Pre-ETS Vendor Portal User Guide

Contents

Purpose

The purpose of the Pre-ETS Vendor Portal system is to collect federally and state required data in a format that will facilitate combined VR and Pre-ETS participant reporting at the level of detail required by the Rehabilitation Services Administration (RSA).

The portal provides a mechanism for providers to submit the data in the required format and allows for the application of business and federal rules at the point of data collection.

The system has been provided for this purpose by Vocational Rehabilitation (VR) and is required to be used for Pre-ETS consumer reporting. The system will be maintained by VR for this purpose.

Questions, issues, and suggestions regarding the Pre-ETS Vendor Portal can be directed to email address: *fssa.pre-ets@fssa.in.gov* .

Security

User Authentication

To access the system, all users must register to receive a valid user authentication logon-ID. Users will access the system via the authentication website and will be redirected to the Pre-ETS Vendor Portal system upon successful user authentication.

User Roles

Users of the Pre-ETS Vendor Portal system include: VR Pre-ETS Contractors, VR Counselors and VR Pre-ETS Administrators.

Security rights are both hierarchical and role based.

VR Pre-ETS Administrators have State-wide access to monitor and review data, run reports, respond to inquiries and to update data as needed. The administrators will also have “override” capability to make changes to data that normally would be disallowed. This override capability may be needed to change data after it has been reported to RSA (when the VR Pre-ETS Administrator obtains RSA approval) or to make other special exceptions to normal business rules as needed.

VR Pre-ETS Contractors have three user roles: Contractor Leads, Agency Leads and Pre-ETS Consultants.

Contractor Leads and Agency Leads have elevated rights over Pre-ETS Consultants.

Case Ownership

A case can be assigned to anyone within a Contractor group (Contractor Lead, Agency Lead, or Pre-ETS Consultant). A case cannot be assigned to a VR Pre-ETS Administrator. The case assignment allows the system to track who is ‘responsible’ (i.e., ownership) for a registered Pre-ETS consumer. It also allows tracking of service provision at the agency level within a contractor group.

When a consumer is entered into the system via the Intake screen, the consumer’s case is automatically assigned to the person that entered the information. The assumption is that the person entering the case will be the Pre-ETS consultant who will be responsible for the case on an on-going basis. However, a case can be transferred to another Pre-ETS consultant as needed to any other person within the same

Contractor group. Contractor Leads and Agency Leads will have access to transfer cases to any Pre-ETS Consultant in any of the Agencies within their Contractor group. Statewide, VR Pre-ETS Administrators can transfer cases across Contractor groups.

Case Access

All users within the same Agency within a Contractor group will have full access to each other's cases. Contractor Leads will have access to all cases for all Agencies within the Contractor group. Inter-agency access is the default; intra-agency access is not granted. This will be reflected in drop-down selections throughout the system. The only exception to this rule is the Transfer Case function which allows Agency Leads as well as Contractor Leads to transfer case assignment across Agencies within the full Contractor group.

Users from one Contractor group will *not* have access to other Contractor groups' consumer's data (unless acting as an Agency under more than one contractor). For Agencies under more than one Contractor, inter-agency versus intra-agency rules still apply.

When a Contractor also serves as an Agency under another Contractor, their Contractor group will be identified as their 'home' group, but they will be able to select the alternate Contractor as needed when providing services as an Agency under an alternate Contractor group. This will be reflected in drop-down lists throughout the system. For example, Sycamore Services is both a Contractor and also serves as an Agency for Easterseals Crossroads. For Sycamore Services consultants, their 'home' Contractor will default to Sycamore Services. However, Easterseals Crossroads will also be available for selection as an alternate Contractor as needed.

