for Review**.
7. A second field will populate labeled **Assign to Approver**:

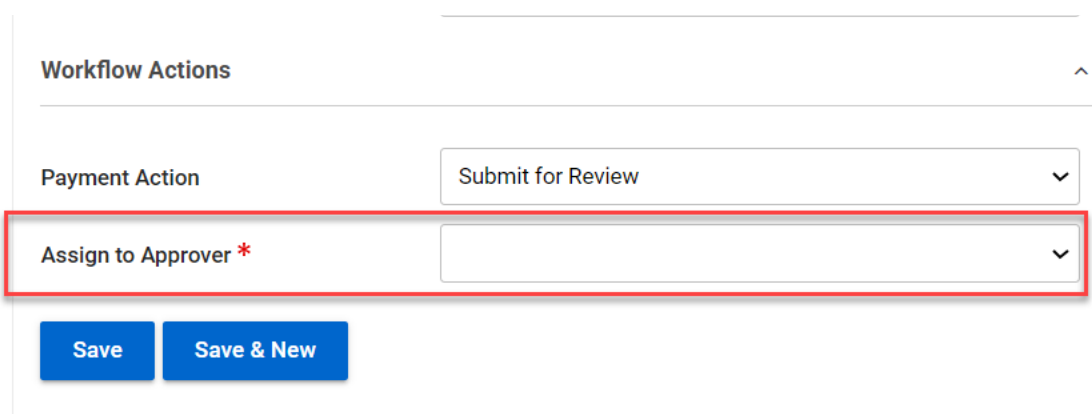


Figure 13-6 Assign to Approver Drop-Down

8. In the drop down select who the payment would need to be approved by:

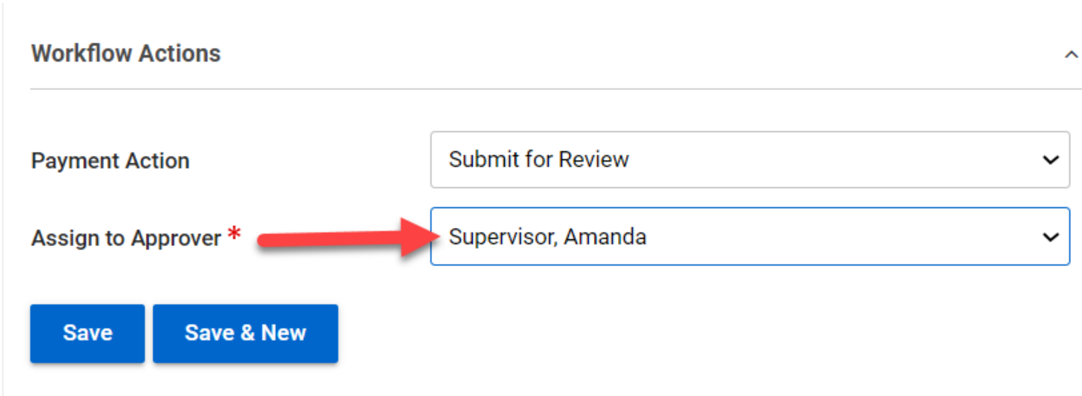


Figure 13-7 Assignee Chosen

9. Click **Save**.

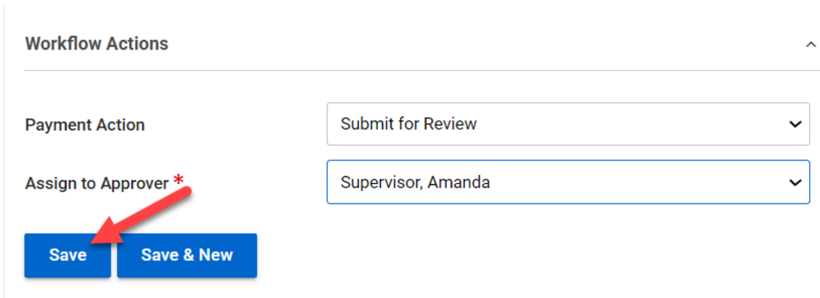


Figure 13-8 Save Button on Payment Form

10. The screen will refresh and display the Payment Detail screen.

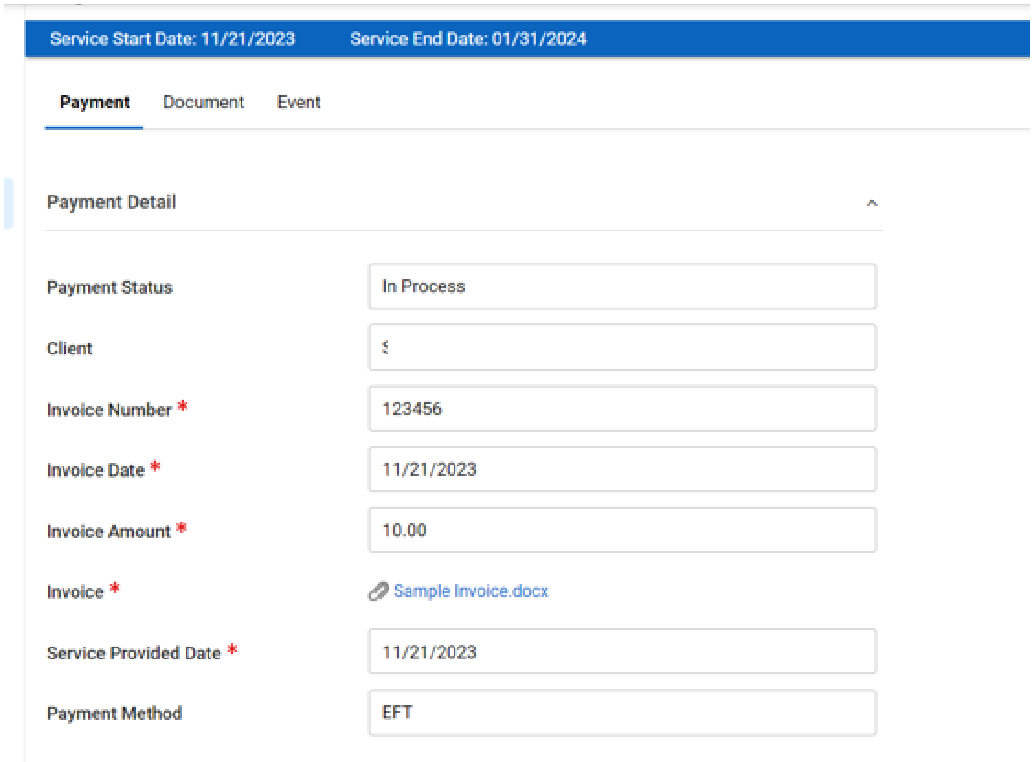


Figure 13-9 Payment Form Displaying Status

The Payment Status will be In Process.

11.Upon save an email was sent to the approver notifying them that a payment is ready to be approved on this Authorization.

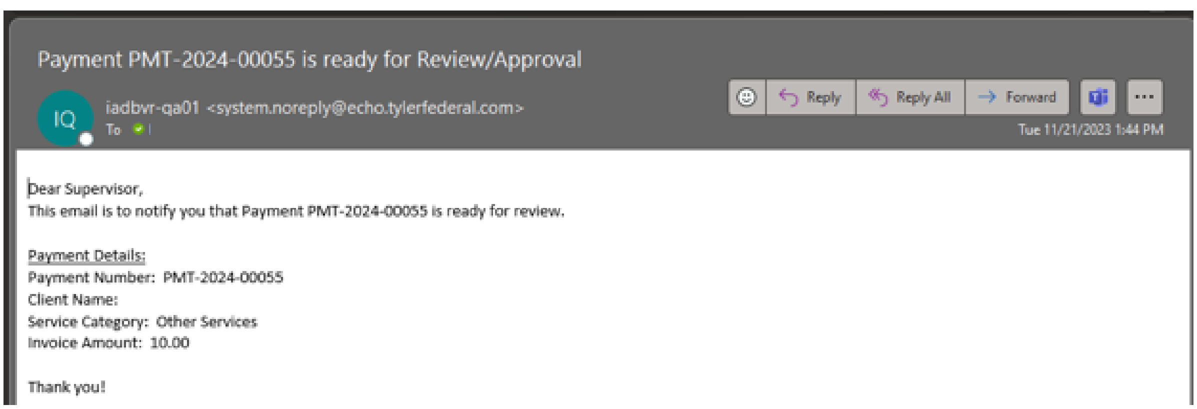


Figure 13-10 Email Notification to User

12. The Supervisor will now be required to approve the payment. To locate the payment requiring review and approval you can navigate to the Queues and choose Payments Pending Review.

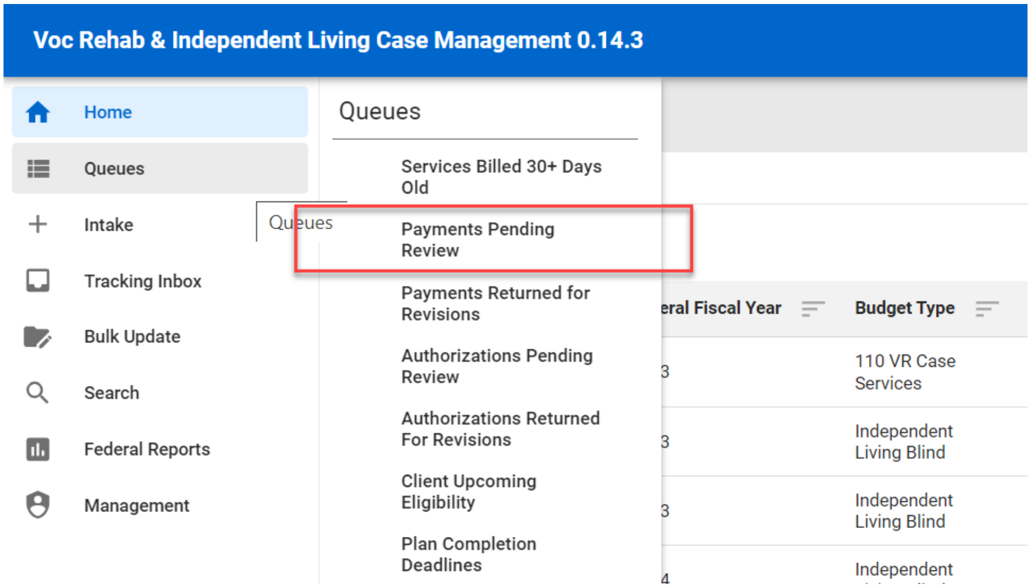


Figure 13-11 Menu > Payments Pending Review Queue

13.If this option is selected the Payments Pending Review queue will display and the payment will be in the table; clicking the payment record will take you to the Authorization where the payment has been applied:

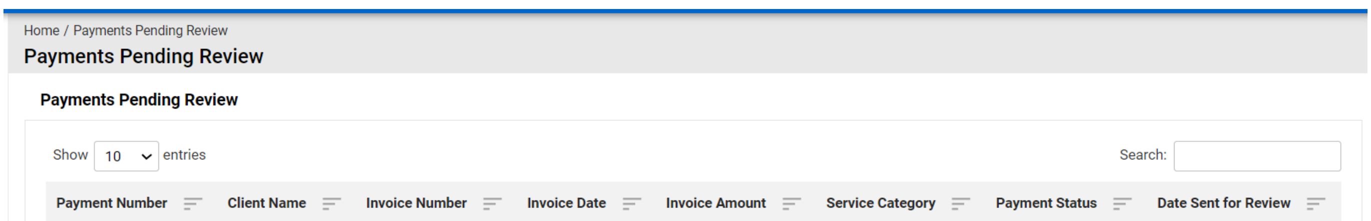


Figure 13-12 Payments Pending Review Queue Listing

14.Or, navigate to **Search**, click **Authorization**:

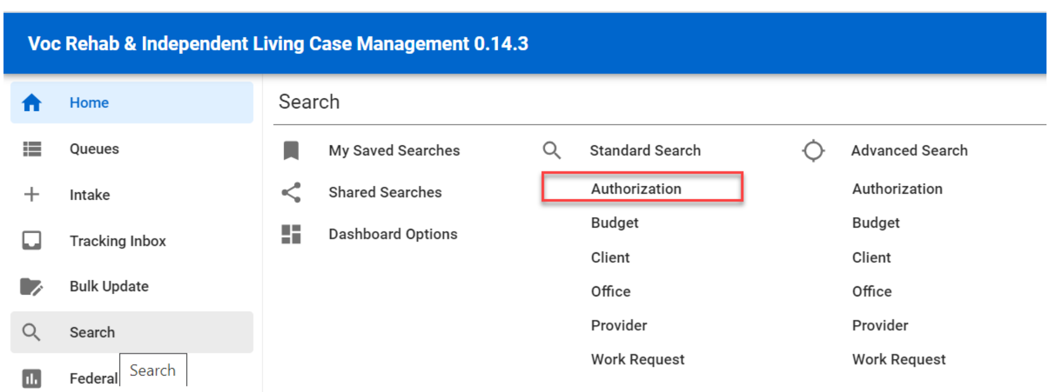


Figure 13-13 Search > Authorization

15.When the search criteria displays select the **Payment** checkbox and enter the **Payment Number** field with the Payment Number value located in the email:

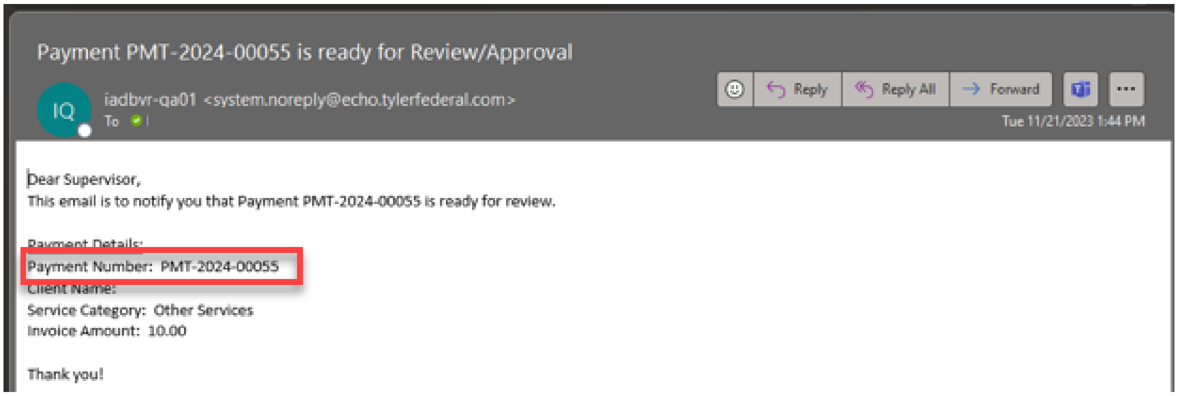


Figure 13-14 Payment Review Email

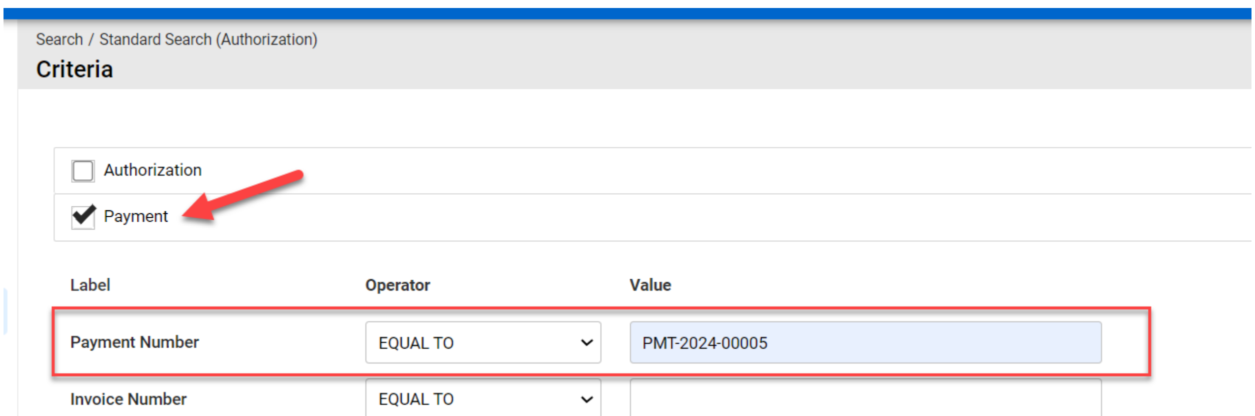


Figure 13-15 Search > Payment Number

16.Click **Search** and the payment will display in the Search Results. Clicking the payment record will take you to the Authorization where the payment has been applied.

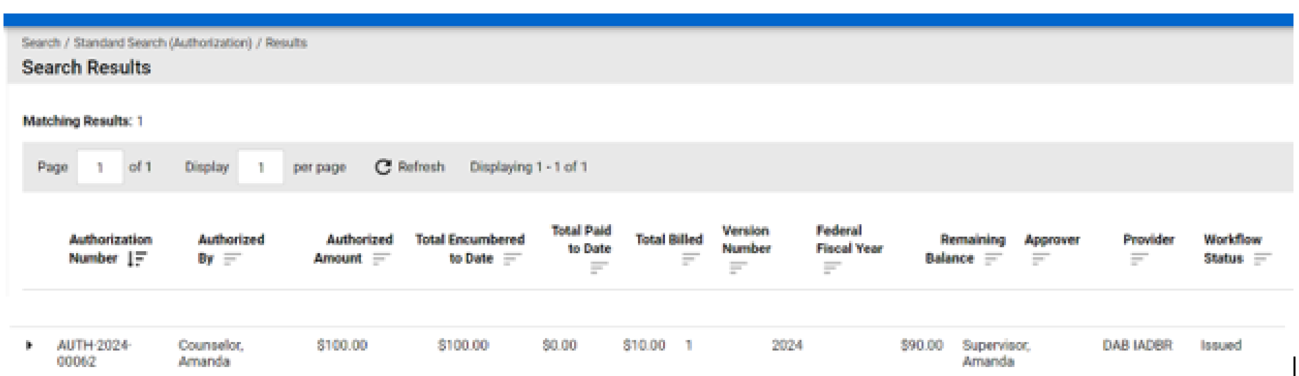


Figure 13-16 Authorization Search Display

17.On the **Authorization** screen near the top are tabs, click the **Payment** tab.

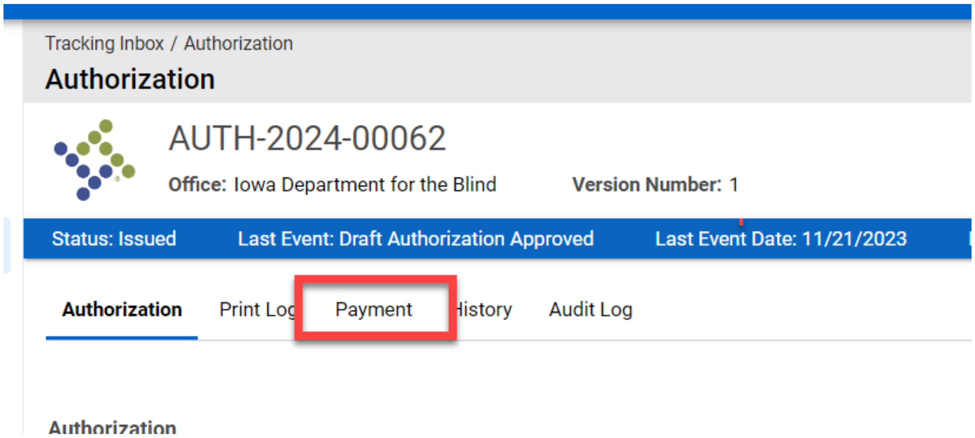


Figure 13-17 Authorization Payment Tab

18.The Payment Listing will display:

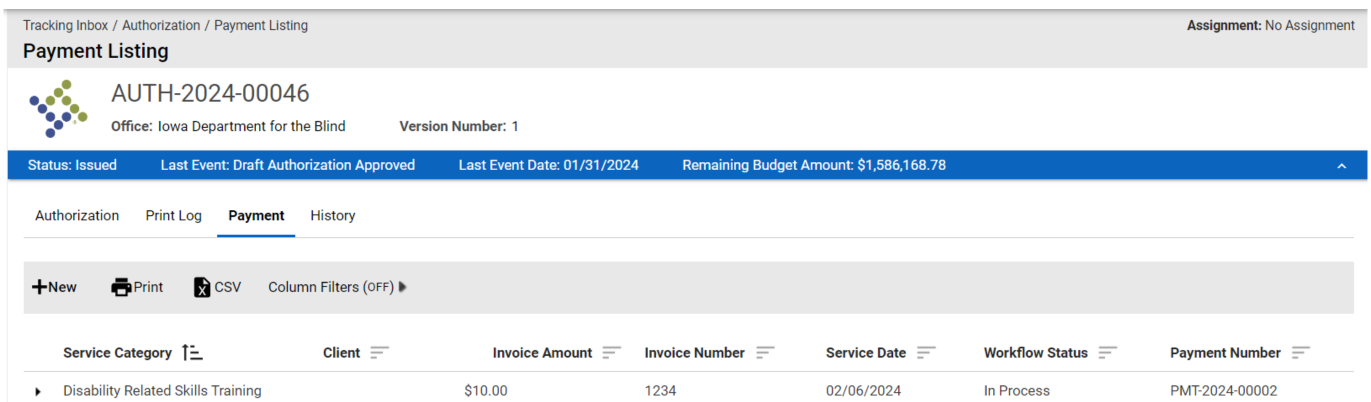


Figure 13-18 Payment Listing

19.Click the **payment record** needing approval; the Payment record will display:

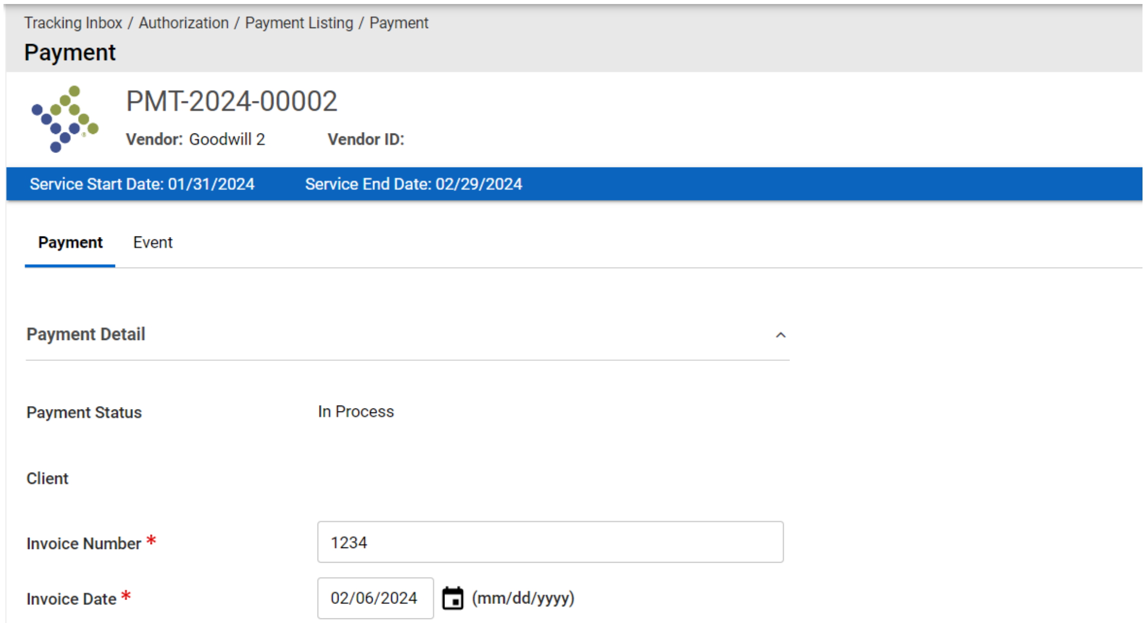


Figure 13-19 Payment Record

20.Verify all information entered is correct. Scroll down to the **Workflow Actions** section and in the Payment Action drop down select the appropriate action from Return for Revisions, Ready for Payment or Payment Canceled. For this example, **Ready for Payment** is chosen.

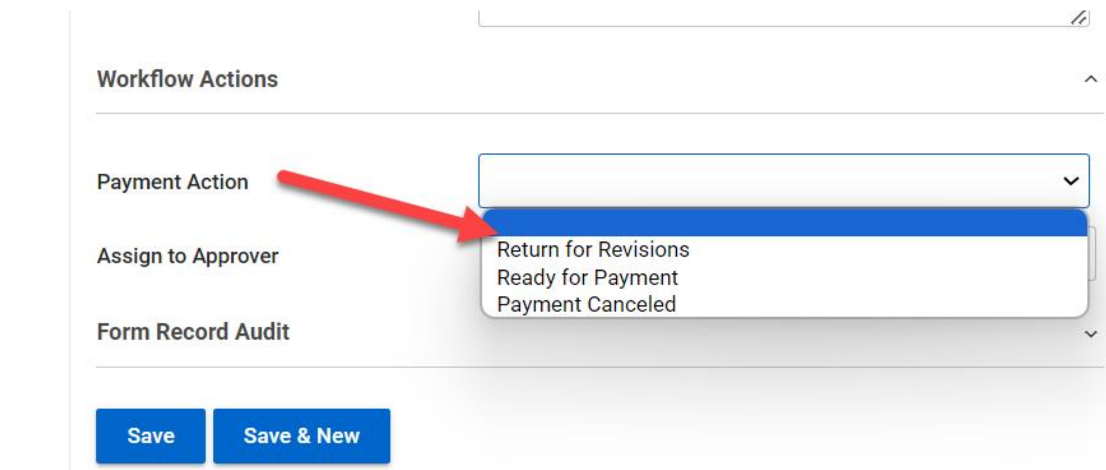


Figure 13-20 Payment Workflow Actions

Note:

If **Return for Revisions** is chosen, this will send the payment back to whoever entered it to revise as needed.