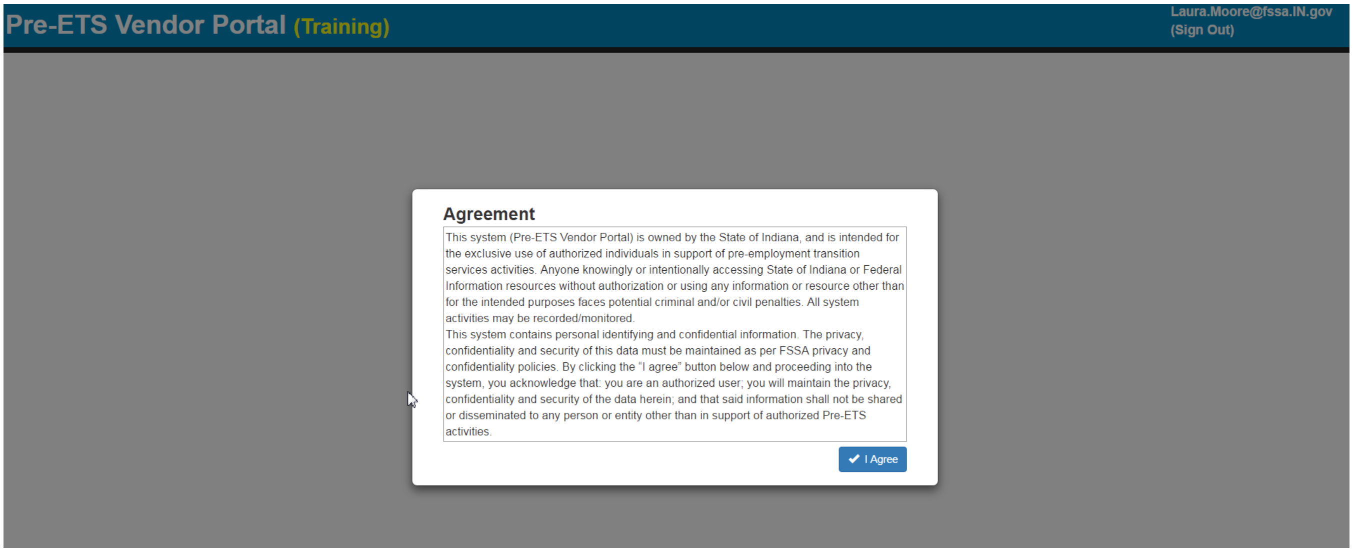
Privacy and Confidentiality/HIPAA

This system is used to collect consumer data that is required for VR's federal reporting to RSA. Some of the required data elements include PII and PHI confidential information. This information is protected under HIPAA. Consumer personal information must be protected at all times, while on-line or while using hard-copy materials. Any potential breach of protected information must be reported to the VR Pre-ETS administrator immediately.

In addition, FSSA contractors must comply with FSSA Privacy Compliance Policies. Contractor staff may only access, use, and disclose consumer personal information as authorized and permitted by FSSA VR policies and procedures. Any access to, use of, or disclosure of consumer personal information not authorized or permitted by such policies and procedures is strictly prohibited and constitutes a violation of the Privacy Compliance Policies. A full copy of the FSSA Privacy Compliance policies is available at website: www.in.gov/fssa/thehub/files/FSSA%20Confidentiality_VR_V1%20Training.pdf

User Privacy and Confidentiality Agreement

When users first login to the system, an agreement to comply with privacy and confidentiality policies will be presented. Users will not be permitted to access the system without first reviewing/agreeing to adhere to privacy and confidentiality policies. This agreement screen will only be presented upon the user's first access of the Pre-ETS system. Upon agreement, the agreement date will be recorded, and the user will be allowed to proceed to the Pre-ETS Vendor Portal. The user will not be presented with the agreement screen again.



Inactive Employees

It is the responsibility of the Agency and/or Contractor Lead to validate that a contractor's access to consumer personal information is immediately terminated upon leaving their agency or upon transferring to another business unit which should not have access to the Pre-ETS consumer data. This includes all access to electronic and/or paper files containing any client personal information.

For this purpose, an Inactivate User administrative function will be provided under the Administrative Menu. This will be available to Agency and Contractor Leads as well as VR Pre-ETS Administrators. [Note: Until this function is available, please email *fssa.pre-ets@fssa.in.gov* immediately when a user inactivation is needed.]

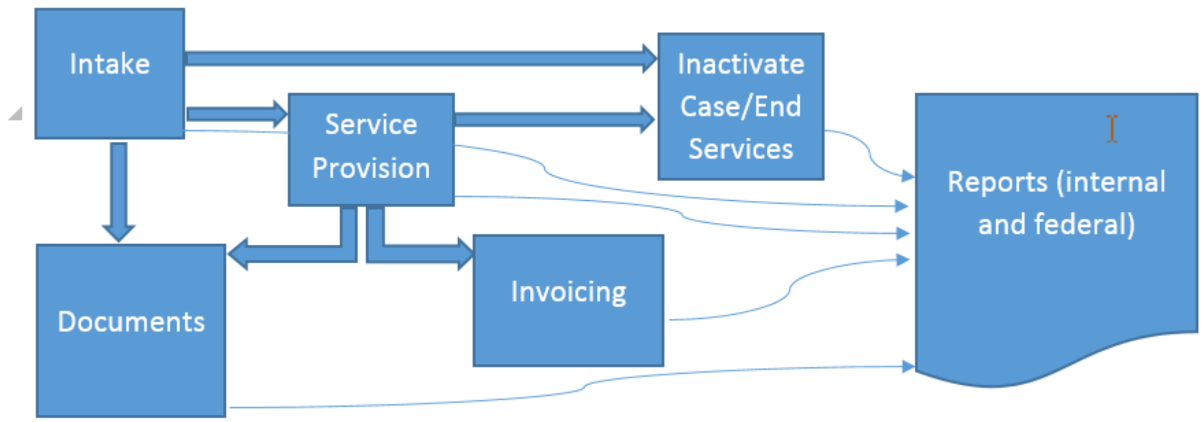
System Timeouts due to Inactivity on the screen

If there is no activity on the selected screen for one hour (60 minutes), the system will automatically time out. This is to protect the confidentiality of data within the system if you have stepped away from your device but have forgotten to log out. A message will be displayed:

> Your session is about to time out. You will automatically log out from your current session in:
>
> M:SS *[Note: This will display how many minutes before the automatic logout will occur.]*
>
> If you would like to remain logged in, please click "OK".

Simply click the OK box if you would like to remain logged in.

Basic Workflow in Life of Pre-ETS Case



The Pre-ETS consumer must first complete Intake information to register as a Pre-ETS consumer.

After the consumer is registered, Services can be provided as needed until such time as the Consumer graduates, no longer requires services, or has aged out of the program at which time the consumer's Pre-ETS case can be inactivated (i.e., services will be ended).

Students can continue to receive Pre-ETS services when they move to post-secondary education, until they age out of the program at 23.

Alternatively, if the consumer decides not to pursue services, the case can be inactivated after Intake and prior to Service Provision.

As a result of Intake and Service Provision, and all through the life of case, collateral documentation can be collected and uploaded for the case as needed.

Services will be aggregated and invoiced (in summary form with other consumer's services) on a monthly basis.

All information pertaining to the case will feed various Reports, both internal and federal reporting.

Note: It is possible for a Pre-ETS Consumer to also receive VR services or to transition from Pre-ETS to VR services. This means that the consumer can already be a VR consumer at the time of Pre-ETS Intake, or they can apply for VR services during Pre-ETS participation, or they can apply for VR services after Pre-ETS participation.

Getting Started

The Pre-ETS Vendor Portal will utilize Azure active directory authentication based on registered users. This allows for two levels of authentication; the first active directory authentication level must be passed for the user to proceed to the Pre-ETS Vendor Portal. The Pre-ETS Vendor Portal system will then apply a second layer of authentication to allow login to the system. If both levels of authentication are passed, security rights within the Pre-ETS Vendor Portal will be role-based.