If **Payment is cancelled** an additional box will display labeled 'Cancel Reason' and it is a required field. This is a drop-down box.

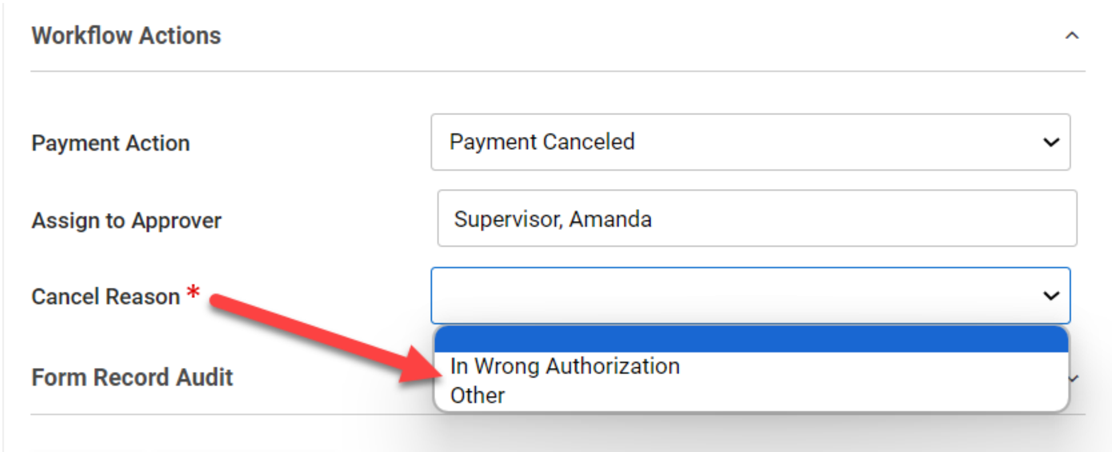


Figure 13-21 Cancel Reason Drop-Down

If the Cancel Reason and 'Other' is selected an additional text box will display that requires the user to enter in the cancelation reason:

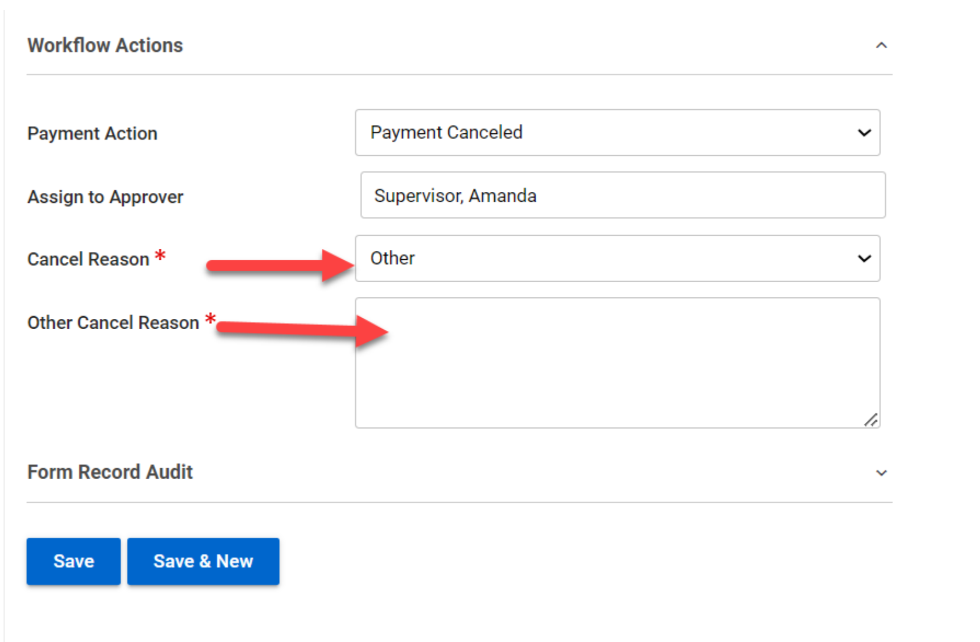


Figure 13-22 Additional Text Box for Cancel Reason

Note: If the payment is canceled the user who entered the payment will receive an email notification.

21.Upon choosing **Ready for Payment**, choosing the **Assigned Approver** and clicking **Save** the **Password Confirmation** box will display. Enter in the password used to log into the system and click **Ok**.

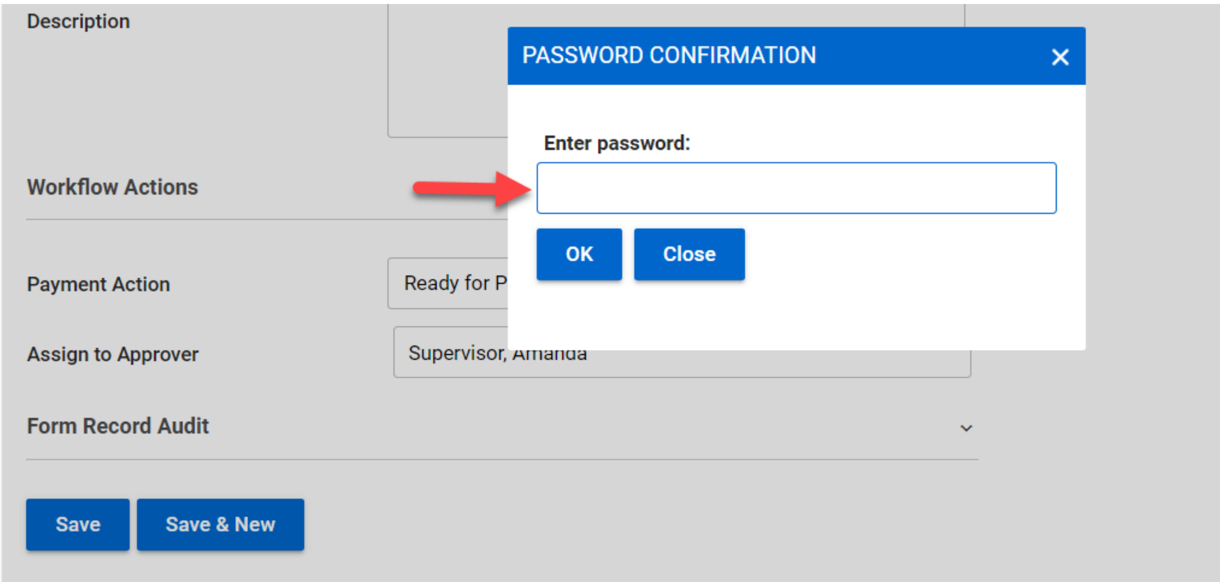


Figure 13-23 Password Prompt

22.The Payment screen will refresh and the Payment Status will be Ready to Pay.

23.The system will send an email that the payment is in a Ready to Pay status to Fiscal Staff.

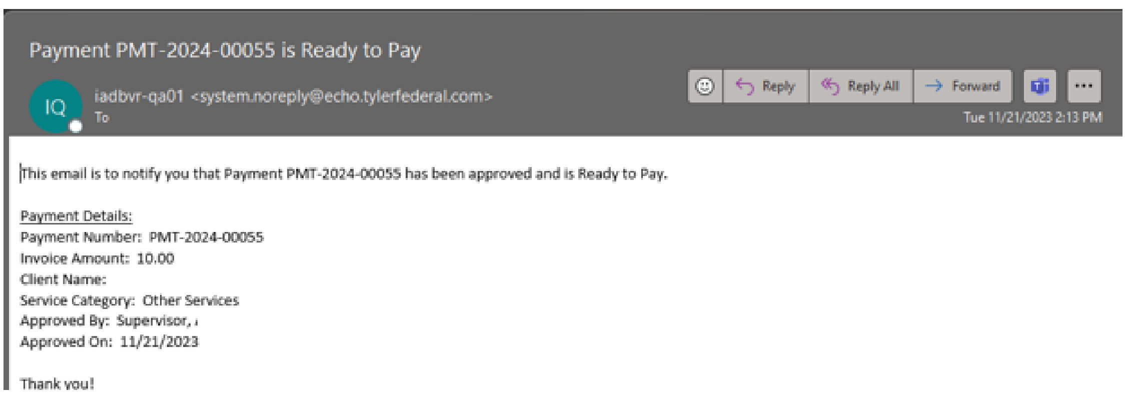


Figure 13-24 Email for Ready to Pay

24.As fiscal staff. To navigate to the payment that is Ready to Pay; this can be done a few ways for this example it is being accessed through the Home Screen view in the Payments Ready to Pay section.

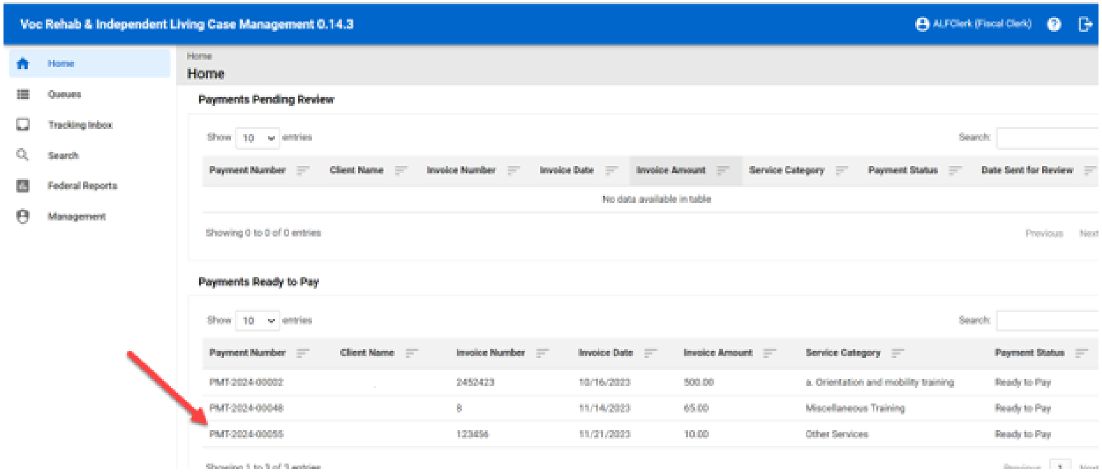


Figure 13-25 Payments Pending Review Queue

25.Click **the record**.

26.The Payment screen will display.

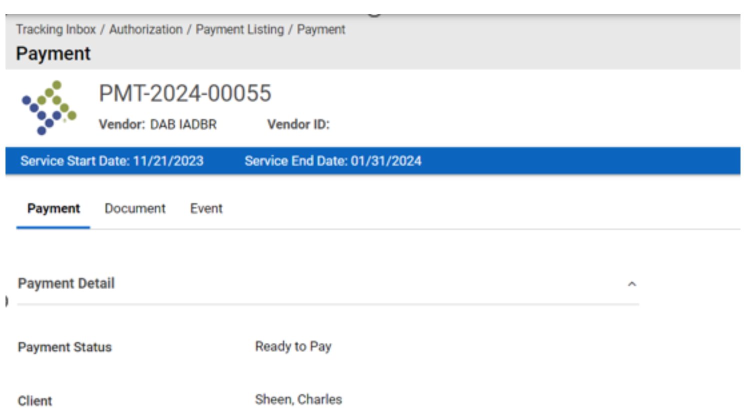


Figure 13-26 Payment Record

27.Scroll to the **Workflow Actions** near the bottom of the screen and in the **Payment Action** drop-down select the appropriate value. For this example, **Payment Submitted** is selected:

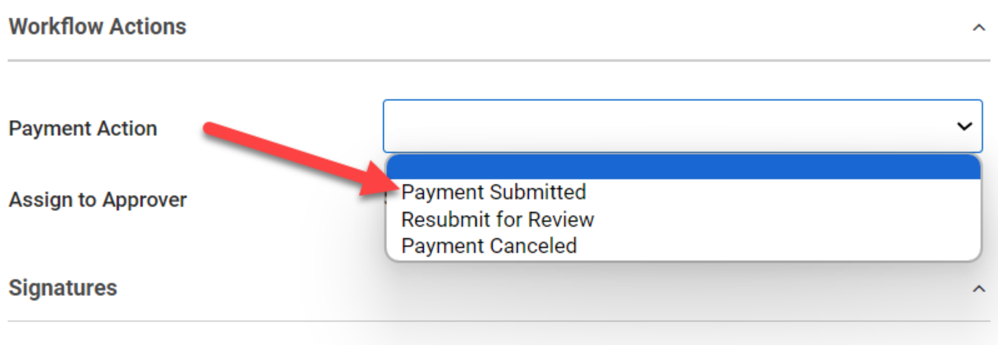


Figure 13-27 Payment Workflow Actions

28.Click **Save**.

29.Upon clicking save the screen will refresh and the Payment Status will now be Submitted.

30.When the payment is ready to be processed and the payment to reflect a status of Final Paid (still as Fiscal Staff) scroll to the **Workflow Actions** on the Payment screen and choose the **Payment Action** drop-down for **Final Paid**.

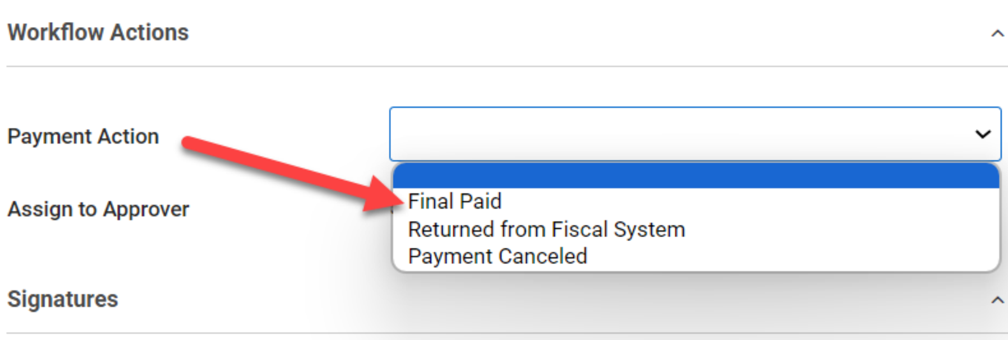


Figure 13-28 Payment Workflow Actions

Note:

Additional options include Returned from Fiscal System and Payment Canceled. Like previously if any of these options are chosen it will trigger a notification to the user who entered the payment to either make revisions for whatever the needed reason is, or, the payment has been canceled and will not be applied.

31.Once **Final Paid** is selected two new boxes will display labeled Warrant Number where the check number is to be entered and Warrant Date which is a calendar picker field:

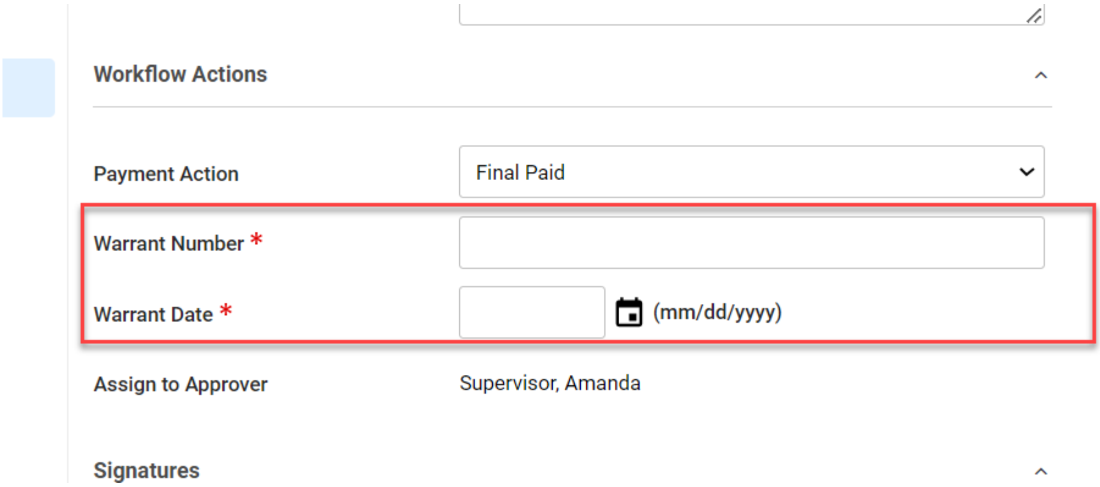


Figure 13-29 Additional Fields Display: Warrant Information

32. Fill in the newly required fields.

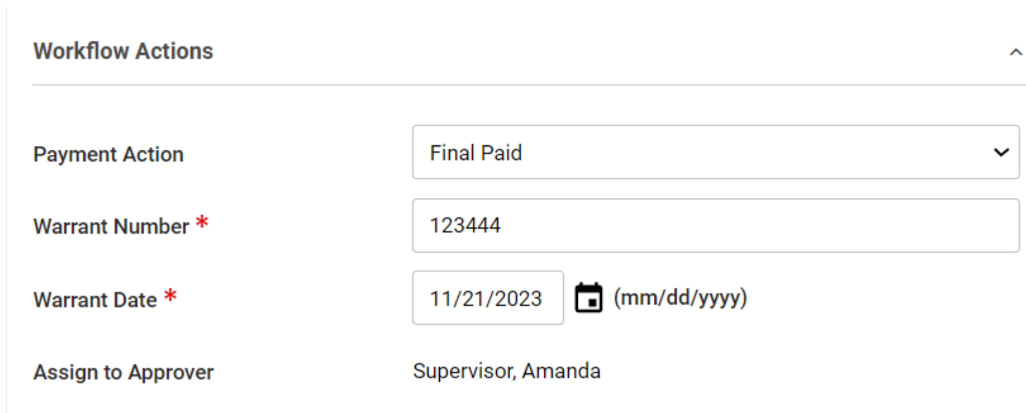


Figure 13-30 Payment Workflow Actions

33. Click **Save**.
34. The window will refresh and the Payment Status will now reflect Final Paid. This task is complete.

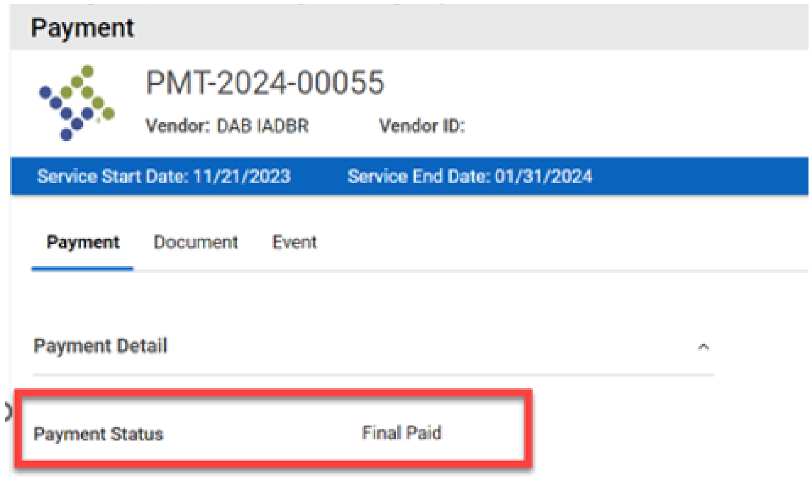


Figure 13-31 Payment Status

35.At the top of the Payment screen are two additional tabs: **Document** and **Event**.

36.Click **Document**, this will display documents that have been associated to this payment such as the invoice.

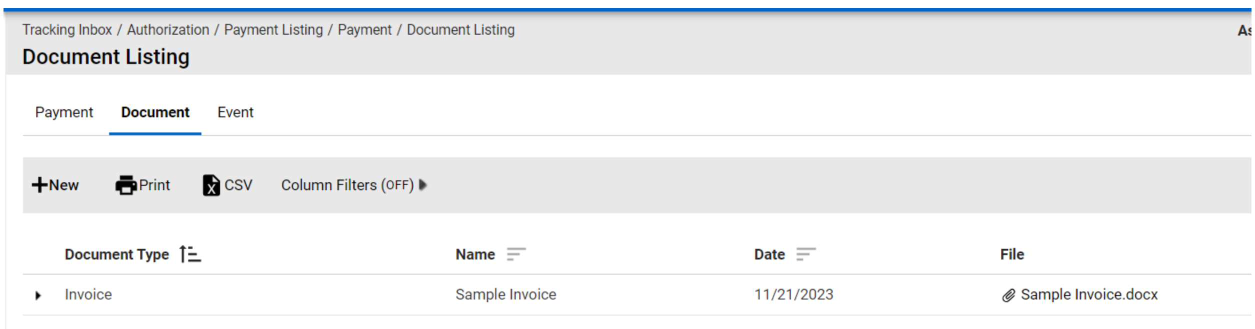


Figure 13-32 Document Listing

37.Click the **Event** tab, it will display all events related to this payment:

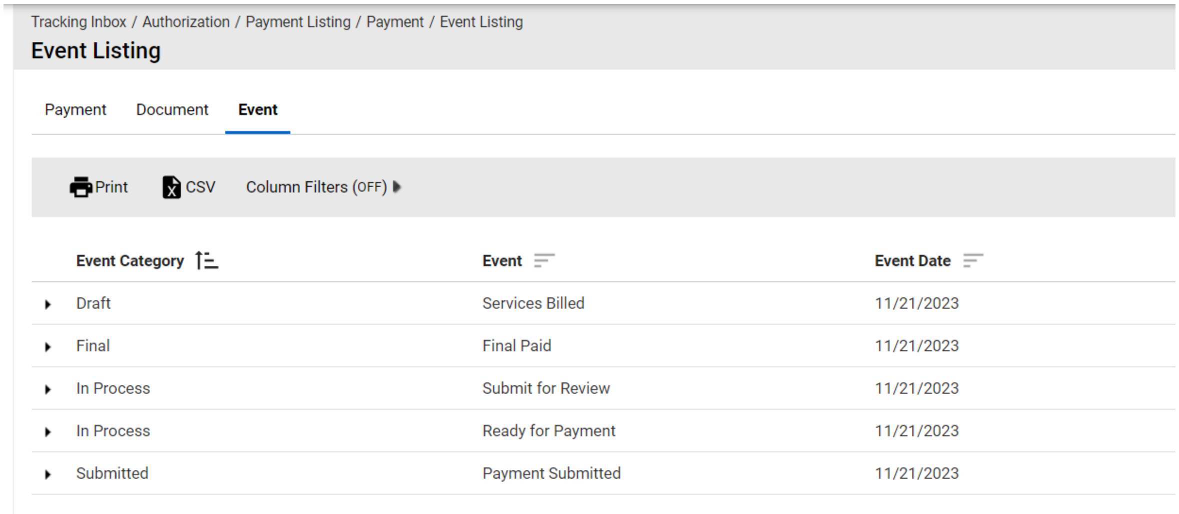


Figure 13-33 Payment Event Listing

Note: The payment interface with the new payment system will be in future User Guide updates - Post Go-Live

14 Queues

Queues are used to display relevant records to the specific user and alert them to which records need to be processed, assigned, or other actions.

Not all queues are available to all users; queues vary depending on a user's role in the system.

Note: Clicking any client record in the queue will take the user to the Client's Program Form

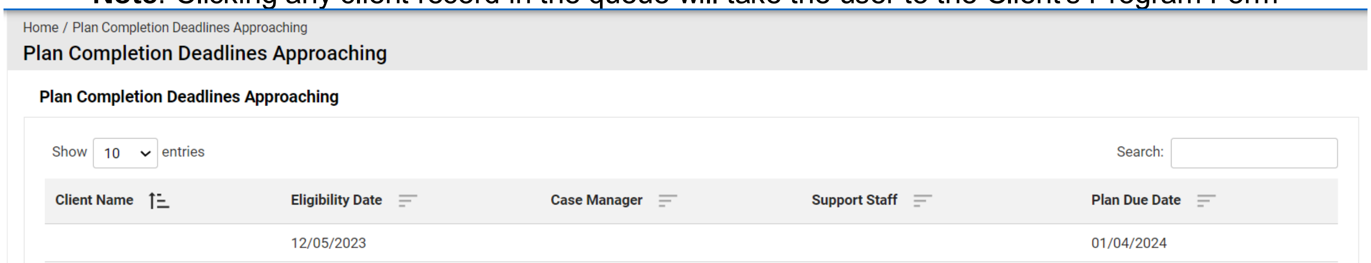


Figure 14-1 Queue Displayed

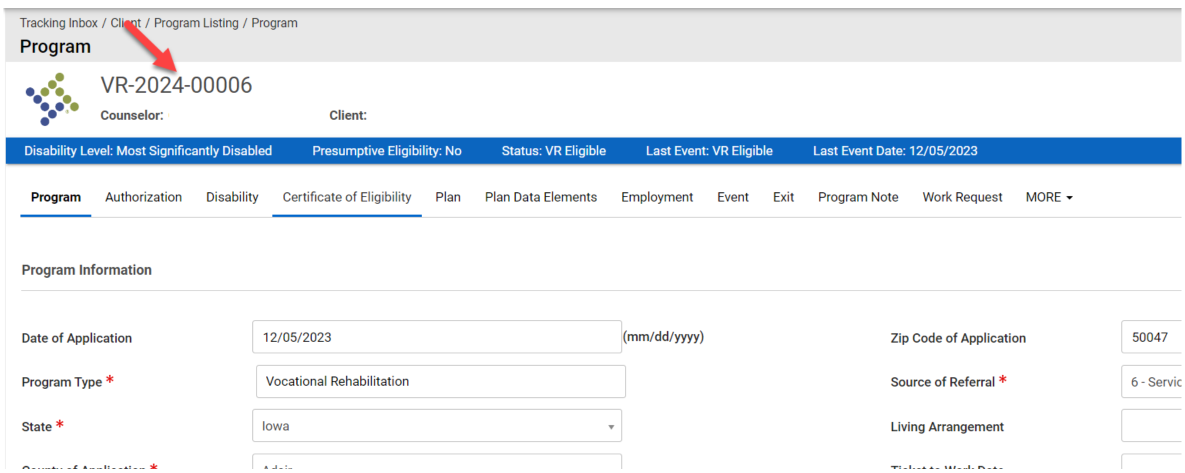


Figure 14-2 Program Display from Clicking Record in Queue

14.1 Annual Reviews Approaching

This queue displays all clients who have an annual review approaching.

Features

- Ability to search for specific clients whose annual review is approaching and are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system provided account
2. Navigate to the menu on the left side of the screen and hover over the Queues link.
3. The Queue menu will expand and the queues available to the Case Manager role will display.
4. Navigate down to the ‘Annual Reviews Approaching’

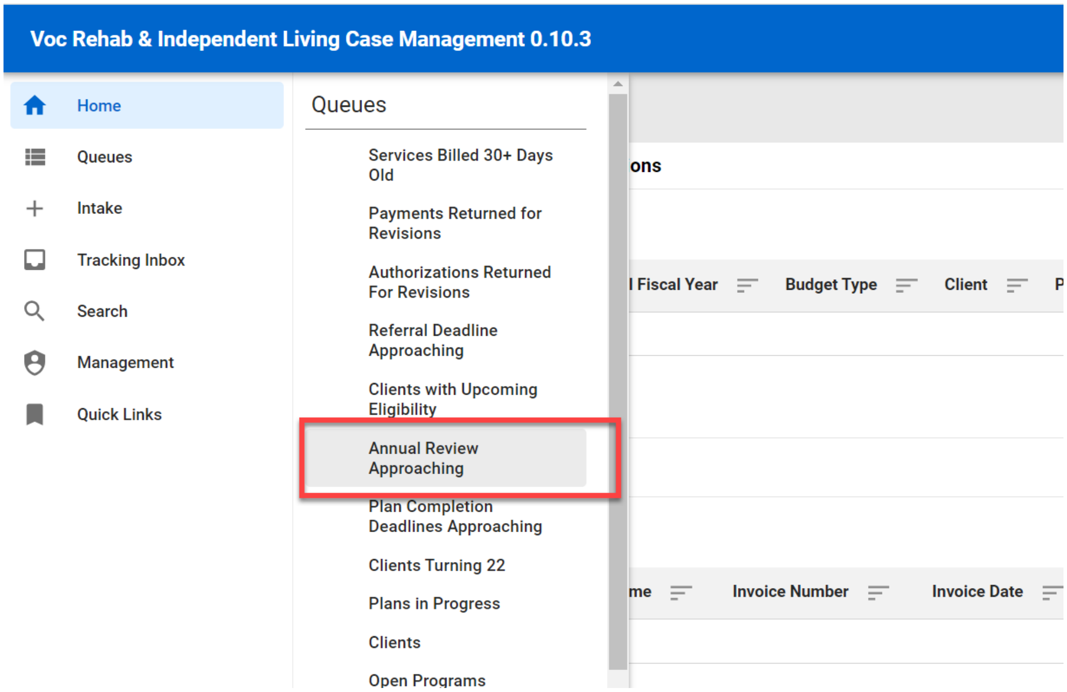


Figure 14-3 Menu > Annual Review Approaching Queue

5. Click on **Annual Review Approaching** and the queue will display.

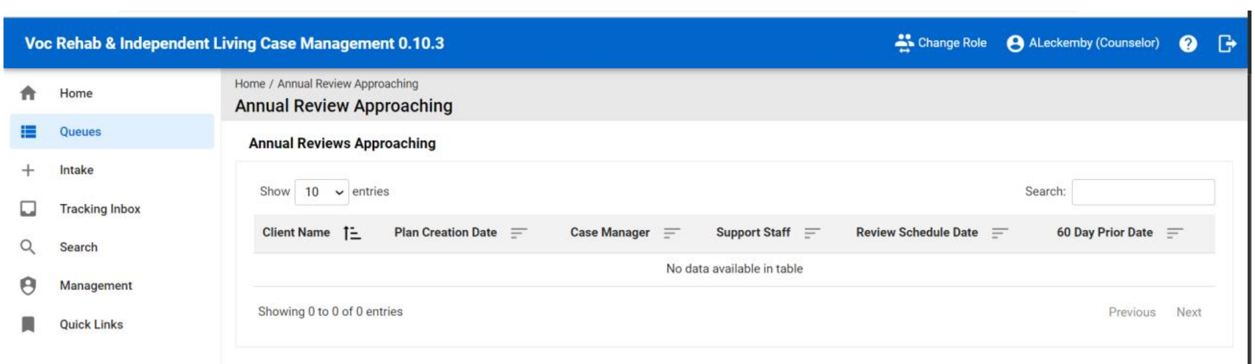


Figure 14-4 Annual Review Approaching Queue Listing

14.2 Authorizations Pending Review

This queue displays all open authorization records that are currently pending review / approval.

Features

- Ability to search for specific Authorization records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system provided account that has a Case Manager or Supervisor role.

2. On the Left menu, hover over the Queue option on the main menu. All queues available to the are listed.

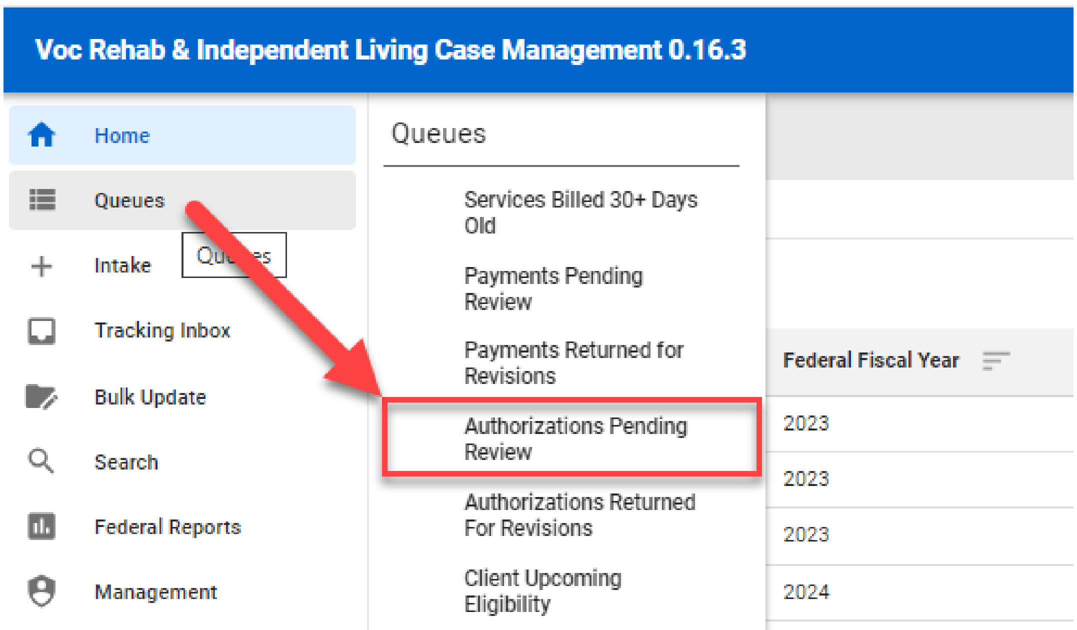
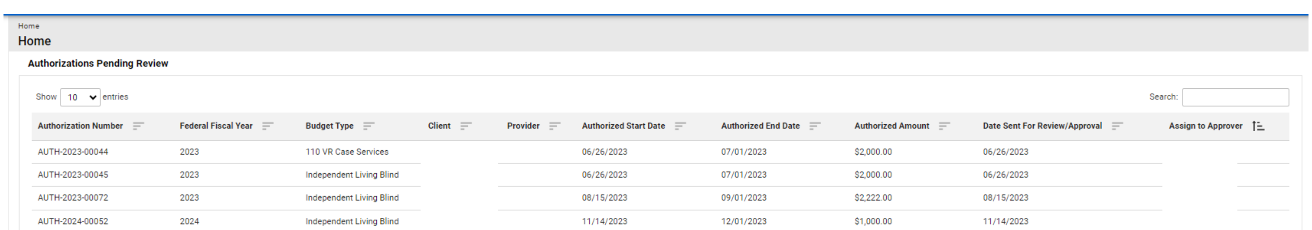


Figure 14-5 Menu > Authorizations Pending Review

3. The Authorizations Pending Review queue will display.



Home
Home
Authorizations Pending Review
Show 10 entries
Search:

Authorization Number	Federal Fiscal Year	Budget Type	Client	Provider	Authorized Start Date	Authorized End Date	Authorized Amount	Date Sent For Review/Approval	Assign to Approver
AUTH-2023-00044	2023	110 VR Case Services			06/26/2023	07/01/2023	$2,000.00	06/26/2023	
AUTH-2023-00045	2023	Independent Living Blind			06/26/2023	07/01/2023	$2,000.00	06/26/2023	
AUTH-2023-00072	2023	Independent Living Blind			08/15/2023	09/01/2023	$2,222.00	08/15/2023	
AUTH-2024-00052	2024	Independent Living Blind			11/14/2023	12/01/2023	$1,000.00	11/14/2023	

Figure 14-6 Authorizations Pending Review Queue Listing

14.3 Authorizations Returned for Revisions

This queue displays all open authorization records that have been returned for revisions.

Features

- Ability to search for specific Authorization records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.
- The user will see all Authorizations where they were the creator of the record, and it was returned to them. This queue would typically only apply to Case Manager but could apply to other roles if they create Authorizations.

1. Log in as a user with a role of Case Manager or Supervisor.
2. Navigate to **Queues** > **Authorizations Returned for Revisions**.

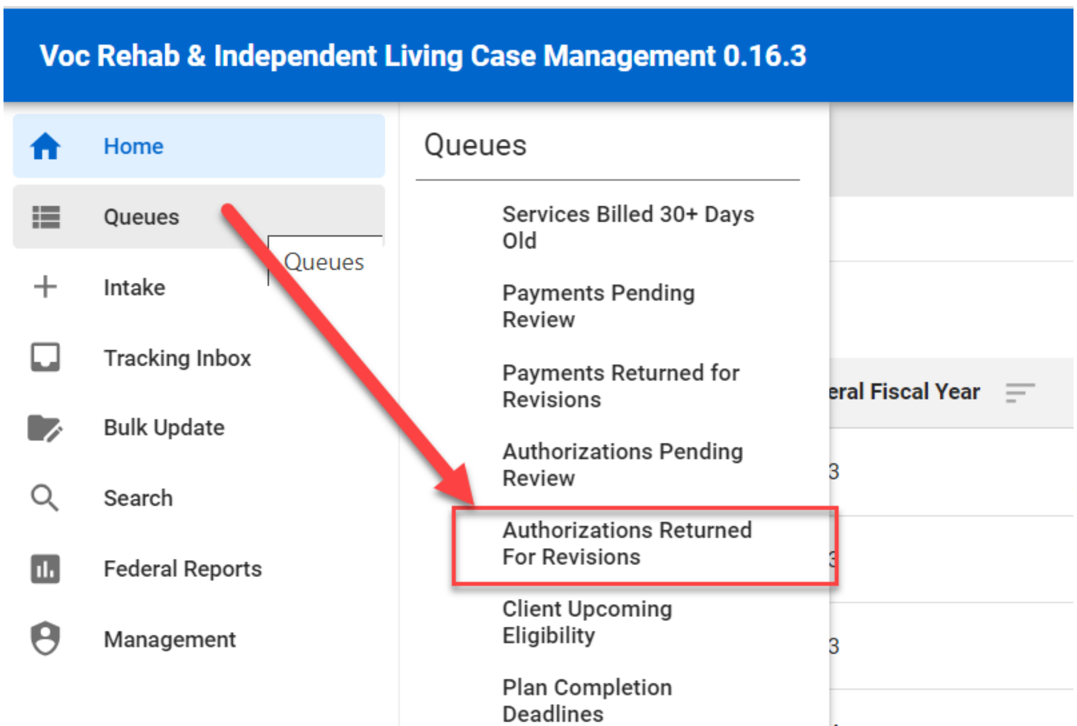


Figure 14-7 Menu > Authorizations Returned for Revisions

3. The Authorizations Returned for Revisions will display.

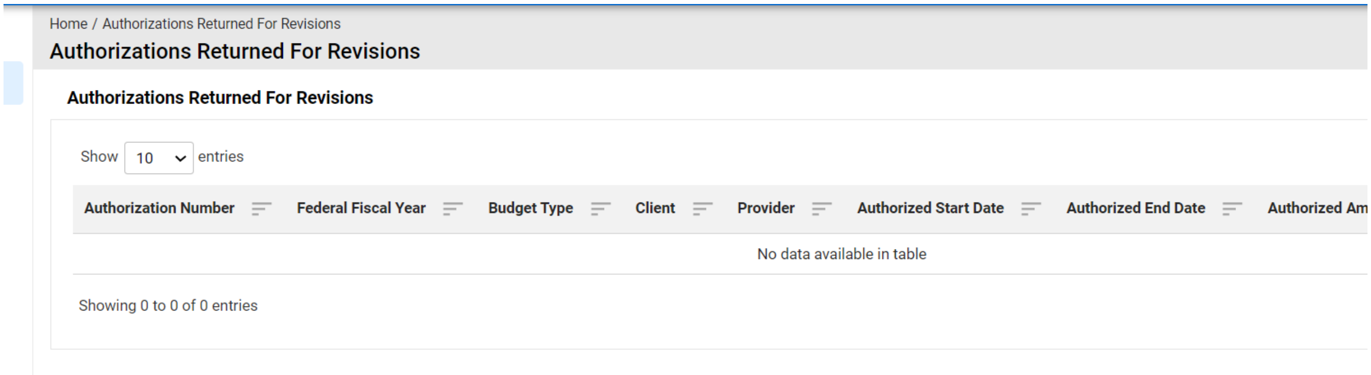


Figure 14-8 Authorizations Returned for Revisions Queue

14.4 Clients

The Clients queue displays all Client records in the system and is currently available for users with a either a role of Support Staff, Case Manager or Supervisor.

All clients are visible in the queue regardless of Client = Yes/No and/or program type. A support staff member, Case Manager and/or Supervisor can view all clients displayed in the queue. There are checks that a user cannot access a client record if they are in a program differing from the program, they have access to.

Features

- Ability to search for specific Client records that are displayed on the page.
- The data table paginates and shows 5 record by default but gives the user the ability to change it with options of 10, 25, 50, 100.
- Ability to sort by any column in the data table.
- The user can click on any record from the data table and it will take them directly into that Client record.

1. Log in as a user as Support Staff, Case Manager or Supervisor roles.
2. Navigate to **Queues** > **Clients**.

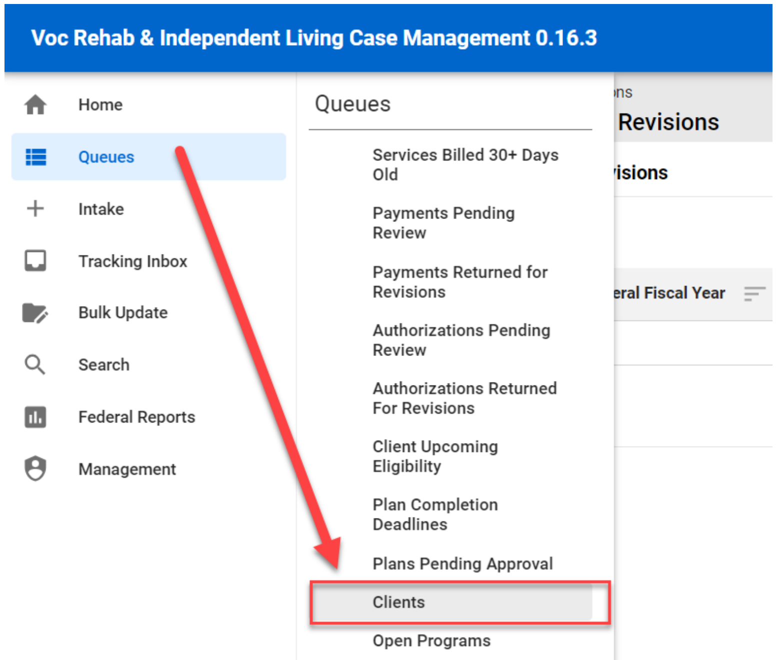
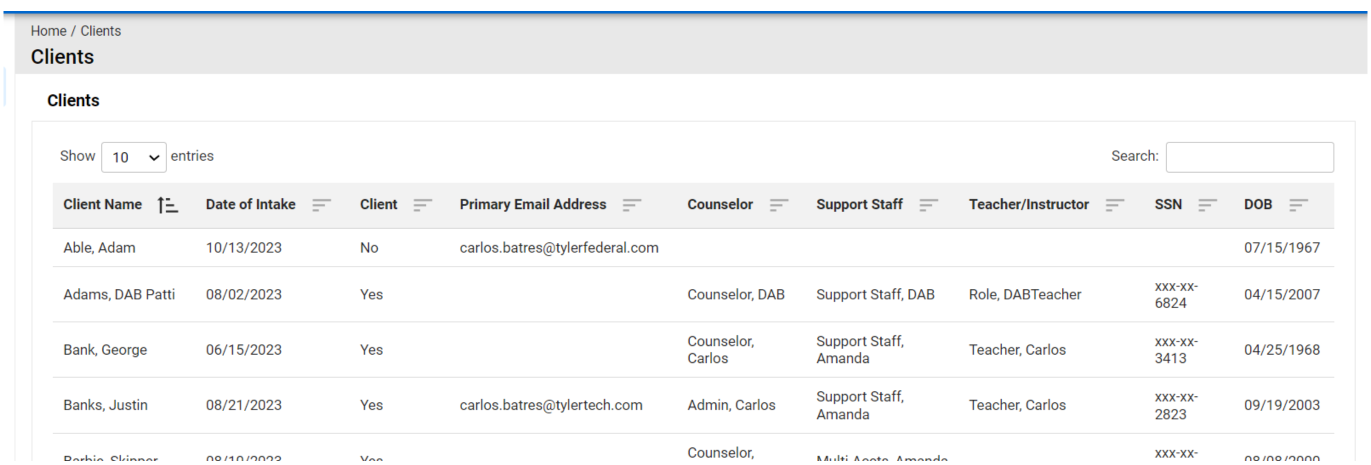


Figure 14-9 Menu > Client Queue

3. The Clients queue will display.



Client Name	Date of Intake	Client	Primary Email Address	Counselor	Support Staff	Teacher/Instructor	SSN	DOB
Able, Adam	10/13/2023	No	carlos.batres@tylerfederal.com					07/15/1967
Adams, DAB Patti	08/02/2023	Yes		Counselor, DAB	Support Staff, DAB	Role, DABTeacher	xxx-xx-6824	04/15/2007
Bank, George	06/15/2023	Yes		Counselor, Carlos	Support Staff, Amanda	Teacher, Carlos	xxx-xx-3413	04/25/1968
Banks, Justin	08/21/2023	Yes	carlos.batres@tylertech.com	Admin, Carlos	Support Staff, Amanda	Teacher, Carlos	xxx-xx-2823	09/19/2003

Figure 14-10 Client Queue Listing

14.5 Queues Available to the Teacher/Instructor Role

This displays all queues that are available to Teachers or Instructors.

1. Login with your system provided account that has a teacher role.

2. On the Left menu, hover over the Queue option on the main menu. All queues available to the teacher are listed.

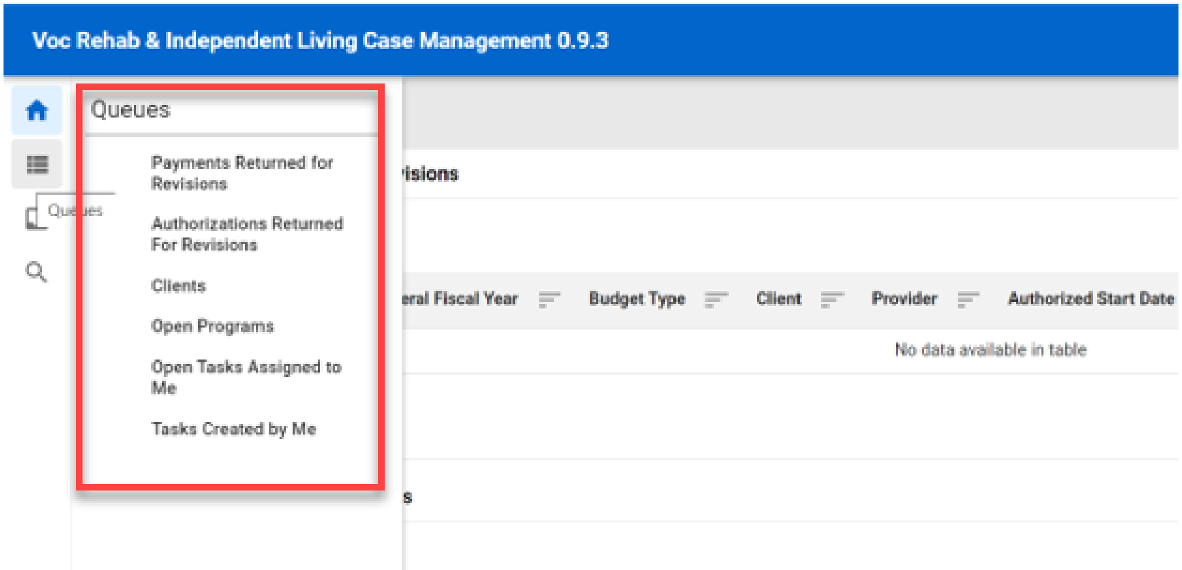


Figure 14-11 Menu > Queues Available to Teacher/Instructor

14.6 COE in Progress

The COE In Progress queue displays all certificate of eligibility records that are currently in progress.

Features

- Ability to search for specific COE records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.
- The user can click on any record from the data table and it will take them directly into that COE record.