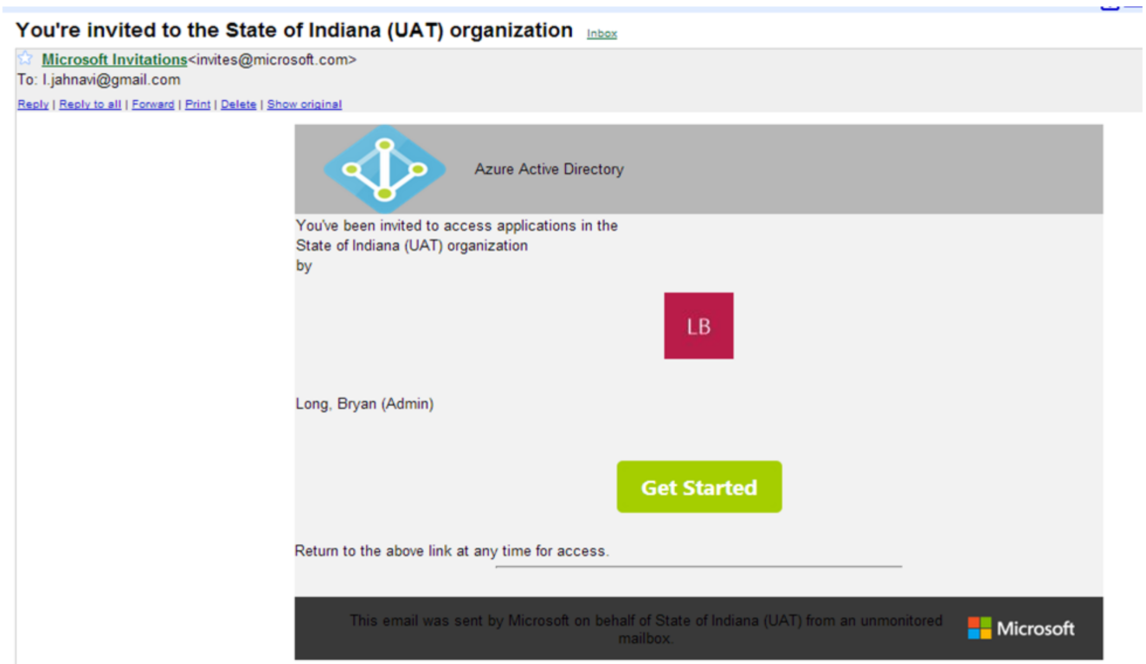
When a user is first registered, they will receive email notification(s) regarding a Microsoft Invitation (You're Invited!) from Microsoft Invitations. An email will be sent for each Vendor Portal environment for which the user has been registered (usually either Training/UAT or Production). The email will include a Get Started link which allows the users to complete the registration of their login ID. New users must follow the instructions and proceed through the screens until the registration is completed.

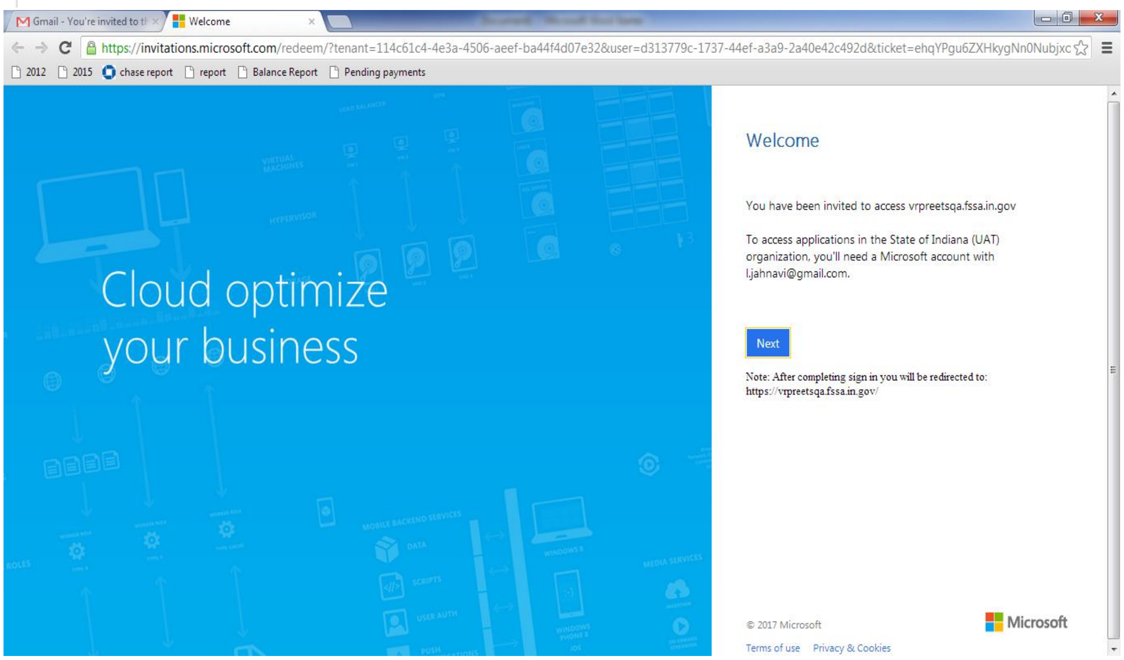
Note: FSSA/VR State employees will not receive Microsoft Azure email invitations for Pre-ETS Production environment. They will be able to access the URL after they have been registered by an administrator. They may however need to receive an invitation for the Pre-ETS Training environment, which will be sent by Microsoft Azure within 2 hours of registration.