1. Log in as a user with a role of Case Manager.
2. Navigate to **Queues** > **COE In Progress**

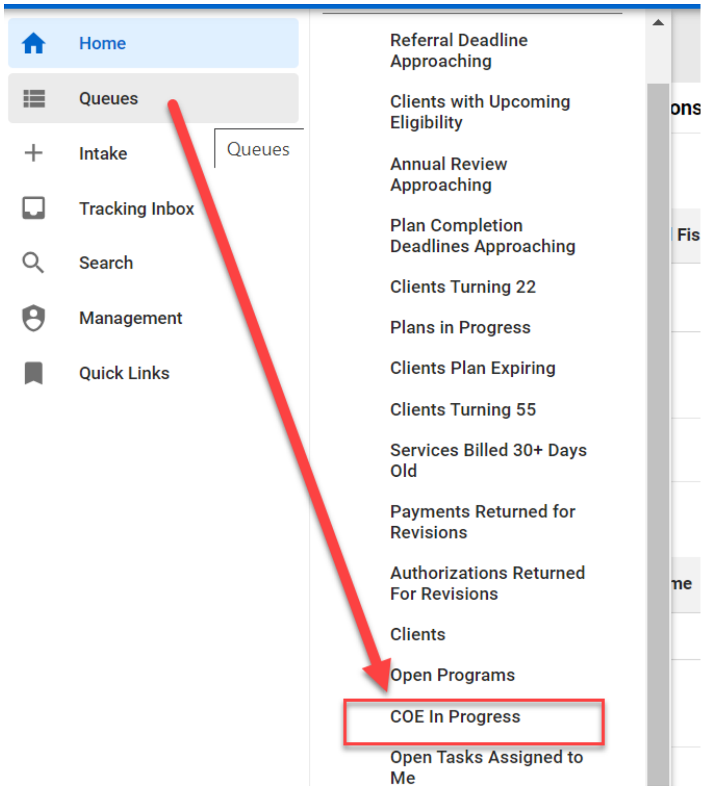
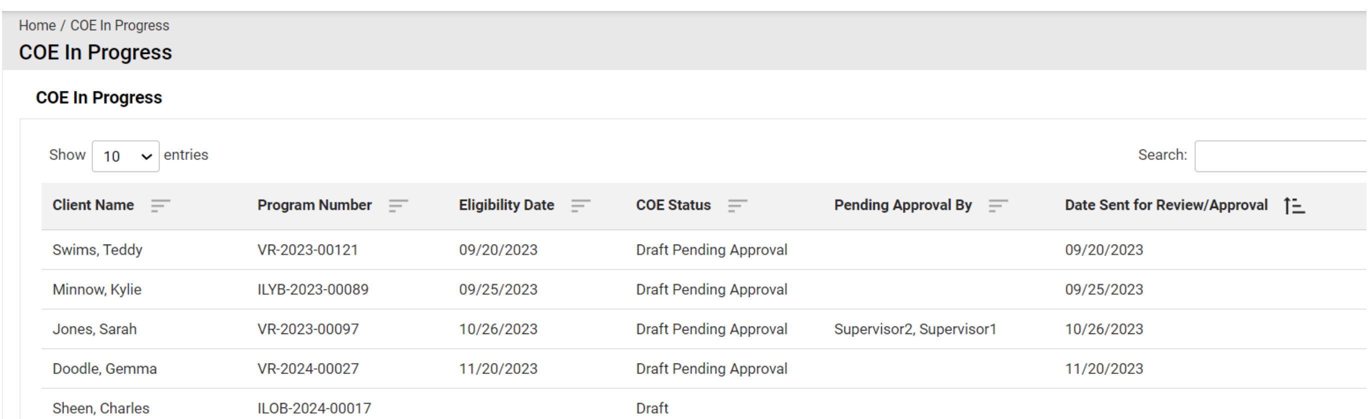


Figure 14-12 Menu > COE In Progress Queue

3. The COE In Progress queue will display.



Home / COE In Progress

COE In Progress

COE In Progress

Show 10 entries

Search:

Client Name	Program Number	Eligibility Date	COE Status	Pending Approval By	Date Sent for Review/Approval
Swims, Teddy	VR-2023-00121	09/20/2023	Draft Pending Approval		09/20/2023
Minnow, Kylie	ILYB-2023-00089	09/25/2023	Draft Pending Approval		09/25/2023
Jones, Sarah	VR-2023-00097	10/26/2023	Draft Pending Approval	Supervisor2, Supervisor1	10/26/2023
Doodle, Gemma	VR-2024-00027	11/20/2023	Draft Pending Approval		11/20/2023
Sheen, Charles	ILOB-2024-00017		Draft		

Figure 14-13 COE In Progress Queue Listing

14.7 COE Pending Approval

The COE Pending Approval queue displays all certificate of eligibility records that are currently pending approval by a supervisor.

Features

- Ability to search for specific COE records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.
- The user can click on any record from the data table and it will take them directly into that COE record.

1. Log in as a user with a role of Supervisor
2. Navigate to **Queues** > **COE Pending Approval**

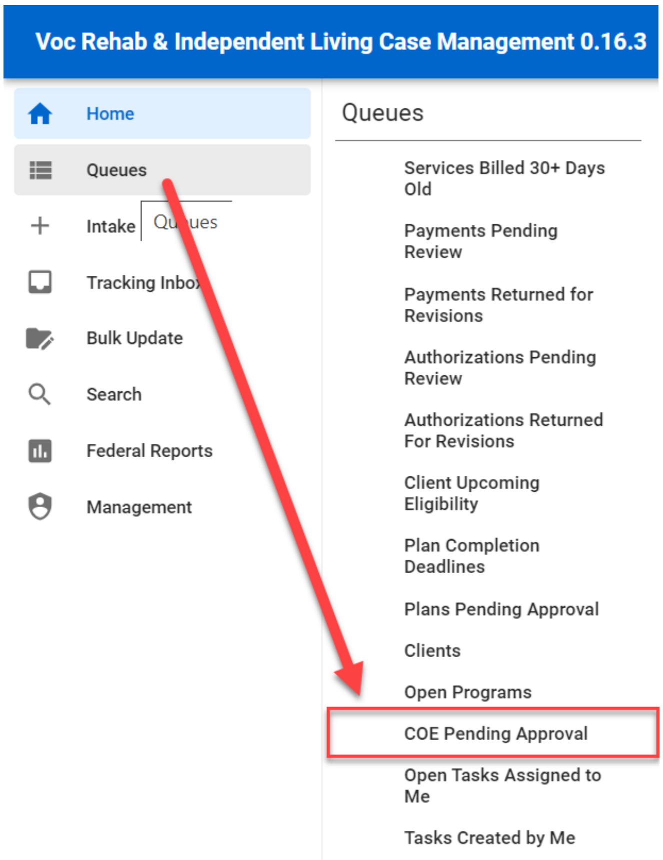


Figure 14-14 Menu > COE Pending Approval Queue

3. The COE Pending Approval queue will display.

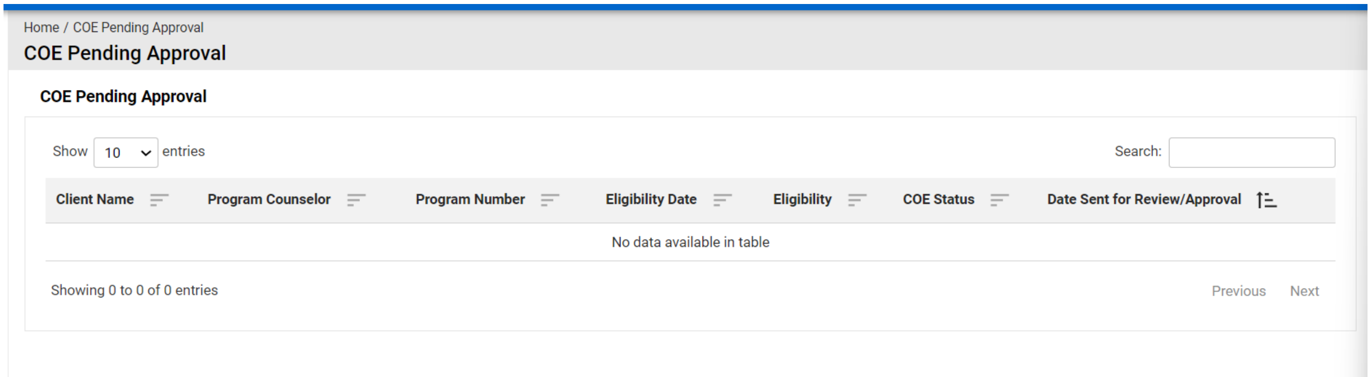


Figure 14-15 COE Pending Approval Listing

14.8 Open Programs

The Open Programs queue displays all program records that are currently not in a Closed state.

Features

- Ability to search for specific Program records that are displayed on the page.
- The data table paginates and shows 5 record by default but gives the user the ability to change it with options of 10, 25, 50, 100.
- Ability to sort by any column in the data table.
- The user can click on any record from the data table and it will take them directly into that Program record.

1. Log in as either a Support Staff, Case Manager or Supervisor.
2. Navigate to **Queues** > **Open Programs**.

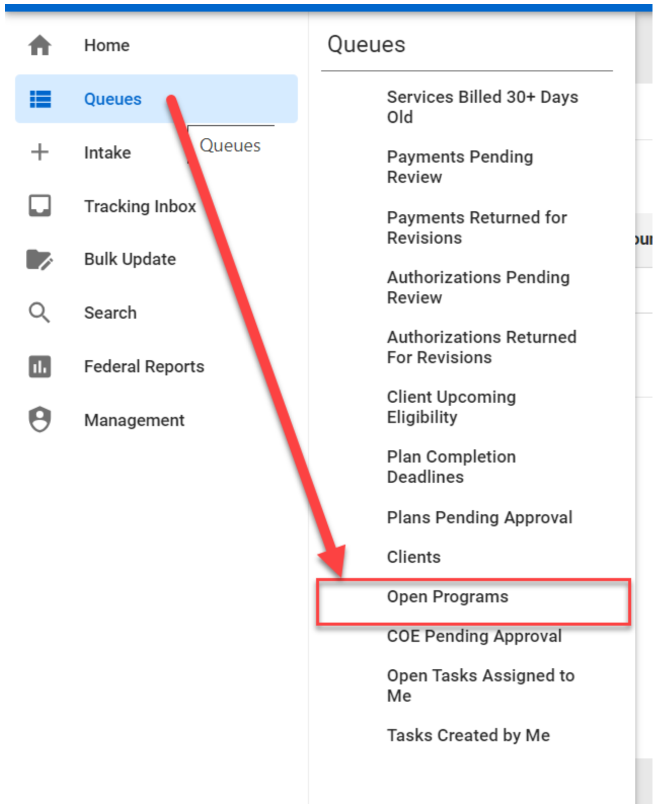
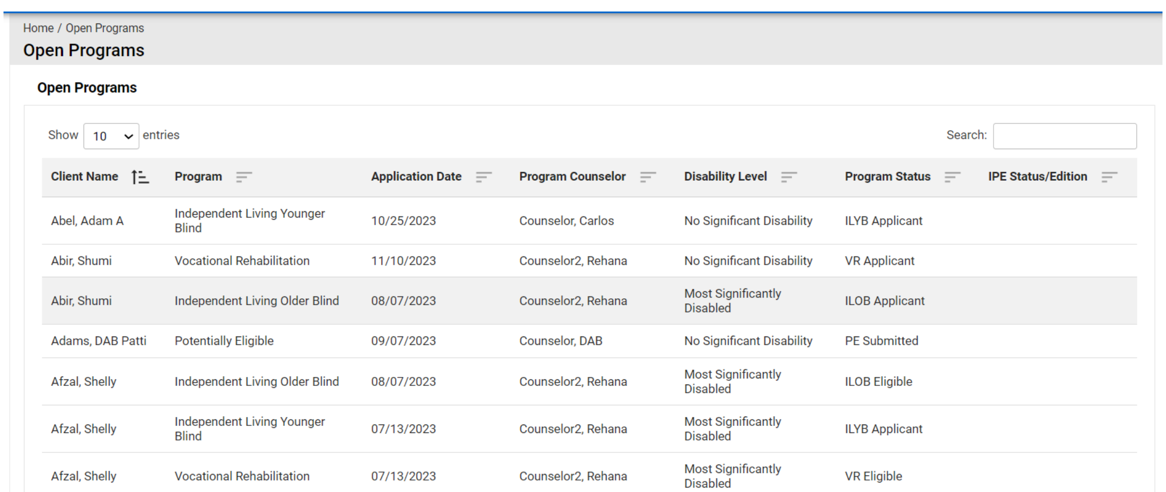


Figure 14-16 Menu > Open Programs Queue

3. The Open Programs queue will display.


Home / Open Programs

Open Programs

Open Programs

Show 10 entries Search:

Client Name	Program	Application Date	Program Counselor	Disability Level	Program Status	IPE Status/Edition
Abel, Adam A	Independent Living Younger Blind	10/25/2023	Counselor, Carlos	No Significant Disability	ILYB Applicant	
Abir, Shumi	Vocational Rehabilitation	11/10/2023	Counselor2, Rehana	No Significant Disability	VR Applicant	
Abir, Shumi	Independent Living Older Blind	08/07/2023	Counselor2, Rehana	Most Significantly Disabled	ILOB Applicant	
Adams, DAB Patti	Potentially Eligible	09/07/2023	Counselor, DAB	No Significant Disability	PE Submitted	
Afzal, Shelly	Independent Living Older Blind	08/07/2023	Counselor2, Rehana	Most Significantly Disabled	ILOB Eligible	
Afzal, Shelly	Independent Living Younger Blind	07/13/2023	Counselor2, Rehana	Most Significantly Disabled	ILYB Applicant	
Afzal, Shelly	Vocational Rehabilitation	07/13/2023	Counselor2, Rehana	Most Significantly Disabled	VR Eligible	

Figure 14-17 Open Programs Queue Listing

14.9 Payments Pending Review

This queue displays all payment records that are currently pending review/approval.

Features

- Ability to search for specific Payment records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as either Fiscal Staff, Supervisor Case Manager or Administrator
2. Navigate to **Queues** > **Payments Pending Review**

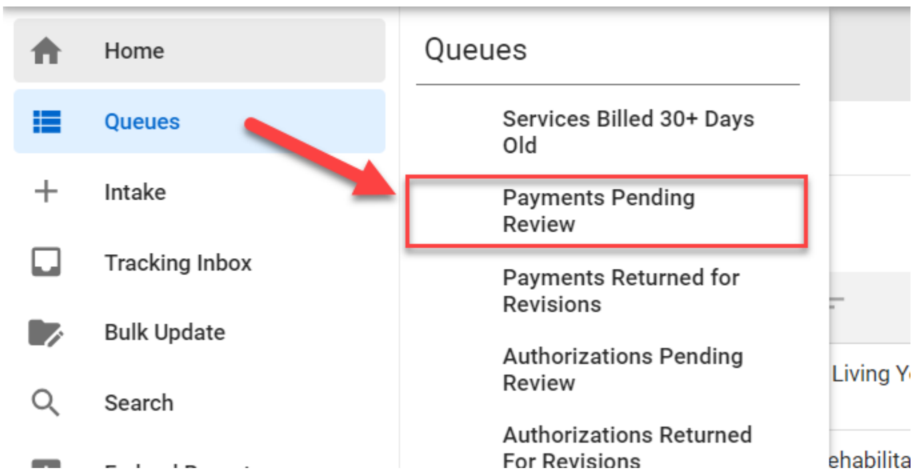


Figure 14-18 Menu > Payments Pending Review Queue

3. The Payment Pending Review queue will display

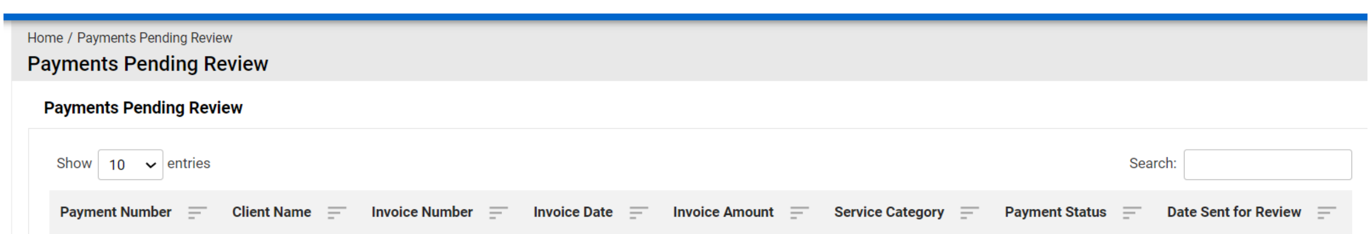


Figure 14-19 Payments Pending Review Queue Listing

14.10Payments Ready to Pay

This queue will display all records that have a payment that is ready to be paid.

Features:

- Ability to search for specific Payment records that are ready to be paid that are displayed on the page.

- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as Fiscal Staff.
2. Navigate to **Queues** > **Payments Ready to Pay**

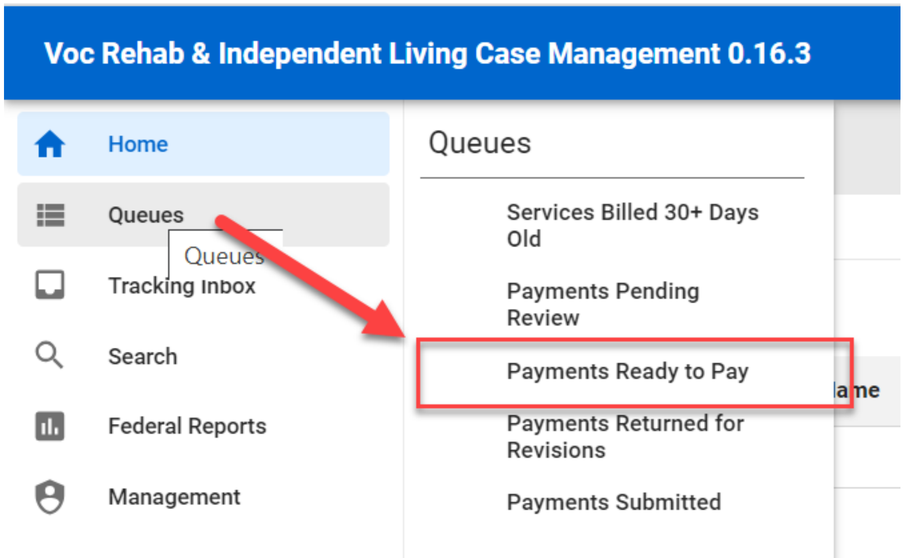
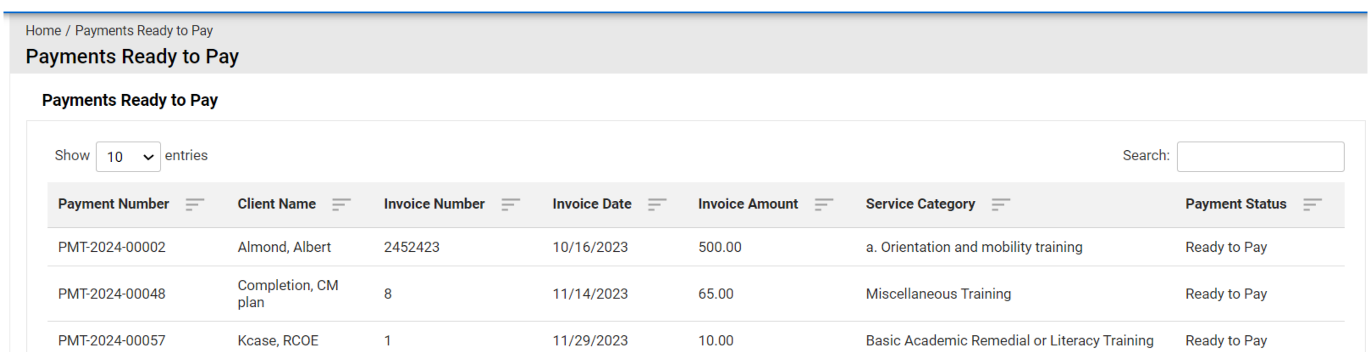


Figure 14-20 Menu > Payments Ready to Pay Queue

3. The Payments Ready to Pay queue will display.


Home / Payments Ready to Pay

Payments Ready to Pay

Payments Ready to Pay

Show 10 entries

Search:

Payment Number	Client Name	Invoice Number	Invoice Date	Invoice Amount	Service Category	Payment Status
PMT-2024-00002	Almond, Albert	2452423	10/16/2023	500.00	a. Orientation and mobility training	Ready to Pay
PMT-2024-00048	Completion, CM plan	8	11/14/2023	65.00	Miscellaneous Training	Ready to Pay
PMT-2024-00057	Kcase, RCOE	1	11/29/2023	10.00	Basic Academic Remedial or Literacy Training	Ready to Pay

Figure 14-21 Payments Ready to Pay

14.11Payments Returned for Revisions

This queue displays all payment records that have been returned for revisions.

Features

- Ability to search for specific Payment records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as a user with a role of Case Manager.
2. Navigate to Queues > Payments Returned for Revisions.

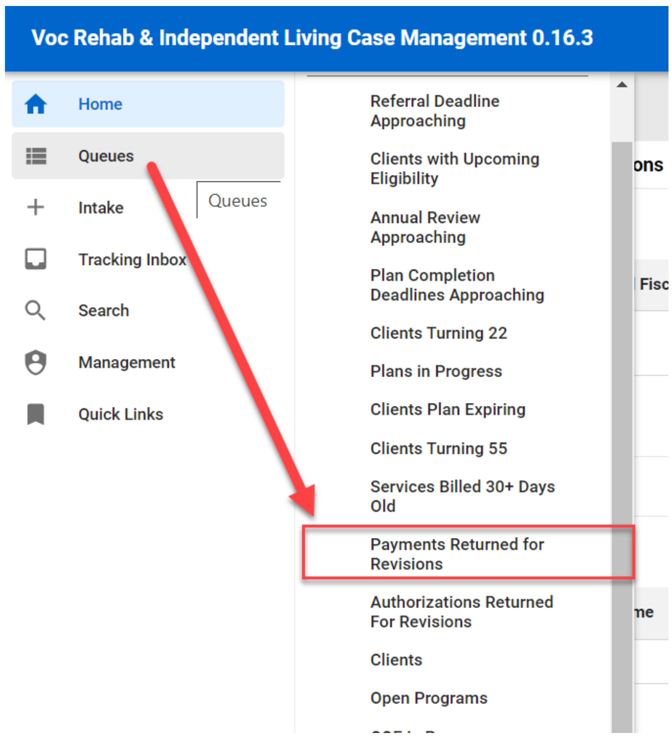


Figure 14-22 Menu > Payments Returned for Revisions

3. The Payments Returned for Revisions queue will display.

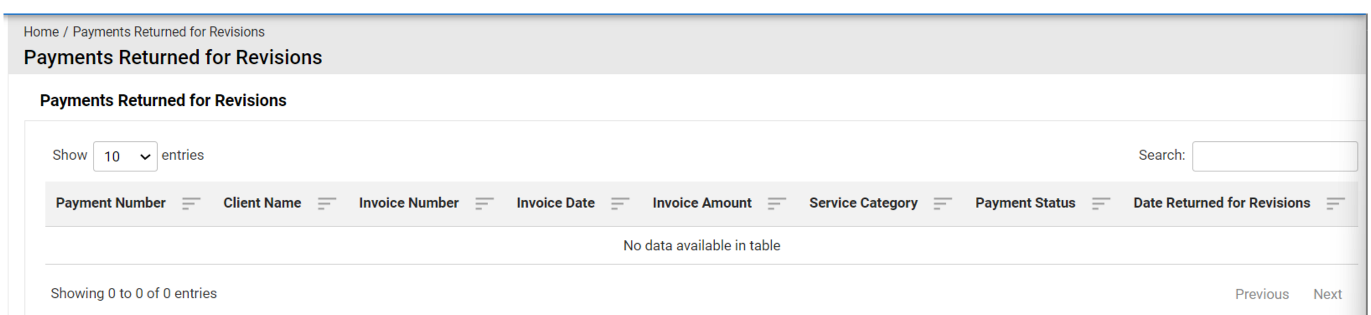


Figure 14-23 Payments Returned for Revisions Queue Listing

14.12Payments Submitted

This queue displays all payment records that have been approved for payment and have been submitted for payment.

Features

- Ability to search for specific Payment records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as a user with a role of Fiscal Clerk.
2. Navigate to **Queues** > **Payments Submitted**.

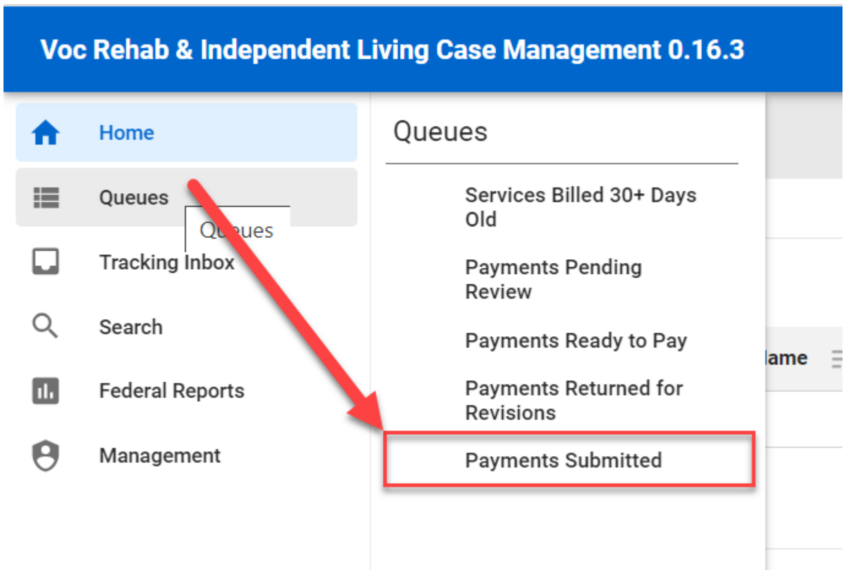


Figure 14-24 Menu > Payments Submitted Queue

3. The Payments Submitted queue will display.

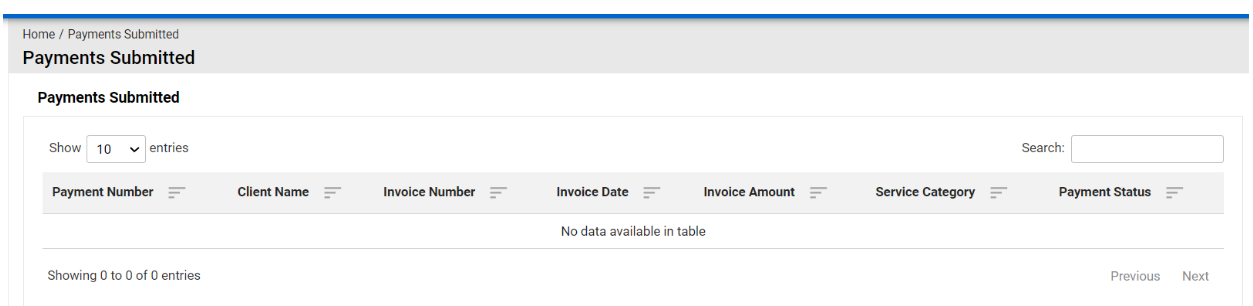


Figure 14-25 Payments Submitted Queue Listing

14.13 Services Billed 30+ Days Old

This queue displays all Vocational Rehabilitation payment records where the Payment Status = Draft and Last Event = Services Billed and it has been in this status for 30 days or more.

Features:

- Ability to search for specific Payment records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as a Fiscal Clerk.
2. Navigate to **Queues** > **Services Billed 30+ Days Old**.

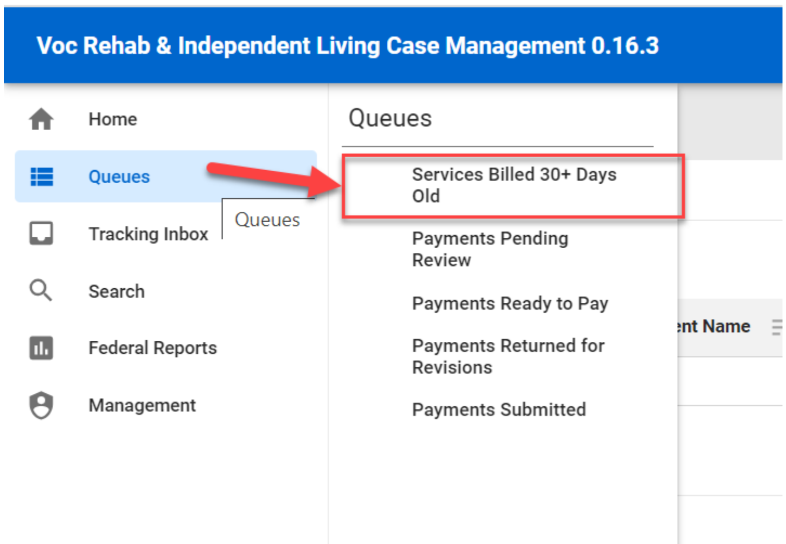


Figure 14-26 Menu > Services Billed 30+ Days Old Queue

3. The Services Billed 30+ Days Old queue will display.

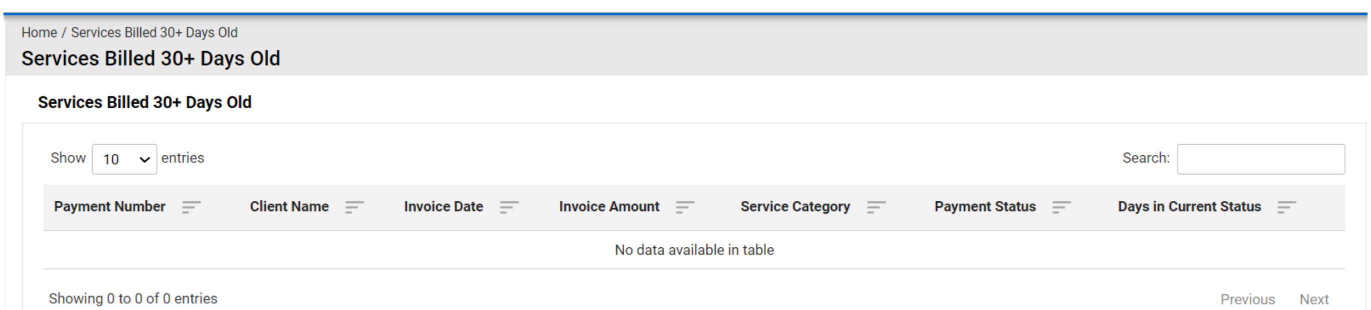


Figure 14-27 Services Billed 30+ Days Old Queue Listing

14.14Referral Deadline Approaching

This queue will display all Referrals (Client = No) who's completion deadline is approaching.

Features:

- Ability to search for specific Referral records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system provided account that has the Case Manager role.

2. On the left menu, hover over the Queues option on the main menu. The Client Referral Deadline Approaching queue is available.

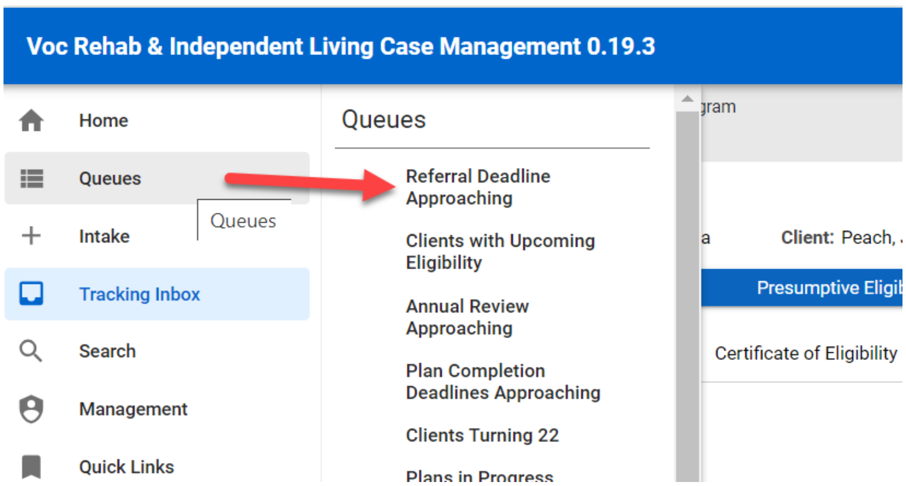


Figure 14-28 Menu > Referral Deadline Approaching Queue

3. Click on the queue listing **Referral Deadline Approaching**. All Referrals with a referral deadline approaching will be reflected in this queue.

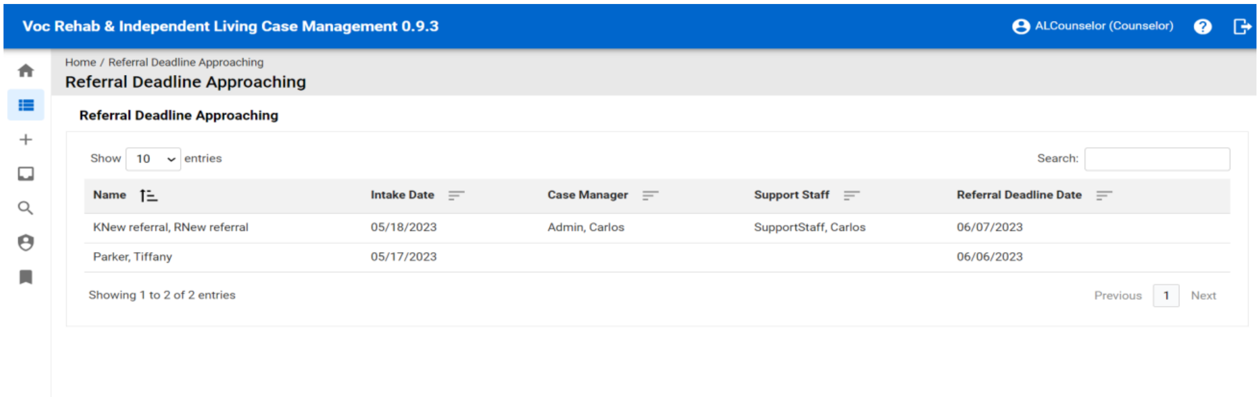


Figure 14-29 Referral Deadline Approaching Queue Listing

Note: When a Referral is converted to a Client the status will change in the system and they will no longer be visible in this queue.

14.15 Clients with Upcoming Eligibility

This queue will display all client records who have an upcoming eligibility.

Features

- Ability to search for specific client records that are displayed on the page who have upcoming eligibility.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system provided account that has the Case Manager or Supervisor role. Only those assigned as a Case Manager or Supervisor will have this ability.

2. On the left menu, hover over the Queues option on the main menu. The Clients Upcoming Eligibility queue is available.

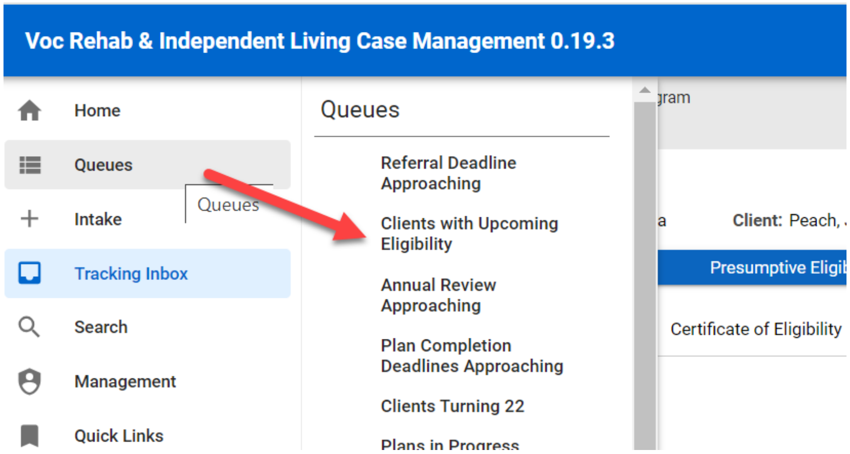


Figure 14-30 Menu > Clients with Upcoming Eligibility

3. Click on the queue. The following columns will display in the queue: Client Name, Application Date, Case Manager, Support staff, and COE Due Date.

Case Manager view:

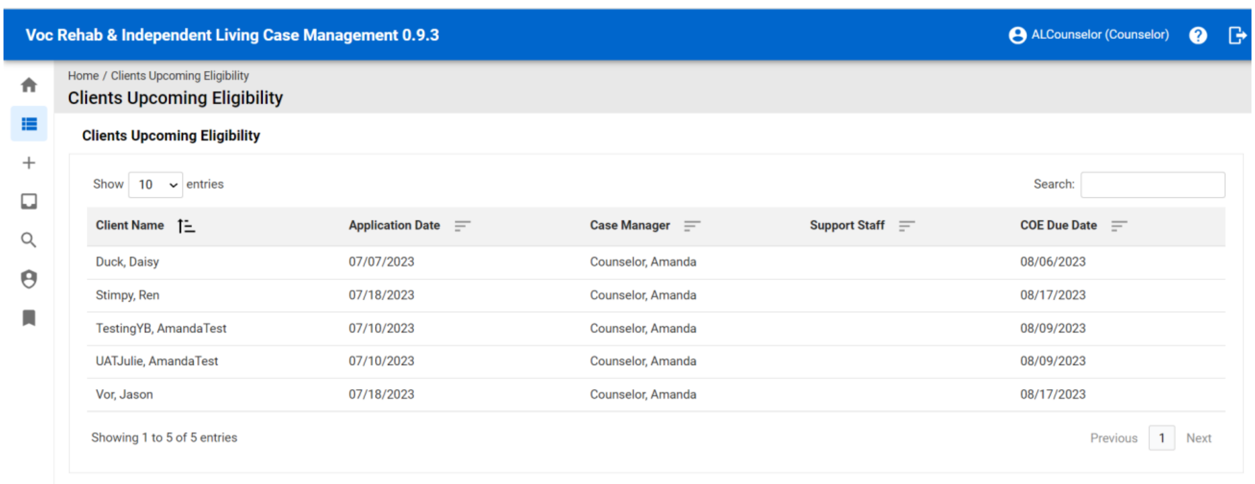


Figure 14-31 Case Manager View: Clients Upcoming Eligibility Queue Listing

Supervisor view:

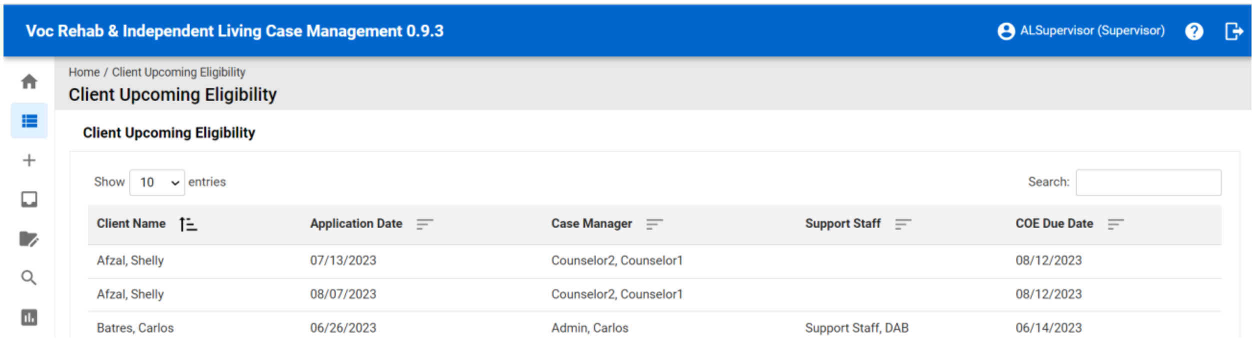


Figure 14-32 Supervisor View: Clients Upcoming Eligibility Queue Listing

14.16Plan Completion Deadlines Approaching

This queue will display all client records who have a plan completion deadline approaching.

Features

- Ability to search for specific client records that are displayed on the page who have a plan completion deadline approaching.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system provided account Case Manager or Supervisor role.
2. Navigate to the menu on the left side of the screen and hover over the Queues link.
3. The Queue menu will expand and the queues available to the Case Manager role will display.
4. Navigate down to the ‘Plan Completion Deadlines Approaching’ queue

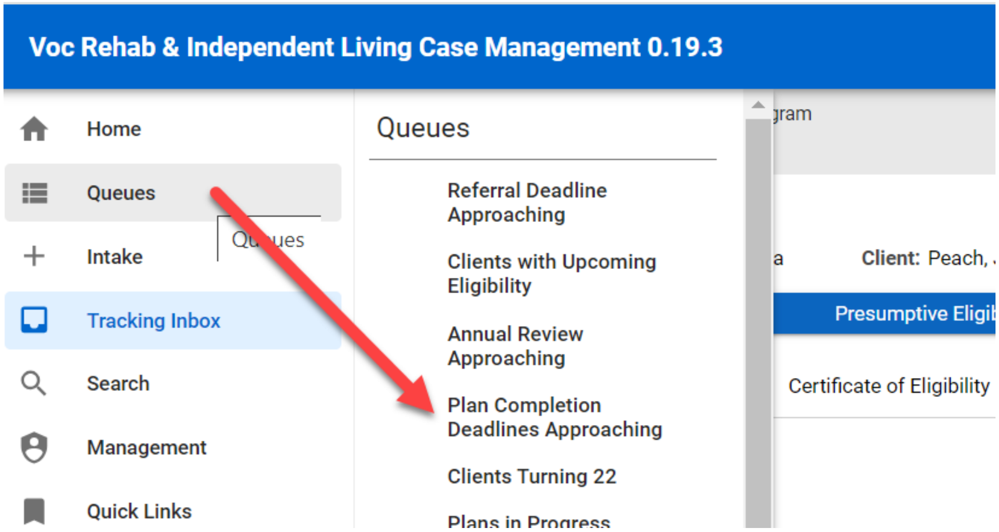


Figure 14-33 Menu > Plan Completion Deadlines Approaching Queue

5. Click on **Plan Completion Deadlines Approaching** and the queue will display.

6. The following columns are shown in the queue: Client Name, Eligibility Date, Support Staff and Plan Due Date.

Case Manager View:

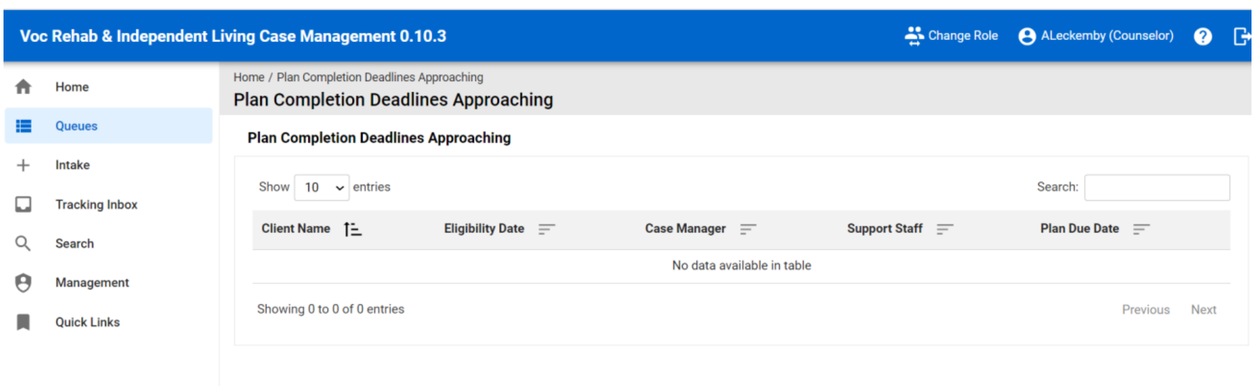


Figure 14-34 Case Manager View: Plan Completion Deadlines Approaching Queue Listing

Supervisor View:

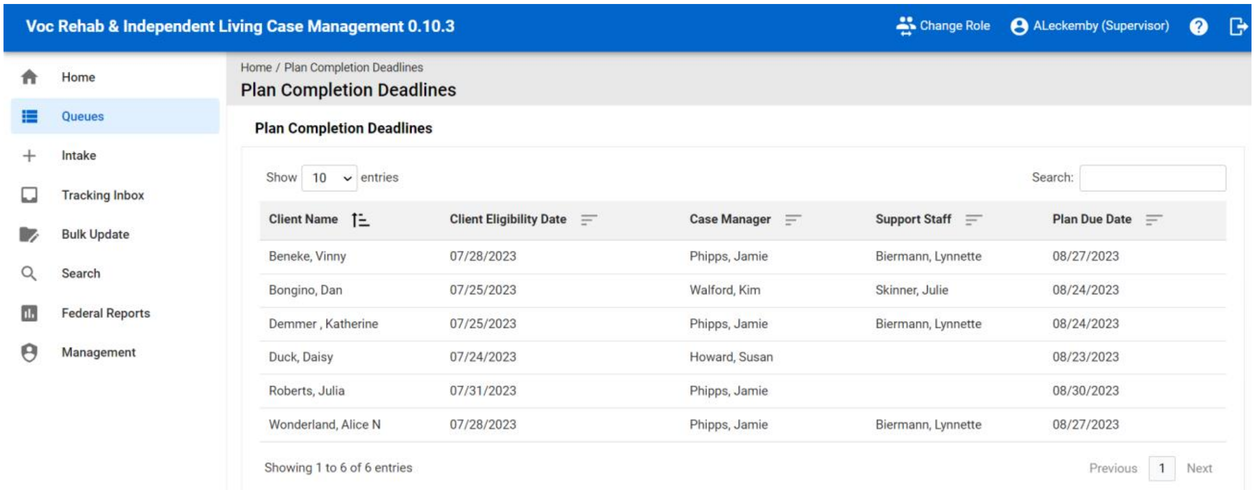


Figure 14-35 Supervisor View: Plan Completion Deadlines Approaching Queue Listing

14.17 Plans in Progress

This queue will display any plans that are in progress.

Features

- Ability to search for specific client records that are displayed on the page who have a plans in progress
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as a Support Staff, Case Manager or Supervisor.
2. Navigate to **Queues** > **Plans in Progress**

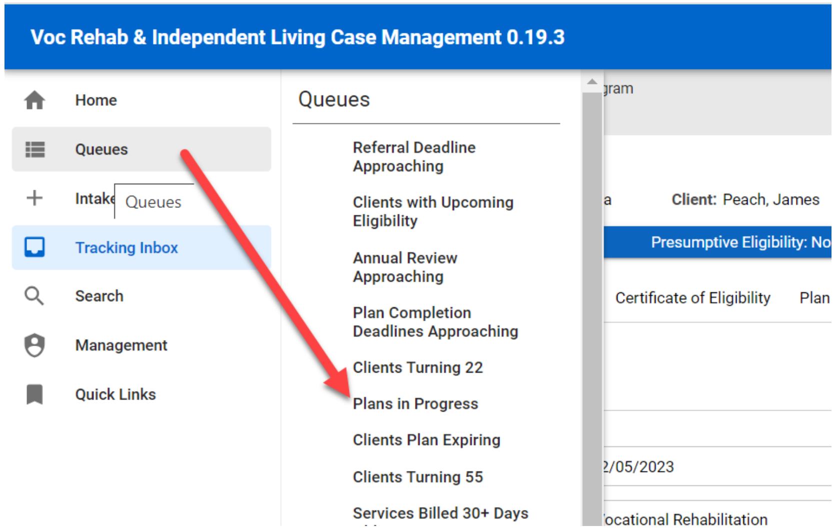


Figure 14-36 Menu > Plans in Progress Queue

3. The queue will display:

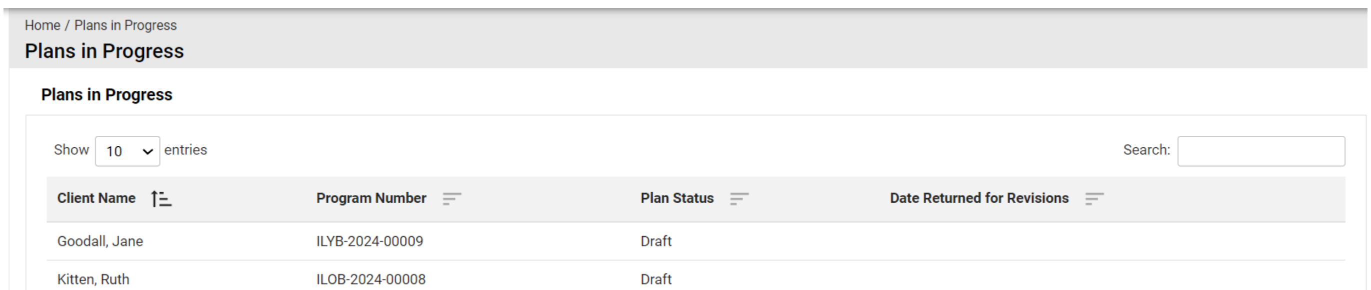


Figure 14-37 Plans in Progress Queue Listing will Display

4. Clicking any record in the listing will take the user to the plan form.

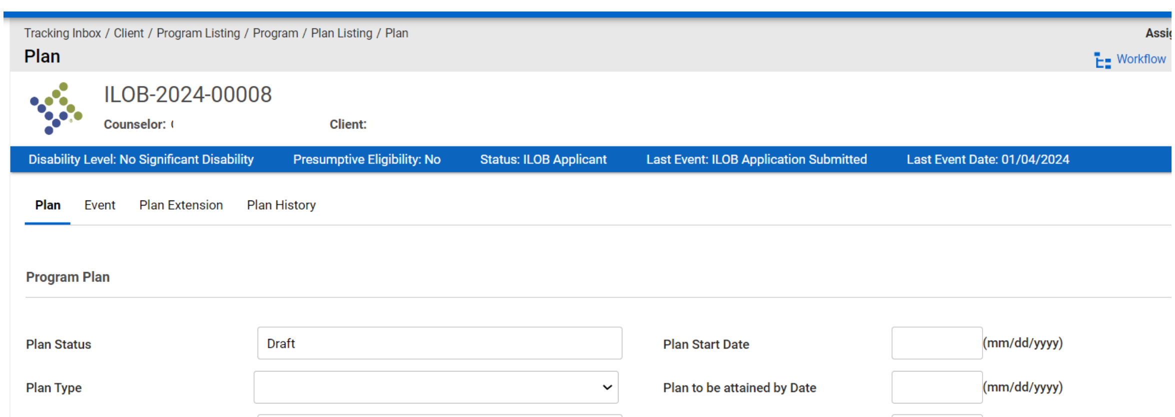


Figure 14-38 Plan Form

14.18Plans Pending Review

This queue will display any plans that are in progress and pending review by specific staff.