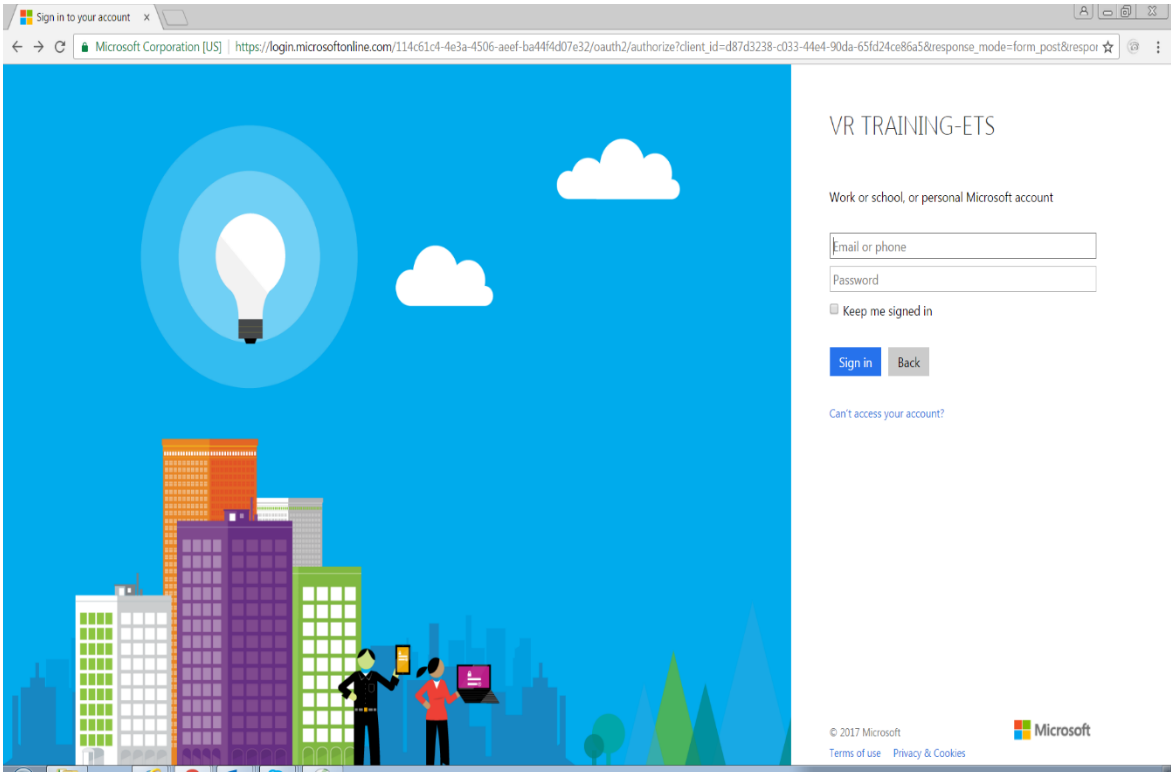
After successful registration, after launching the URL just click on the desired environment to proceed to the vendor portal. When prompted for email or phone, please use the email address that you specified on your registration form.

Upon the first access to the Pre-ETS Vendor Portal, an agreement screen will be launched as mentioned and displayed in the User Privacy and Confidentiality Agreement section. Review and click the I Agree button to proceed with access to the system.