Features

- Ability to search for specific client records that are displayed on the page who have a plans in progress/are pending review.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system as Support Staff
2. Navigate to **Queues** > **Plans Pending Review**

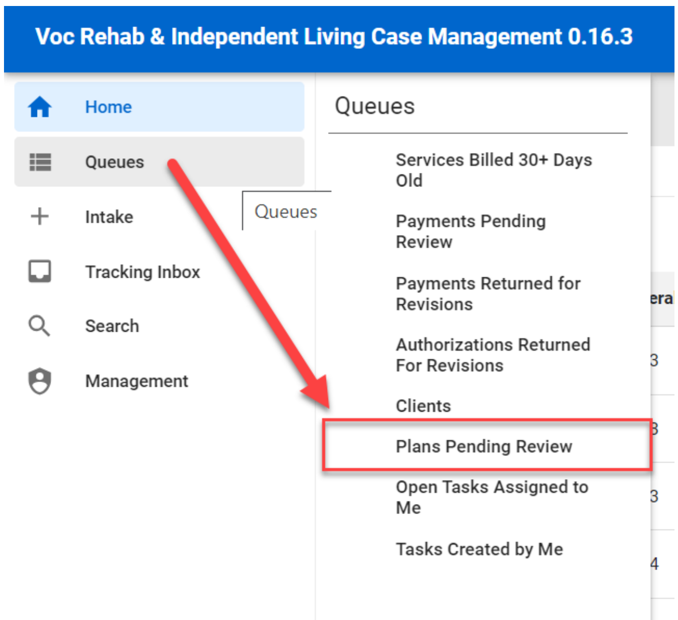


Figure 14-39 Menu > Plans Pending Review Queue

5. Click on ‘Plans Pending Review’ and the queue will display.

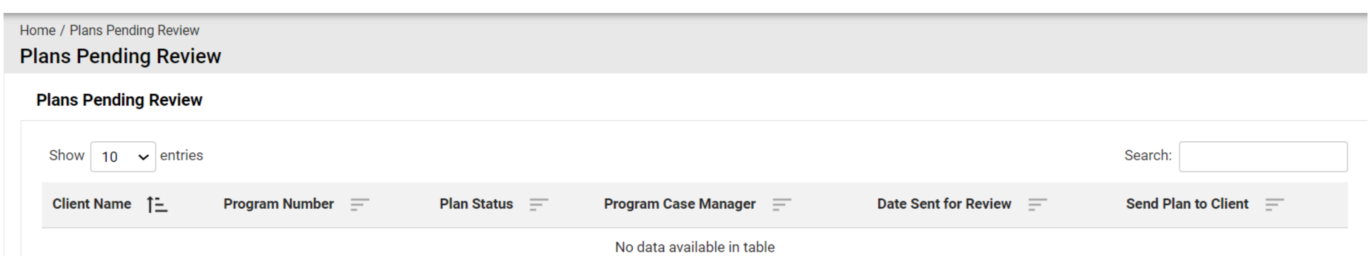


Figure 14-40 Plans Pending Review Queue Listing

14.19Plans Pending Approval

This queue will display all client records who have a plan that is pending approval by the Supervisor.

Features

- Ability to search for specific client records that are displayed on the page who have a plan that is pending approval
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as a Supervisor
2. Navigate **Queues** > **Plans Pending Approval**

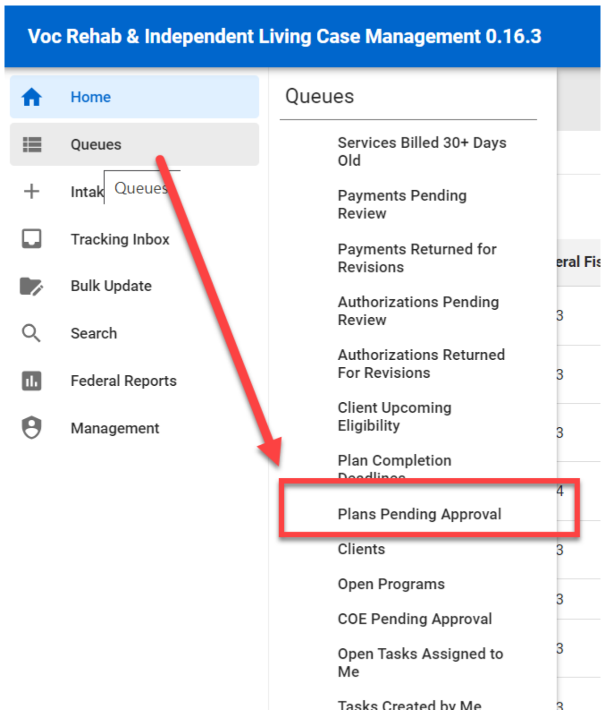


Figure 14-41 Menu > Plans Pending Approval Queue

3. Click on the queue title 'Plans Pending Approval' and the queue display.

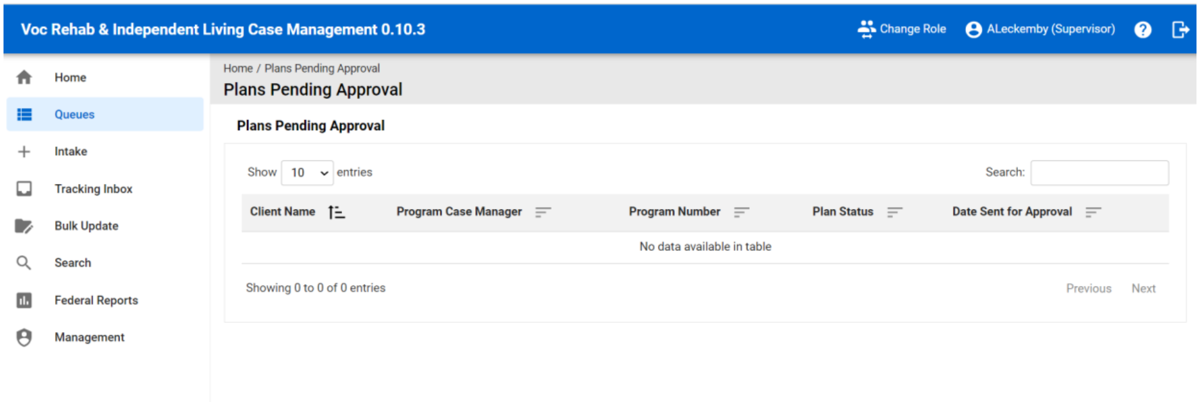


Figure 14-42 Plans Pending Approval Queue Listing

14.20Clients Plan Expiring

This queue will display all clients who have a plan that is approaching its expiration date.

Features

- Ability to search for specific client records that are displayed on the page who have a plan that has an expiration approaching.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Login with your system provided account (Case Manager role).
2. Navigate to **Queues** > **Clients Plan Expiring**

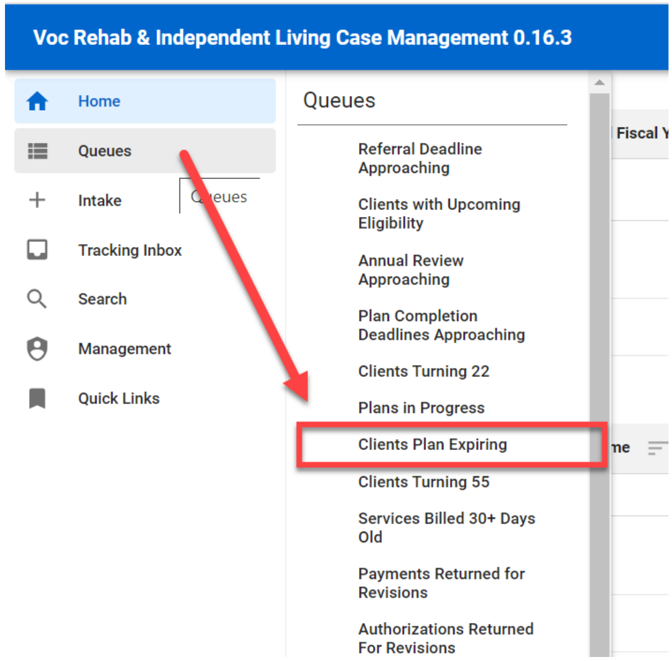
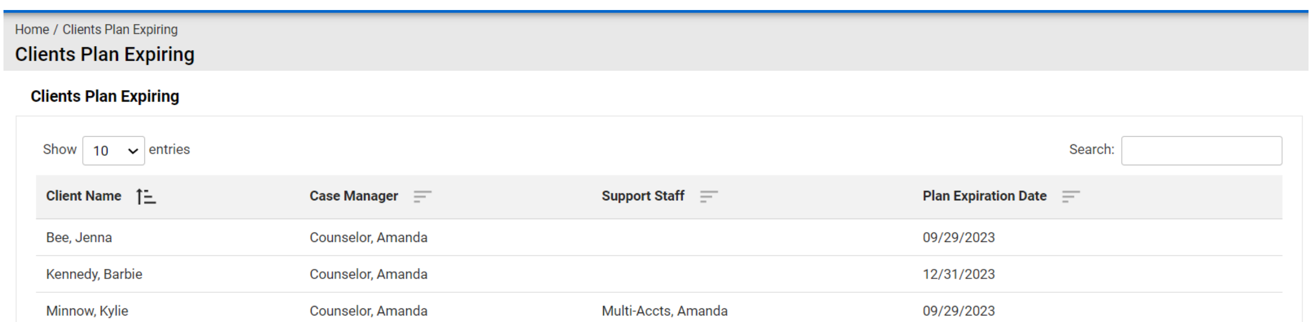


Figure 14-43 Menu > Clients Plan Expiring Queue

5. Click on ‘Clients Plan Expiring’ and the queue will display.



Client Name	Case Manager	Support Staff	Plan Expiration Date
Bee, Jenna	Counselor, Amanda		09/29/2023
Kennedy, Barbie	Counselor, Amanda		12/31/2023
Minnow, Kylie	Counselor, Amanda	Multi-Accts, Amanda	09/29/2023

Figure 14-44 Clients Plan Expiring Queue Listing

14.21Clients Turning 22

This queue will display all clients who will be turning 22 in 6 months.

Features

- Ability to search for specific client records that are displayed on the page who have a 22nd birthday in 6 months.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in as a Case Manager or a Supervisor.
2. Navigate to **Queues** > **Client's Turning 22**

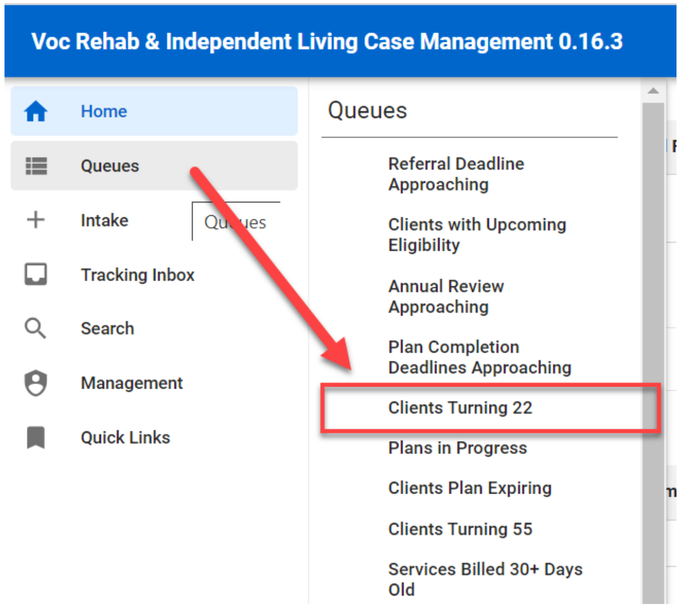


Figure 14-45 Menu > Clients Turning 22 Queue

3.Click the Clients Turning 22. Queue will display.

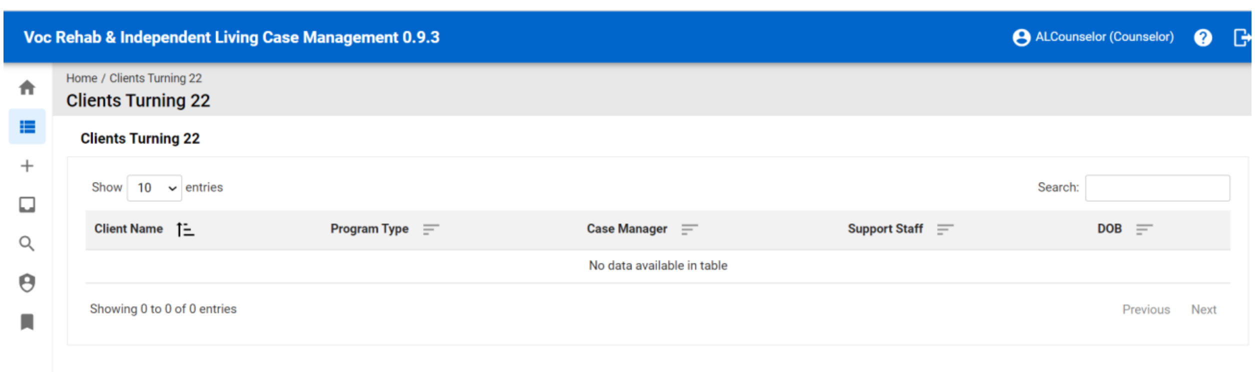


Figure 14-46 Clients Turning 22 Queue Listing

14.22Clients Turning 55

This queue will display all clients who will be turning 55 in 6 months.

Features

- Ability to search for specific client records that are displayed on the page who have a 55th birthday in 6 months.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.

- Ability to sort by any column in the data table.

1. Log in as a Case Manager or Supervisor.
2. Navigate to **Queues** > **Client Turning 55**

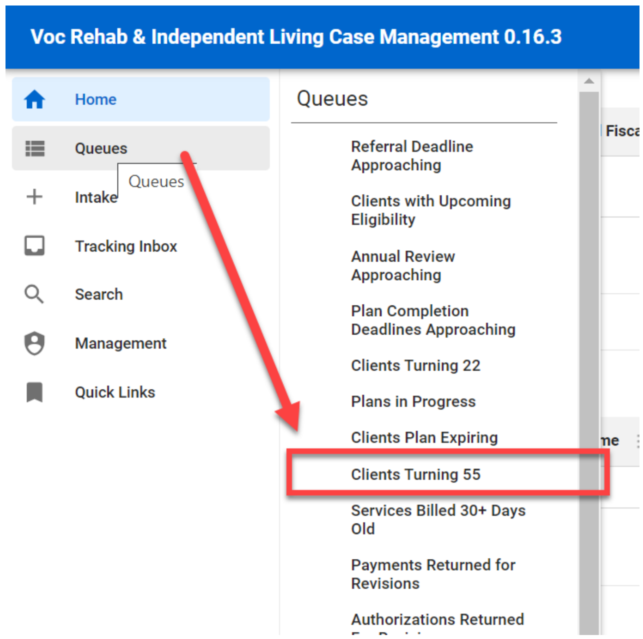


Figure 14-47 Menu > Clients Turning 55 Queue

3. Click on 'Clients Turning 55' and the queue will display.

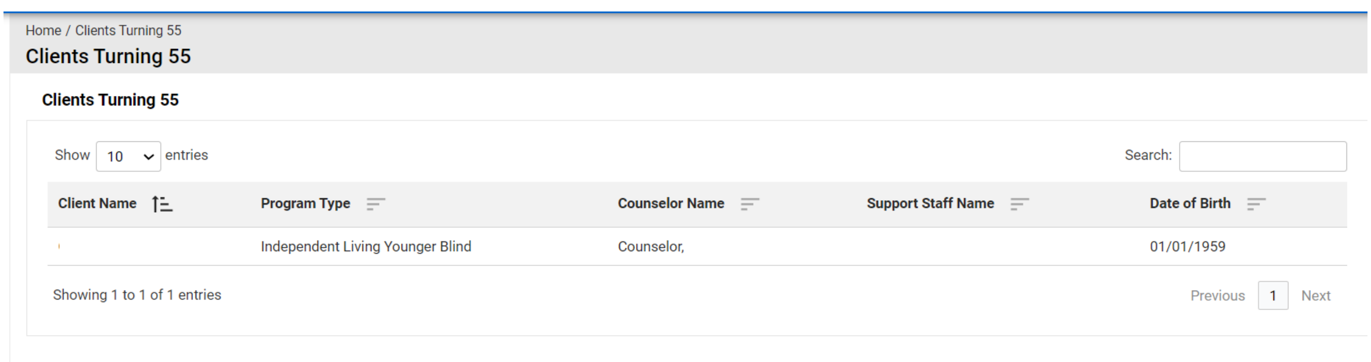


Figure 14-48 Clients Turning 55 Queue Listing

14.23Open Tasks Assigned to Me

This queue will display all tasks that are assigned to the user via the Work Request function.

Features

- Ability to search for specific tasks that are assigned to the user
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log in to the system.
2. Navigate to **Queues** > **Open Tasks Assigned to Me**

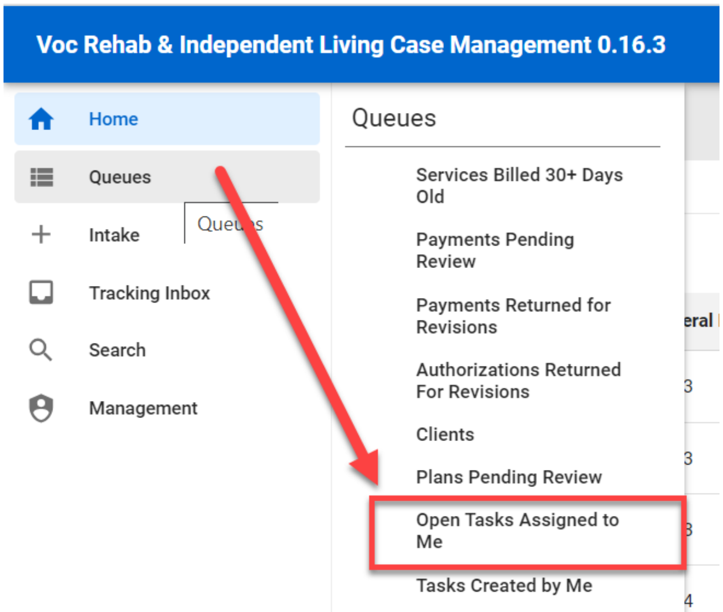
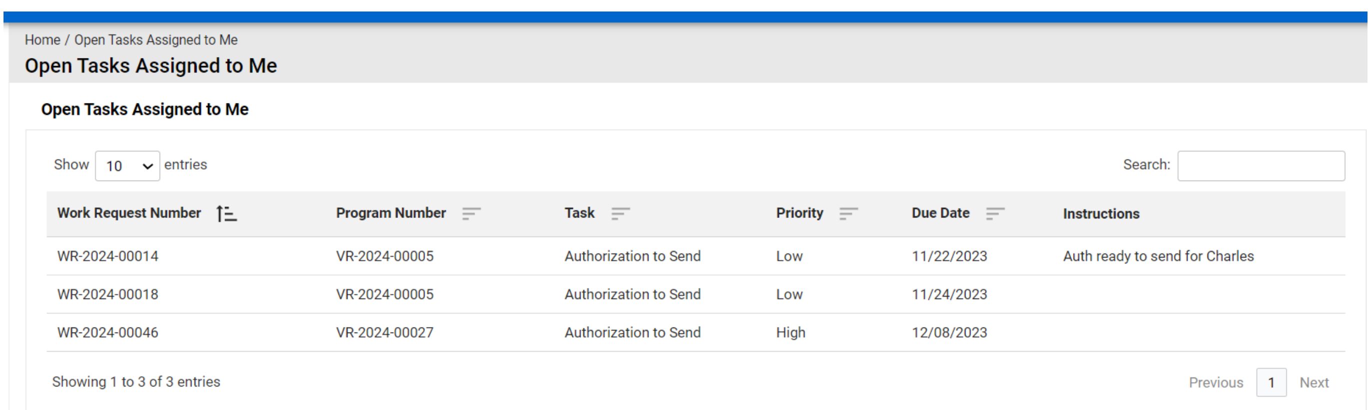


Figure 14-49 Menu > Open Tasks Assigned to Me Queue

3. The Open Tasks Assigned to Me queue will display



Work Request Number	Program Number	Task	Priority	Due Date	Instructions
WR-2024-00014	VR-2024-00005	Authorization to Send	Low	11/22/2023	Auth ready to send for Charles
WR-2024-00018	VR-2024-00005	Authorization to Send	Low	11/24/2023	
WR-2024-00046	VR-2024-00027	Authorization to Send	High	12/08/2023	

Figure 14-50 Open Tasks Assigned to Me Queue Listing

14.24Tasks Created by Me

This queue will display all tasks that are created by the user via the Work Request function.

Features

- Ability to search for specific tasks that are created by the user
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

1. Log into the system
2. Navigate to **Queues** > **Tasks Created by Me**

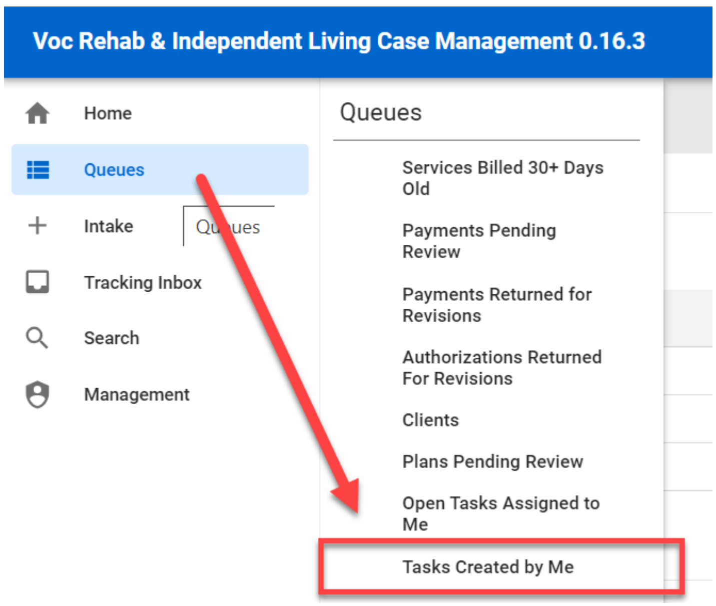


Figure 14-51 Menu > Tasks Created by Me Queue

3. The Tasks Created by Me queue will display

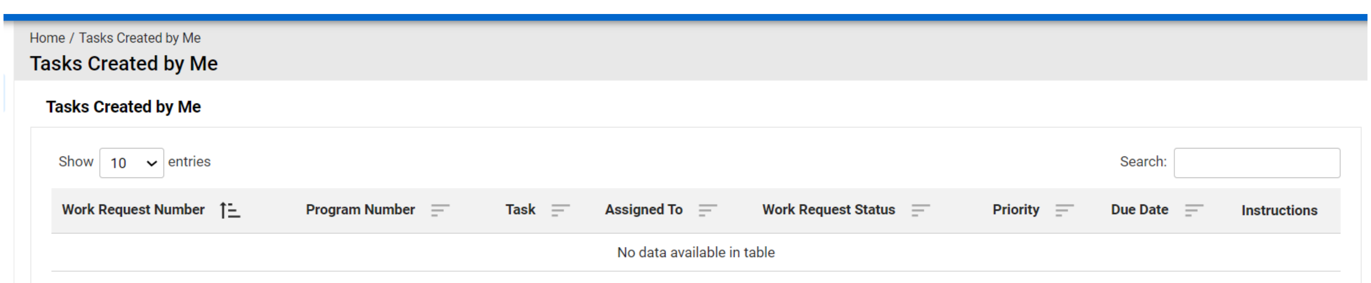


Figure 14-52 Tasks Created by Me Queue Listing

15 Bulk Update

15.1 Bulk Update Release from OOS

This queue displays all open Vocational Rehabilitation authorization records that are open and 90 plus days old with no open payments.

The Bulk Update Release from OOS does not apply to Independent Living program types as OOS is not an applicable status.

Features:

- Ability to search for specific Authorization records that are displayed on the page.
- The data table paginates and shows 10 records by default but gives the user the ability to change it with options of 25, 50, 100.
- Ability to sort by any column in the data table.

Business Rules:

- This queue is available to all roles, but users will only see records they have access to based on the hierarchy.
- When logged in with any role, the user will see Clients that meet the criteria noted above.
- Records will display in the queue based on the following criteria:
  - Client records with a Disability Priority = 1 will display first in the queue. Once all Priority 1 records have been removed from the queue then Disability Priority 2 records will display. After all Priority 2 records have been cleared from the queue then Disability Priority 3 records will display.
- The following columns are displayed in the Queue:
  - Client Name
  - Date of Application
  - Disability Priority
  - Disability Level

1. Log in with any role.

2. Navigate to the left menu and hover over **Bulk Update** then click on **Bulk Update - Release from OOS.**

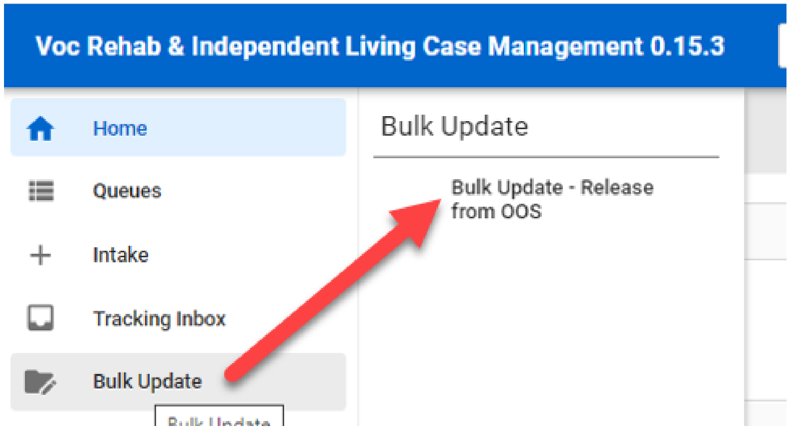


Figure 15-1 Menu > Bulk Update - Release from OOS

3. The first column within the queue allows a user to select/deselect the record for update. Click within the field to add/remove the check-mark.

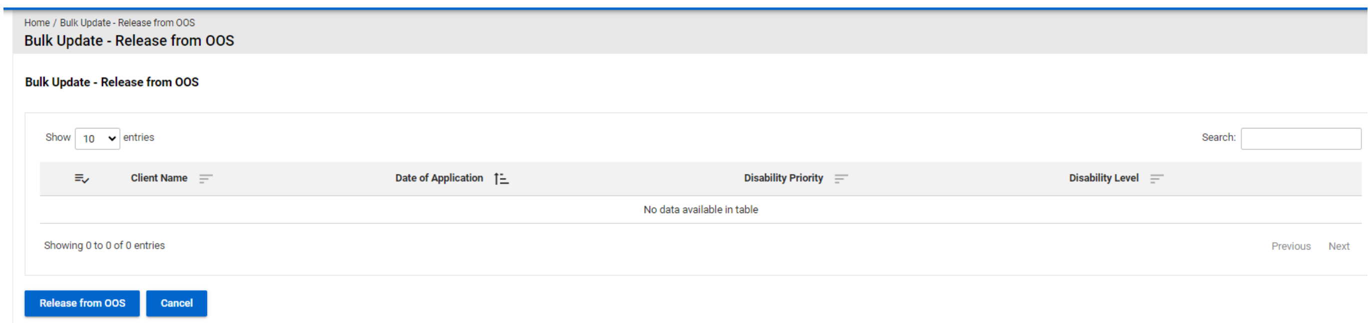


Figure 15-2 Bulk Update - Release from OOS 'Queue'

4. Once one or more of the records on the queue are selected and you are ready to release them, click the 'Release from OOS' button to have the system take the selected action. Selected records will be updated to have a status of 'Eligible'.

16 Reports

16.1 Reports

The system provides extensive reporting capabilities using a standard set of reports as well as reports designed for Iowa Department for the Blind specifically. Reports can be accessed from your dashboard or by navigating to the Reporting tab. The Reporting screen contains the My Reports and Shared Reports tabs.

Not all reports can be accessed by every role; the report permissions are role specific.

Reports that exist within the system are:

- RSA911
- RSA17
- PE Pre-ETS Report
- PE Vocational Rehabilitation Report

Note: The Vocational Rehabilitation Report and the Pre-ETS Report were originally one report that was broken into two pieces due to system limitations.

Additional 'duplicate' reports added to allow for ease of use with JAWS:

- 508 PE Pre-ETS Report

- 508 PE Vocational Rehabilitation

- ACL704
- The RSA7OB Report
- Legislative Factbook
- Board Report
- WIOA ETA-1969 Report (Interface File)
- SWIS Import (Interface File)
- SWIS Export (Interface File)

16.1.1 Running Reports from Shared Reports

1. From the left menu hover over **Reporting**, when the menu expands select **Shared Reports**.

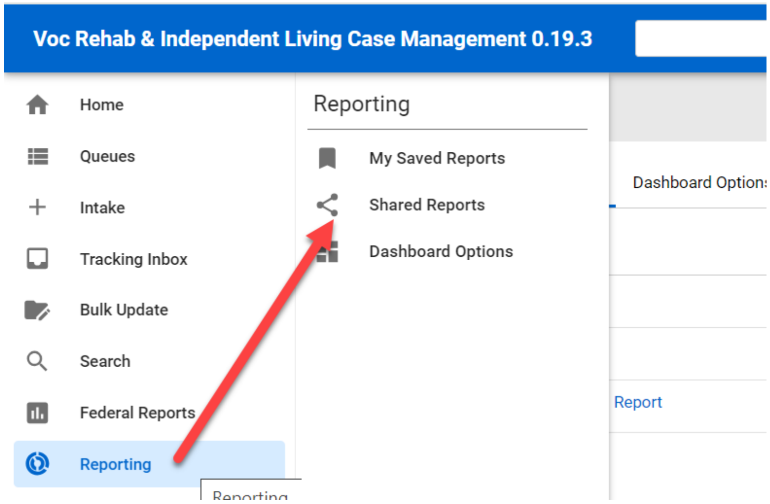


Figure 16-1 Menu > Reporting> Shared Reports

2. The Shared Reports will display:

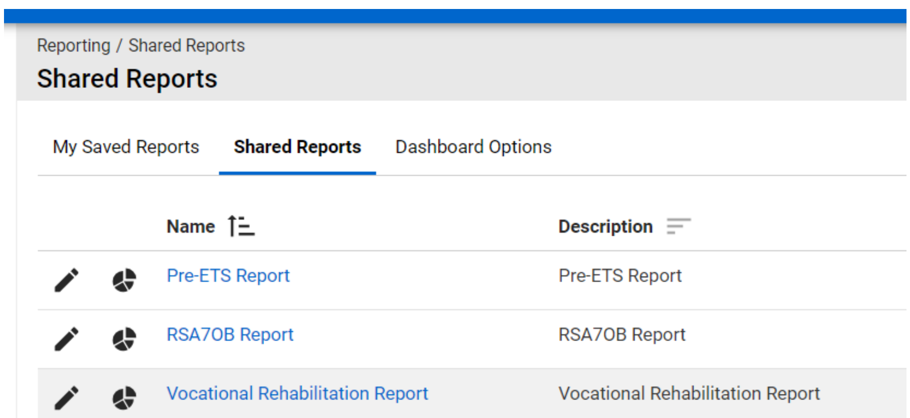


Figure 16-2 Shared Reports Display

3. Select the report to be run (for this Example the RSA7OB report will be run). Select the 'pie chart' icon (if hovered over it reads "Run RSA7OB Report". Choose the **report parameters** if they exist for the selected report.

4. Select the **appropriate display options** for viewing the report.

Note: Display options vary based on the export options set by your Administrator. If viewing a report in a format other than single-page HTML in your browser, you will need to have access to the program used to view the report, such as Adobe Reader, Microsoft Word, or Microsoft Excel.

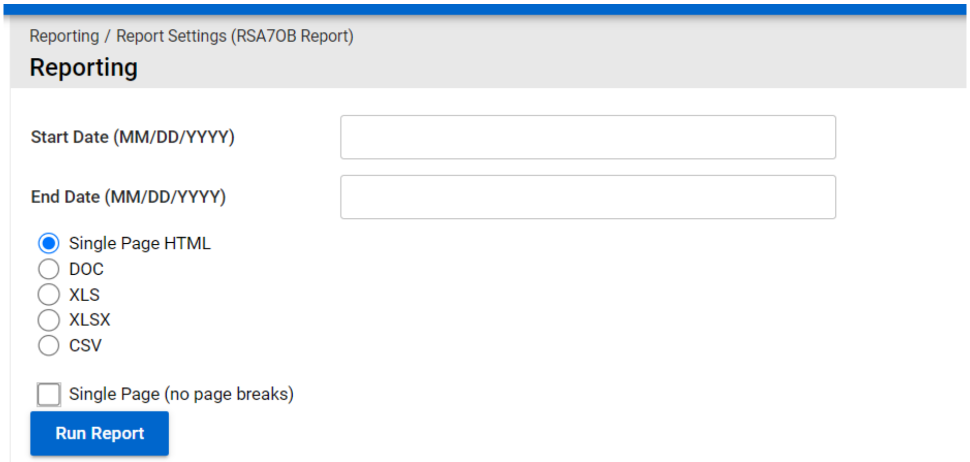
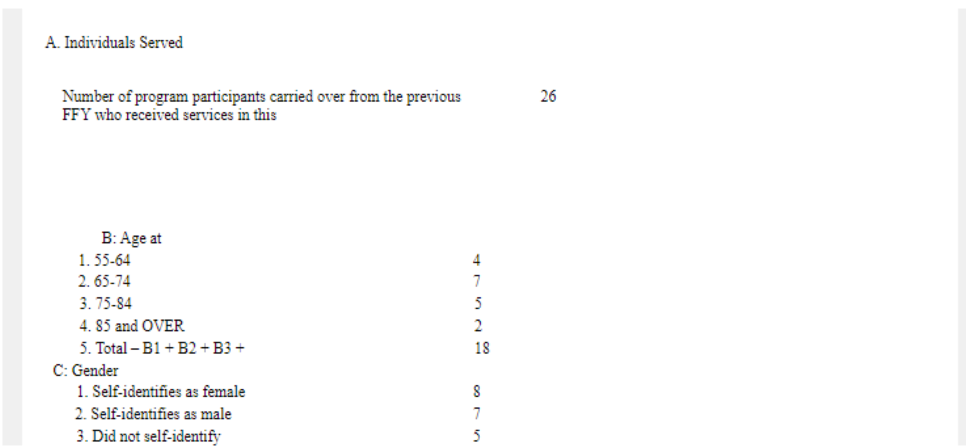


Figure 16-3 Reporting > Report Settings

5. Click **Run Report**.

Note: When the report is received from the server, it is displayed in a separate browser window. When finished reviewing the report, close the separate report window.

6. The report will display:



A. Individuals Served

Number of program participants carried over from the previous FFY who received services in this	26

B: Age at	
1. 55-64	4
2. 65-74	7
3. 75-84	5
4. 85 and OVER	2
5. Total – B1 + B2 + B3 +	18
C: Gender	
1. Self-identifies as female	8
2. Self-identifies as male	7
3. Did not self-identify	5

Figure 16-4 Sample RSA7OB Report Generated

16.1.2 Running Reports/Interface Reports from Shared Pages

1. From the left menu hover over Configuration. When the menu expands under the 'Pages' header select **Shared Pages**.

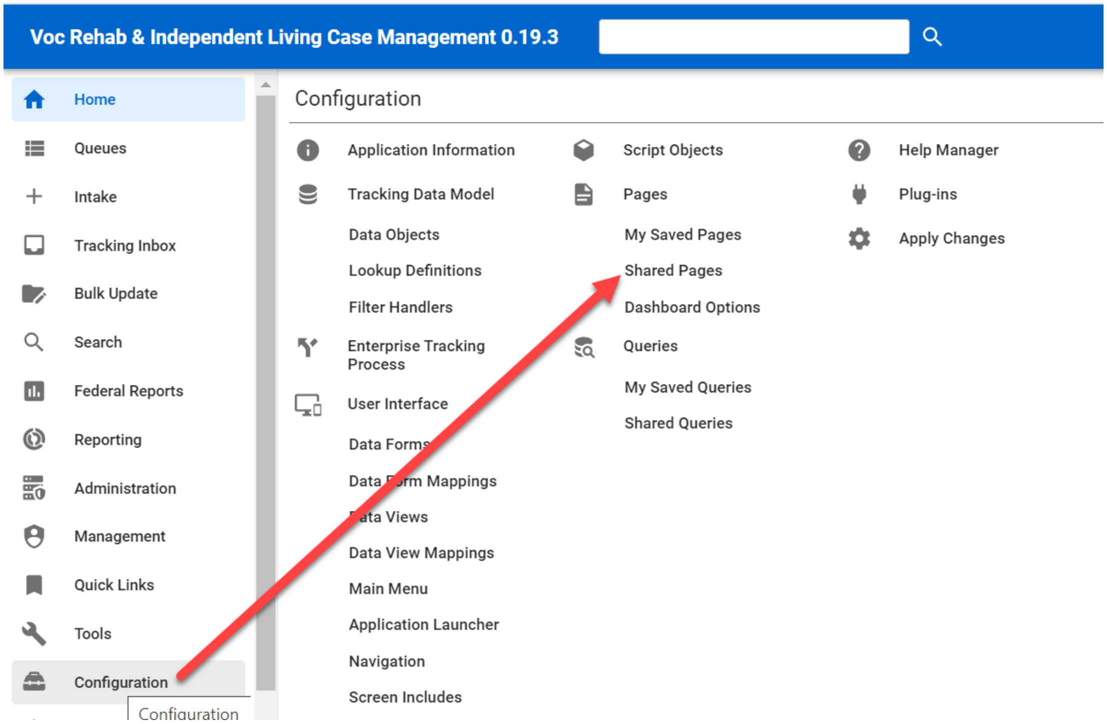


Figure 16-5 Menu > Configuration> Shared Pages

2. The Shared Pages Listing will display:

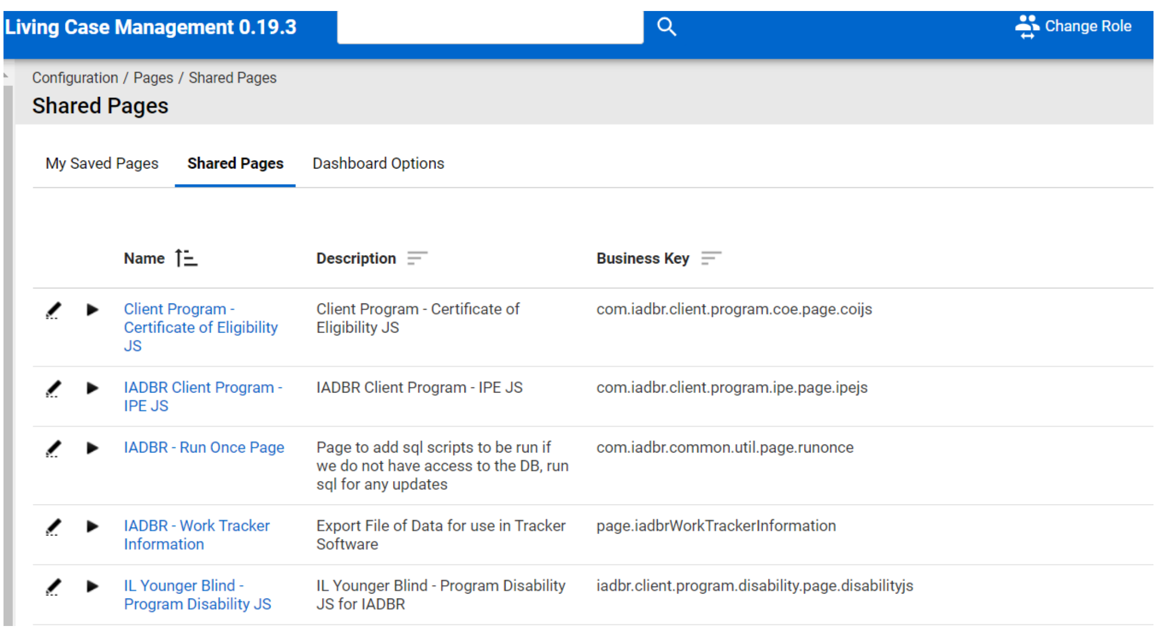


Figure 16-6 Shared Pages Listing Display

3. Select the report/interface file:

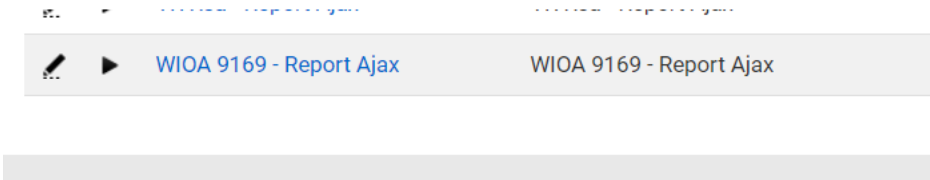


Figure 16-7 Report/Interface File: WIOA

16.2 Setting Report Dashboard Options

Under Reporting > Dashboard Options, you can select reports from the My Saved Reports or Shared Reports section to be listed as hyperlinks or with displayed results on the Home screen.

To configure report dashboard options, complete the following steps:

1. Navigate to **Reporting** > **Dashboard Options**.

2. Click the **check boxes** next to **List** and/or **Display** to select which reports to list or display on the home screen.

Note: Consider the size of reports before electing to list or display; you may not wish to display very large reports on your home screen.

3. Click **Save**.

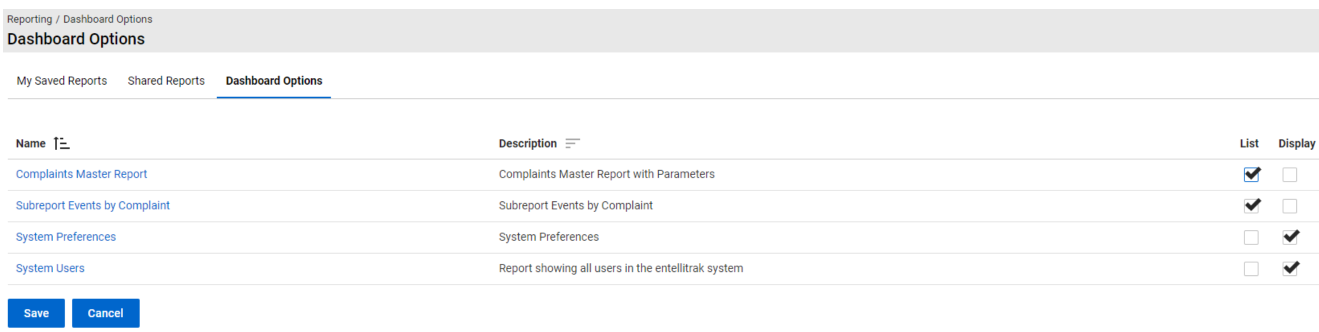


Figure 16-8 Reporting > Dashboard Options

16.3 Federal Reports

16.3.1 RSA911

Not all roles have access to run the RSA911 Report. It is limited to Product Administrator, Supervisors and Fiscal Clerk roles.

1. To run the RSA911 report navigate to the left menu and click on **Federal Reports**.

2. When the menu expands click on **RSA 911**.

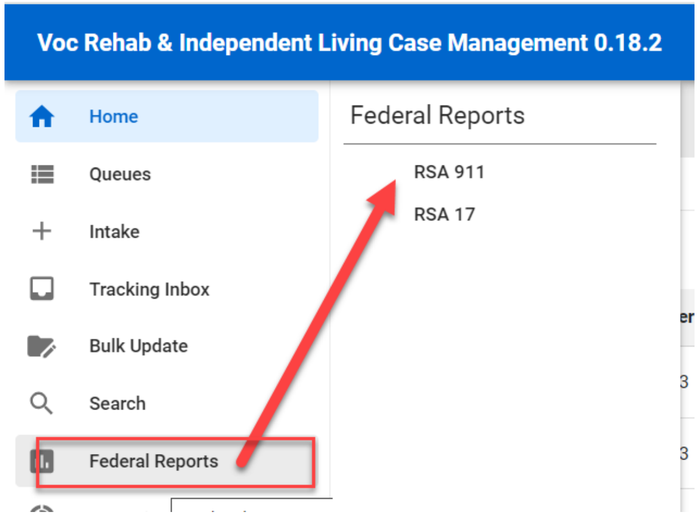


Figure 16-9 Federal Reports > RSA911

3. The RSA911 form will display.

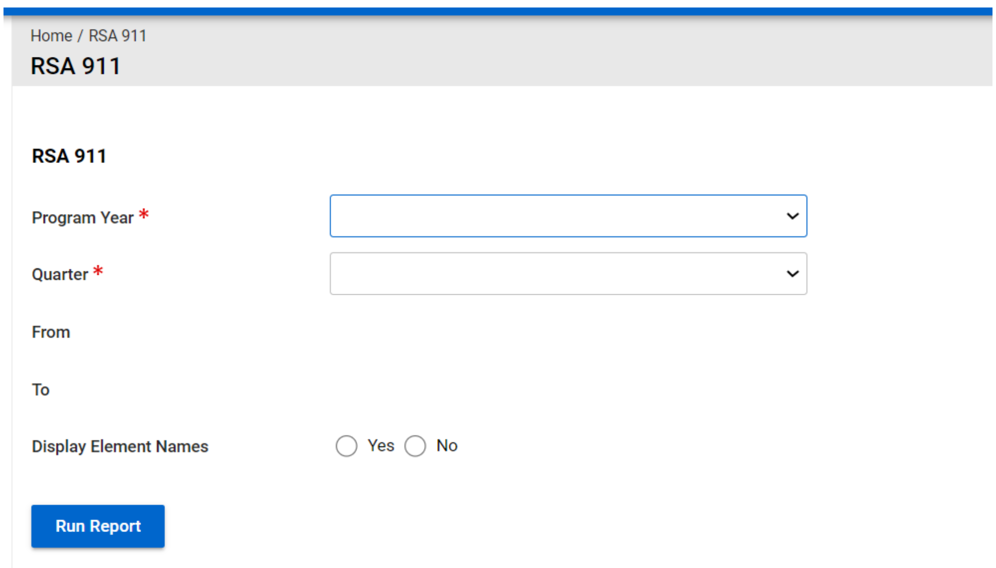


Figure 16-10 RSA911 Form Display

4. Fill in the report parameters for the needed information. The 'From' and 'To' dates will populate automatically and are read only based on which Program Year and Quarter are selected.

5. Click **Run Report.**

6. The report will generate and can be opened and saved to the users computer.

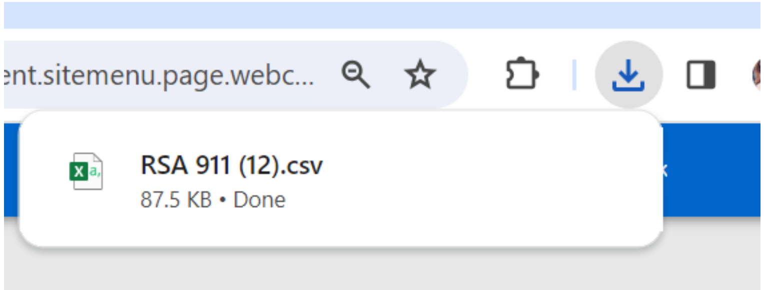


Figure 16-11 RSA911 Generated

16.3.2 RSA17

Not all roles have access to run the RSA911 Report. It is limited to Product Administrator, Supervisors and Fiscal Clerk roles.

1. To run the RSA911 report navigate to the left menu and click on **Federal Reports**.
2. When the menu expands click on **RSA17**.

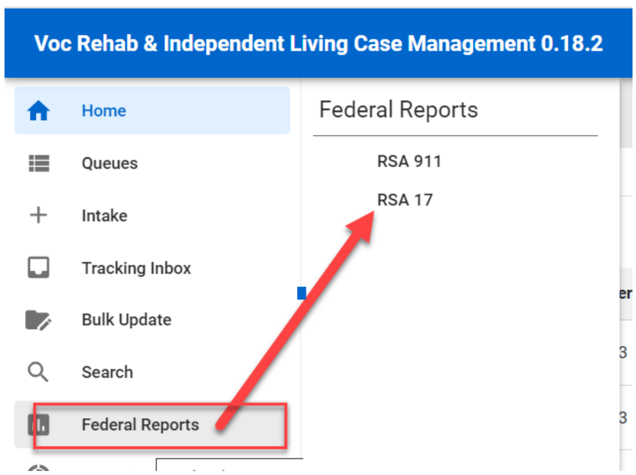


Figure 16-12 Main Menu > RSA 17

3. The RSA 17 page will display. If the RSA 17 has been run previously they will display and be selectable for view. The file(s) can be selected and opened.

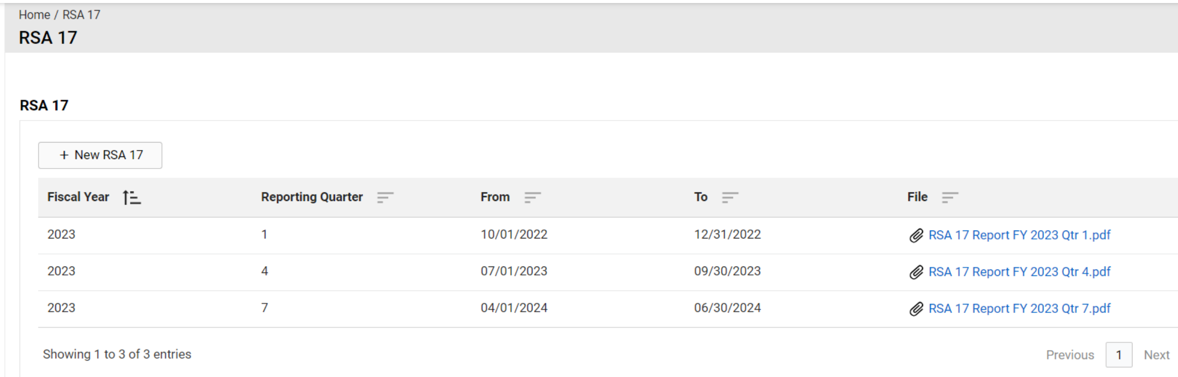


Figure 16-13 RSA17 Screen

4. To run the report click the button **+New RSA 17**.
5. The RSA17 form will display.

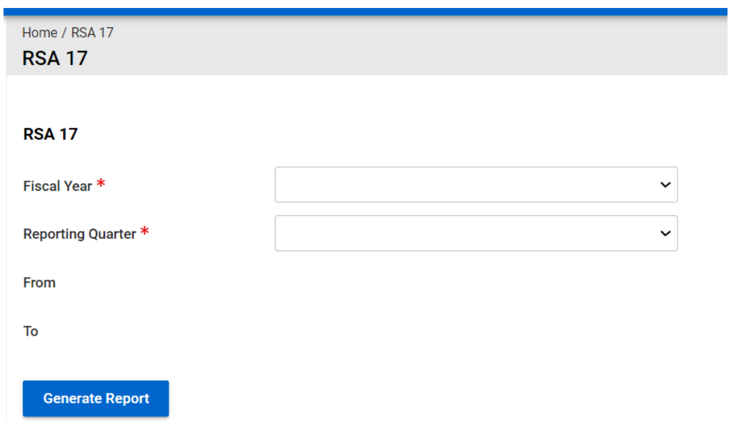


Figure 16-14 RSA17 Form

6. Fill in the report parameters. The 'From' and 'To' dates will populate automatically and are read only based on which Fiscal Year and Reporting Quarter are selected.
7. The report will display.