If any issues are encountered that prevent login, please contact *fssa.pre-ets@fssa.in.gov* to report the issue and obtain assistance.


You're invited to the State of Indiana (UAT) organization
Inbox
Microsoft Invitations<invites@microsoft.com>
To: l.jahnavi@gmail.com
Reply | Reply to all | Forward | Print | Delete | Show original
Azure Active Directory
You've been invited to access applications in the State of Indiana (UAT) organization by
LB
Long, Bryan (Admin)
Get Started
Return to the above link at any time for access.
This email was sent by Microsoft on behalf of State of Indiana (UAT) from an unmonitored mailbox.
Microsoft


Gmail - You're invited to t
Welcome
https://invitations.microsoft.com/redeem/?tenant=114c61c4-4e3a-4506-aeef-ba44f4d07e32&user=d313779c-1737-44ef-a3a9-2a40e42c492d&ticket=ehqYPgu6ZXHkygNn0Nubjxc
2012
2015
chase report
report
Balance Report
Pending payments
Cloud optimize your business
Welcome
You have been invited to access vrpreetsqa.fssa.in.gov
To access applications in the State of Indiana (UAT) organization, you'll need a Microsoft account with l.jahnavi@gmail.com.
Next
Note: After completing sign in you will be redirected to: https://vrpreetsqa.fssa.in.gov/
© 2017 Microsoft
Microsoft
Terms of use
Privacy & Cookies



Home Page

Upon accessing the system, the user will be presented with the Home Page. The current email address of logged in user will be displayed in upper right corner. From this page, the user can:

Search for existing consumers

Choose to enter a new Intake

Search for/enter new Services or Stipends or Student Groups

Search for/enter new Rubrics

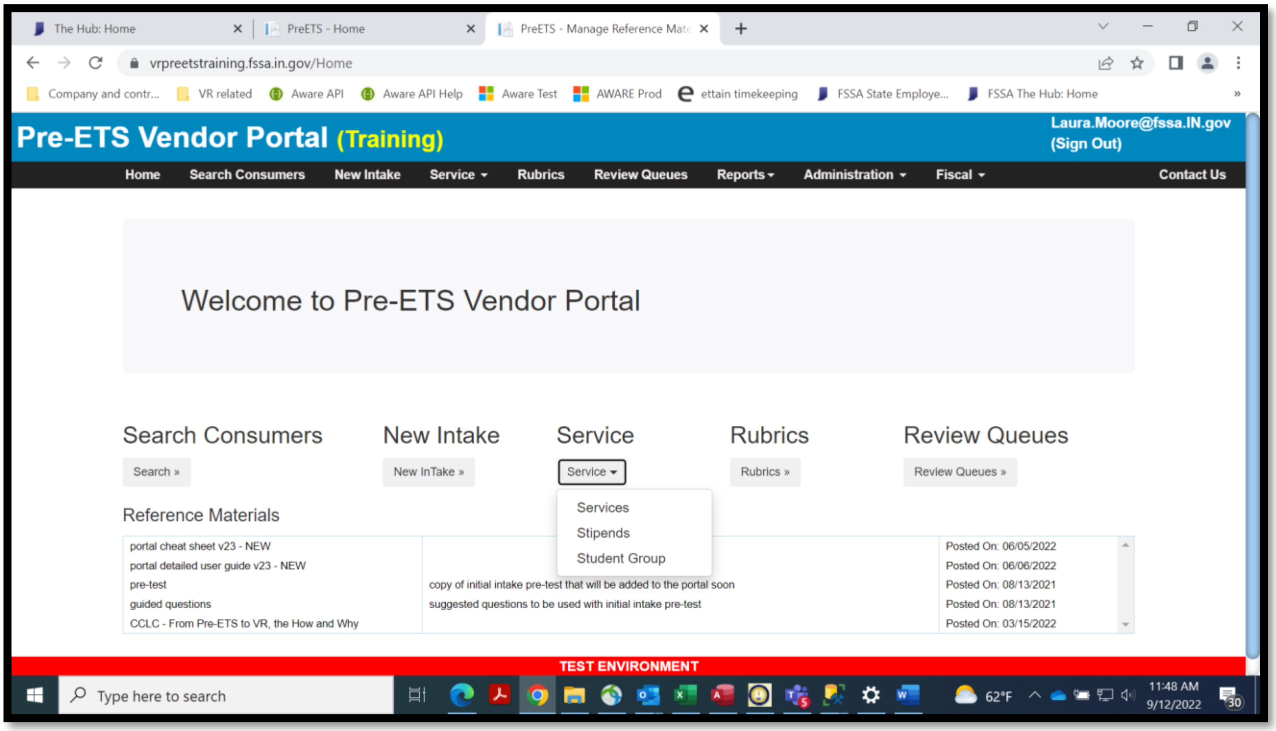
Use the Review Queue to search for Recommended Services