RSA-17 OMB Control Number: 1820-0017

VOCATIONAL REHABILITATION FINANCIAL REPORT (RSA-17)		
A. Grant Award Information		
1. Federal Grant Award Number*	2. Federal Fiscal Year* 2024	3. Grant Period (From/To)* 10/01/2023 - 12/31/2023
4. Recipient Organization*		
5. Basis of Accounting Accrual Cash	6. Reporting Period End Date* 12/31/2023	7. Final Report No
8. DUNS Number*	9. Recipient Account Number or Identifying Number*	

B. Federal Funds	**Amount**
10. Total Federal Funds Awarded*	
11. Federal Cash Receipts	

Figure 16-15 RSA17 Report

8. Navigating back to the **Menu** > **Federal Reports** > **RSA17**; the RSA17 that was generated will display.

RSA 17

+ New RSA 17

Fiscal Year	Reporting Quarter	From	To	File
2023	1	10/01/2022	12/31/2022	RSA 17 Report FY 2023 Qtr 1.pdf
2023	4	07/01/2023	09/30/2023	RSA 17 Report FY 2023 Qtr 4.pdf
2023	7	04/01/2024	06/30/2024	RSA 17 Report FY 2023 Qtr 7.pdf
2024	1	10/01/2023	12/31/2023	RSA 17 Report FY 2024 Qtr 1.pdf

Showing 1 to 4 of 4 entries Previous 1 Next

Figure 16-16 RSA17 Report Listings

16.4 Non-Federal Reports and Interfaces

16.4.1 PE Potentially Eligible (Pre-ETS) and PE Vocational Rehabilitation (Pre-ETS)

Note: The Vocational Rehabilitation Report and the Pre-ETS Report were originally one report that was broken into two pieces due to system limitations.

Additional 'duplicate' reports added to allow for ease of use with JAWS:

- 508 PE Pre-ETS Report
- 508 PE Vocational Rehabilitation

1. From the main menu navigate to the **Reporting** tab.

2. When the menu expands click on **Shared Reports**.

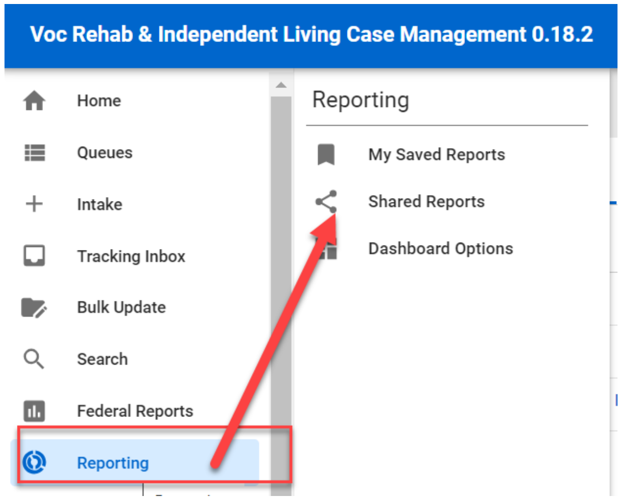


Figure 16-17 Main Menu > Shared Reports

3. Once clicked the Share Reports page will display. All reports that have been created and shared will display here.

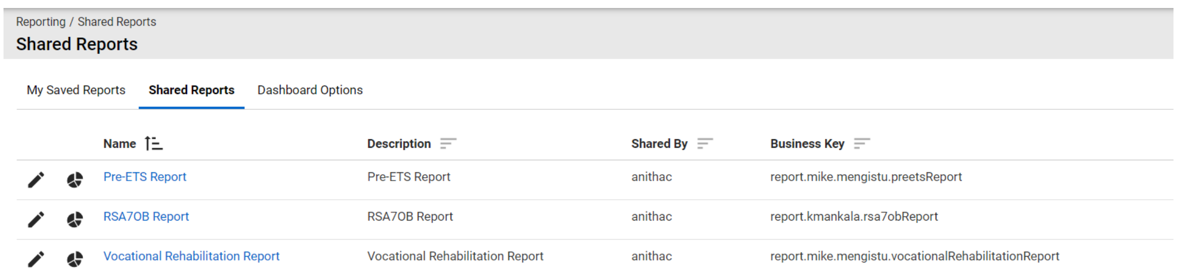


Figure 16-18 Shared Reports Screen

4. Click on the **PE Pre-ETS Report** or the **PE Vocational Rehabilitation Report** link.

5. The report parameters form will display.

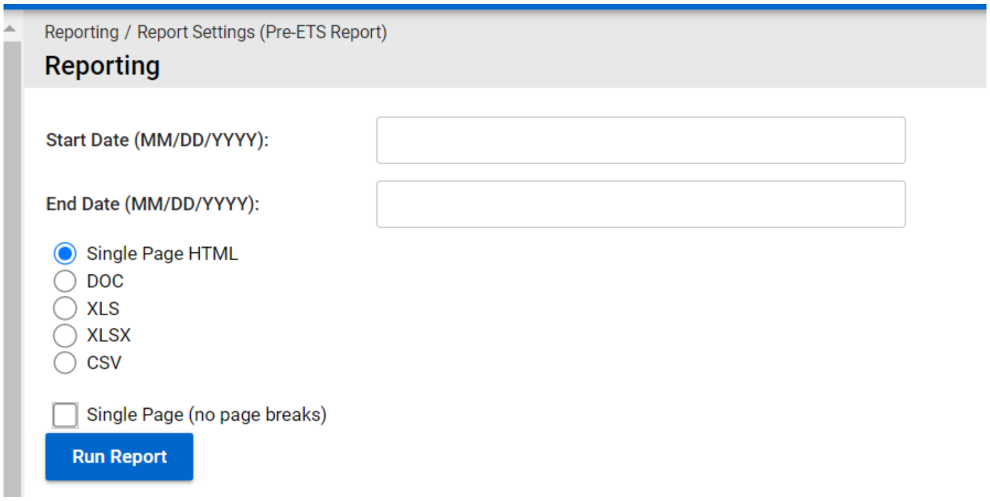
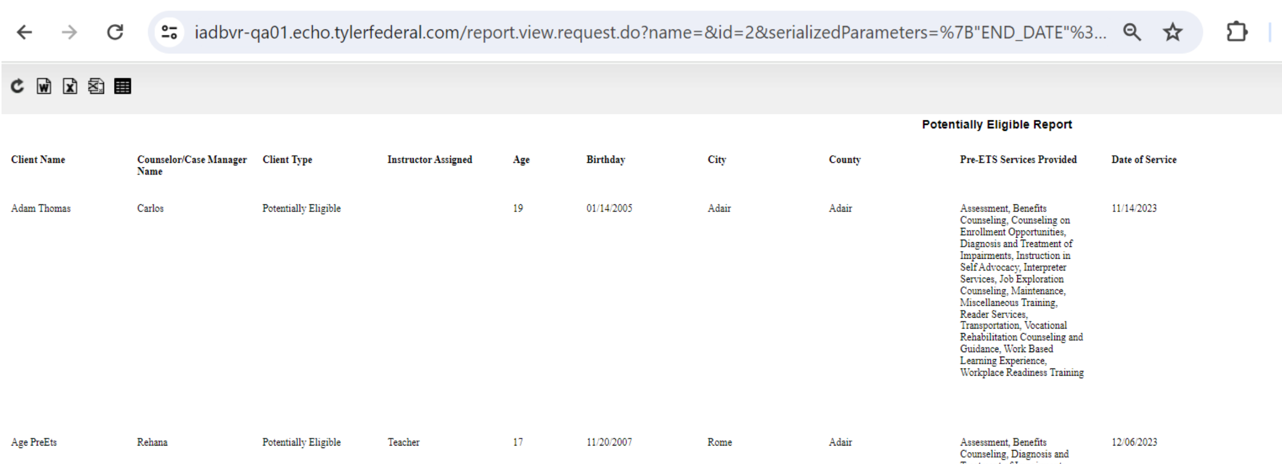


Figure 16-19 Pre-ETS/VR Reporting Parameter Form

6. Enter in the Start and End date in a MM/DD/YYYY format and choose the format. Depending on the format chosen will determine how the report is ran and displayed. If HTML is selected a new window will open to display the report.

7. Click the **Run Report** button.

8. The report will display.



Client Name	Counselor/Case Manager Name	Client Type	Instructor Assigned	Age	Birthday	City	County	Pre-ETS Services Provided	Date of Service
Adam Thomas	Carlos	Potentially Eligible		19	01/14/2005	Adair	Adair	Assessment, Benefits Counseling, Counseling on Enrollment Opportunities, Diagnosis and Treatment of Impairments, Instruction in Self Advocacy, Interpreter Services, Job Exploration Counseling, Maintenance, Miscellaneous Training, Reader Services, Transportation, Vocational Rehabilitation Counseling and Guidance, Work Based Learning Experience, Workplace Readiness Training	11/14/2023
Age PreEts	Rehana	Potentially Eligible	Teacher	17	11/20/2007	Rome	Adair	Assessment, Benefits Counseling, Diagnosis and	12/06/2023

Figure 16-20 Pre-ETS/VR Report Displayed

16.4.2 SWIS Import/Export

1. From the left menu hover over Configuration. When the menu expands under the 'Pages' header select **Shared Pages**.

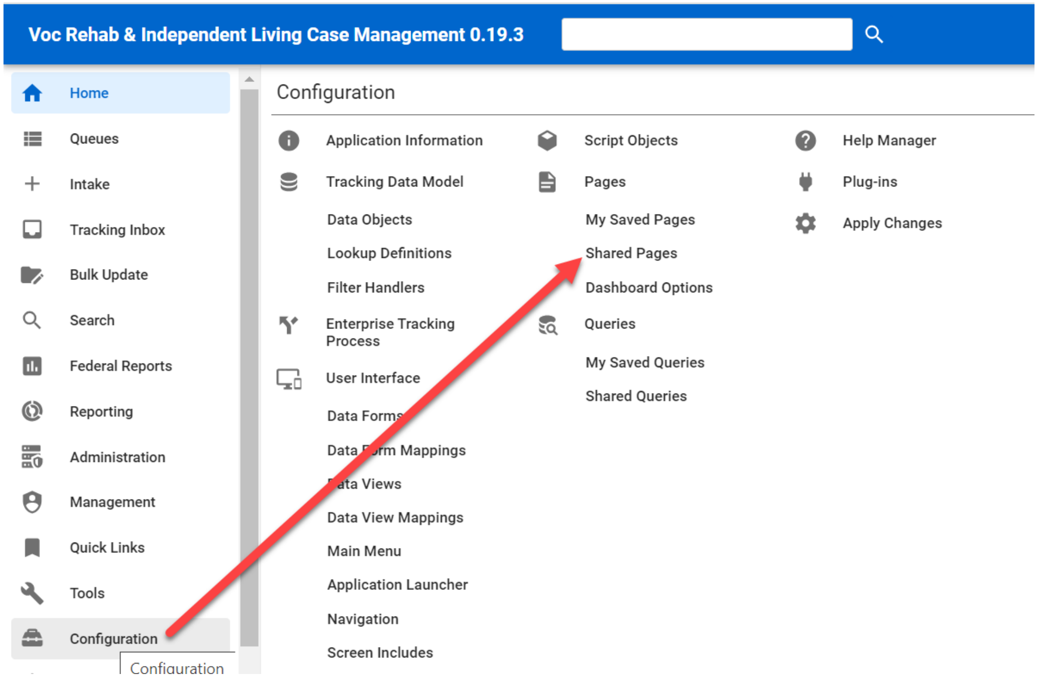


Figure 16-21 Menu > Configuration> Shared Pages

2. The Shared Pages Listing will display:

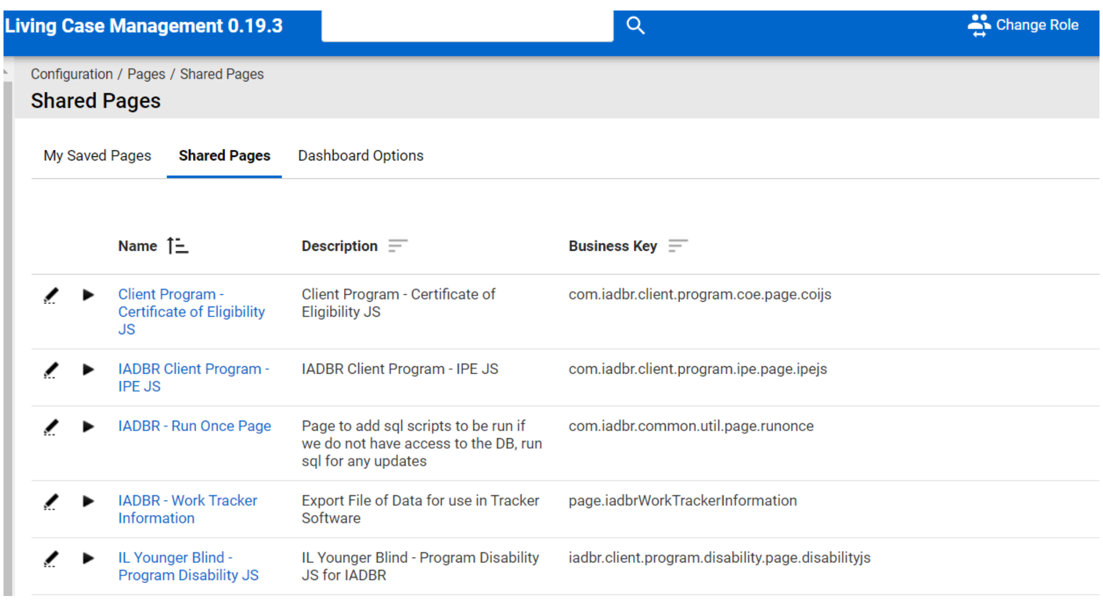


Figure 16-22 Shared Pages Listing Display

3. Select the report/interface file:

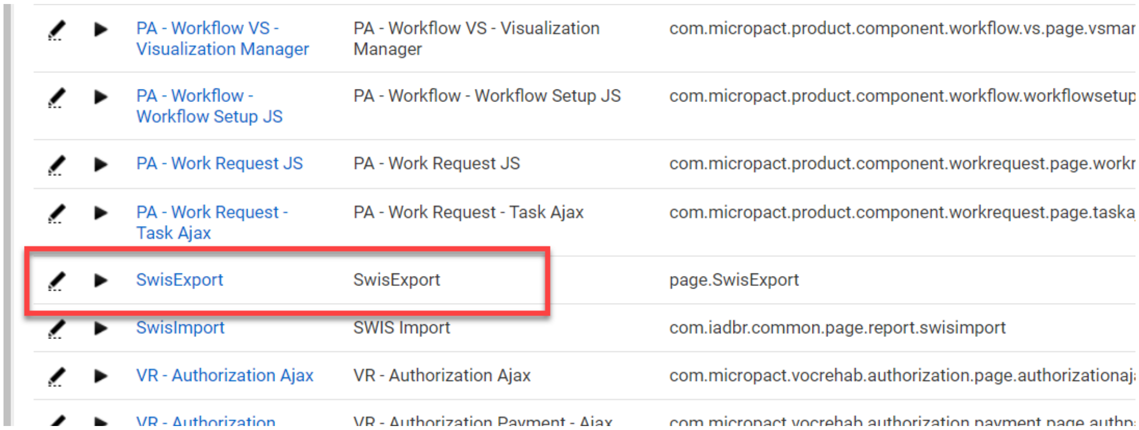


Figure 16-23 SWIS Export File

4. The SWIS Export file (.txt) will automatically download to the users download files (unless a different system preference has been created).

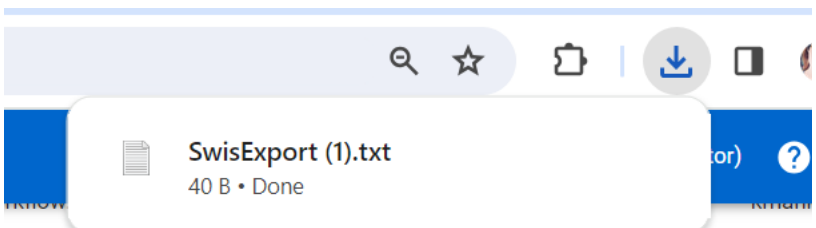


Figure 16-24 SWIS Export File

16.4.3 Tracker

Not all roles have access to run the Work Tracker Information Report. It is limited to Product Administrator.

1. As an Administrator from the left menu navigate to **Configuration**.

2. When the menu expands select **Shared Pages** in the second column.

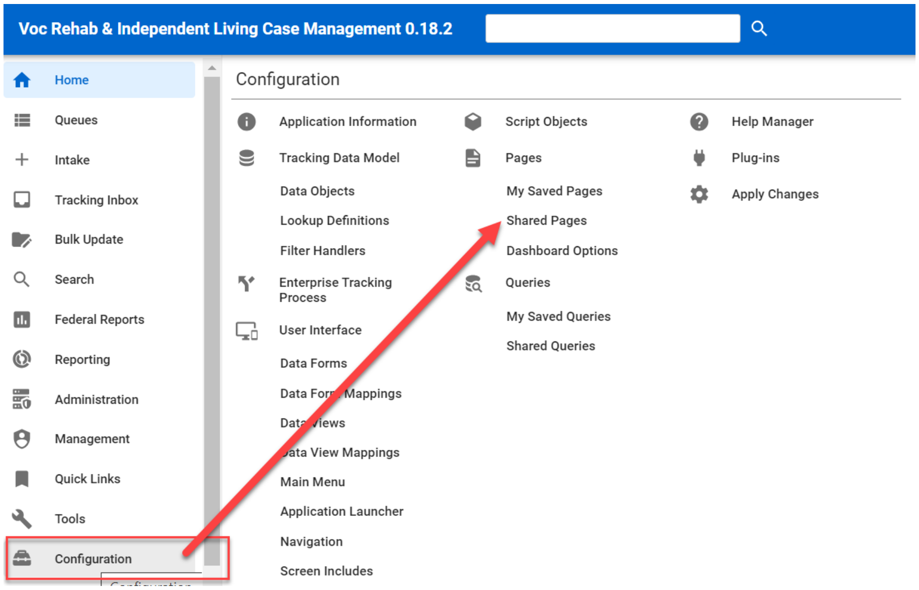


Figure 16-25 Main Menu > Configuration > Shared Pages

3. The Shared Pages page will display with all pages available.

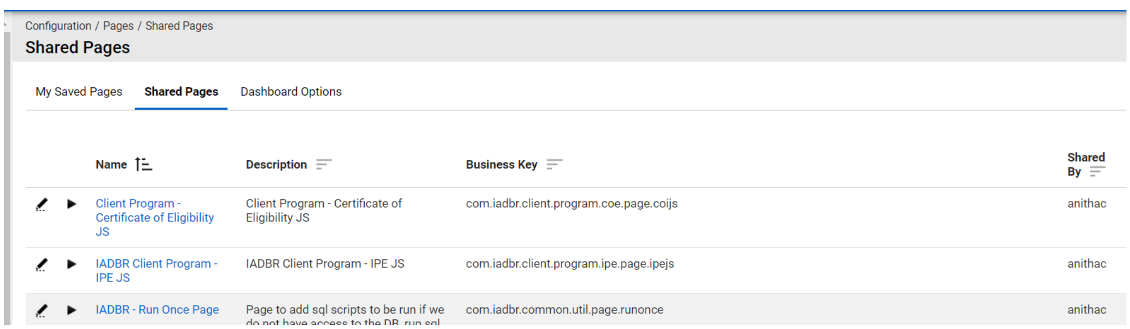


Figure 16-26 Shared Pages

4. Locate the **IADBR - Work Tracker information**.

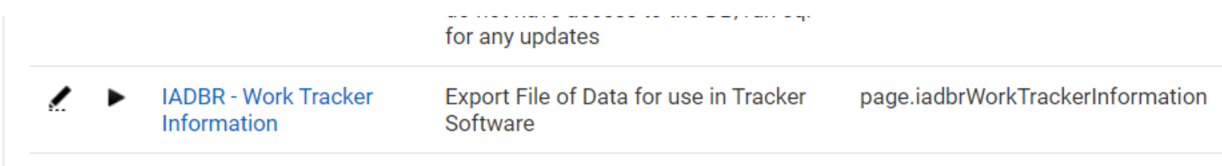


Figure 16-27 IADBR - Work Tracker information

5. Once clicked, the file will generate and be in the users downloads.

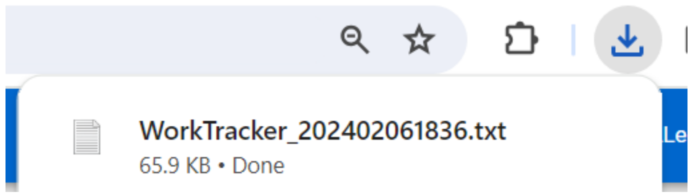


Figure 16-28 Work Tracker Information Generated

6. When opened, the file will be in Notepad.

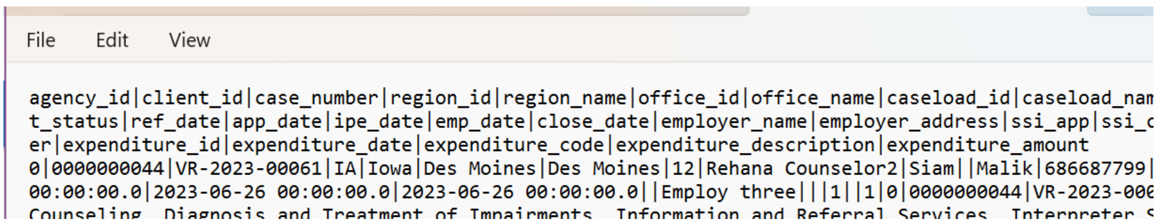


Figure 16-29 Work Tracker Report Generated in Notepad

16.4.4 Legislative Factbook - Post Go-Live

16.4.5 Board Statistics Report - Post Go-Live

16.4.6 RSA7OB - Post Go-Live

16.4.7 ACL704 - Post Go-Live

16.4.8 WIOA Report for Interface - Post Go-Live

17 Online Help

The Online Help module provides searchable help topics to Entellitrak users and administrators. Help pages contain an overview of the basic Entellitrak functions, such as navigating, searching, and data entry. Users have the ability to navigate the Contents tree as well as to open, read, and search for Help content.

It also provides the ability to add images, cross-references, as well as enabling context-sensitive Help, as well as letting customers use their own Help located outside of Entellitrak.

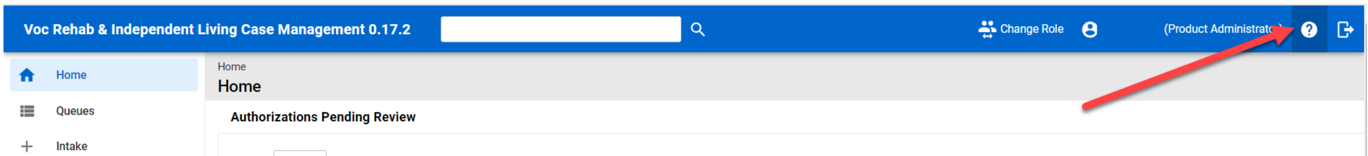


Figure 17-1 Online Help Icon

Clicking the circle with the question mark on the top right side of the screen will open a new window for Online Help.

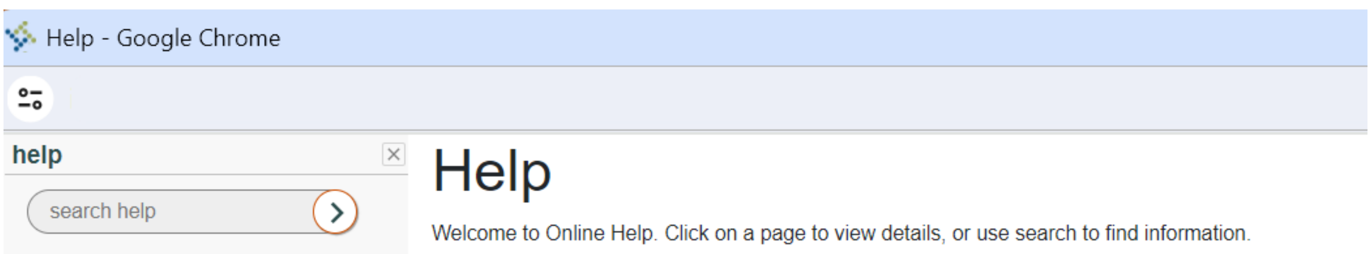


Figure 17-2 Online Help Window

The Help module is divided into two panels:

- Left Panel – contains the Search box and Table of Contents
- Right Panel – displays the selected page

18 List of Figures

19 List of Tables