Access Reference Materials

Access the Administration Menu

Access the Fiscal Menu

Sign out of the system



Contact Us

This page contains contact information to report issues, questions, suggestions, and concerns to the VR Pre-ETS Administrators for their review.

Reference Materials

This function will allow users to review reference materials posted by VR Pre-ETS Administrators. The Reference Materials are available to all users.

The Reference Materials list will only be displayed when Reference Materials have been added to the system by VR Pre-ETS Administrators (i.e., the Header and the list will remain invisible unless there are documents to display).

The list consists of three columns. The leftmost will contain the document name, the middle column will contain comments, and the rightmost column will contain the date that the document was posted to the portal.

To open a Reference Material document, right-click on the document name in the leftmost column. This will launch the document; then click Open or Save.

VR Pre-ETS Administrators will have the ability to 'pin' documents to the top of the list, to ensure that they are always be visible as additional reference materials accumulate.

Unpinned documents will be listed beneath the pinned documents in descending posted date sequence, (i.e., with most recent postings on top).

As reference materials accumulate and the list becomes longer, the list will be scrollable with up/down arrows on the right side of the list.

Consumer Search

This function will allow users to search for specific consumer records. A variety of search criteria can be used, in different combinations.

Type of Search

There are five (5) types of Consumer Searches: Consumer ID, Consumer Name, School Name, Temporary SSN, and Missing Document. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

The most specific consumer search criteria (filter) that can be applied is the Consumer ID. This is the unique Pre-ETS consumer number that is assigned to the consumer's case at the time of intake.

For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.

Example: Smith,John or Smith,J).

If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed. Note: The Preferred Name is displayed in results in parantheses after the first name, but is not used in the search and so should not be included in the Consumer Name search field.

The Schools drop-down will present a full list of the schools covered under the Pre-ETS Contracts. This drop-down will list only the schools covered by the selected Contractor.

- Note: The School Name and the Expected Year of Graduation that are displayed on Consumer Search represent the 'latest' (most current) school. The school that is displayed will be based on the school on the Post-Sec/Education Level page that has the most recent start date. That school and its expected graduation date will be displayed on Consumer Search.
    - Education level records include the school entered on the Intake page and any additional school entered on the Post-Sec/Education Level page. If no additional schools have been added, the Intake school and expected grad date info will be displayed on all searches.
    - When Type of Search = School is used for Consumer Search, the search will use the most current school.

Temporary SSN – This will result in a list of consumers that had a temporary SSN created by the system due to the 'real' SSN not being available at the time of the intake. Temporary SSNs begin with '999' per

RSA requirements. Note: The Temp SSN column in the results grid will show Yes or No. Yes indicates that a temporary SSN was assigned. No indicates that a 'real' SSN was entered.

Missing Document – The Missing Document search will provide a drop-down list of document types, as well as the value All. All will result in a list of consumers that are missing all documents (i.e., no documents have been uploaded). The other search items will result in a list of consumers that are missing only the specified document types. Supporting documentation is required, and this is a useful tool to identify cases where such documents are missing.

Intake Date From and Intake Date To – This will result in a list of consumers whose intake date occurred within the specified date range. The Intake Date will display in the results grid.

Additional Search Criteria

Additional / multiple filters can be applied: Consumer Status, Contractor, Agency, or Pre-ETS Consultant. The more specific the search criteria, the fewer results that will be displayed.

The Consumer Status values include:

- Intake (Intake means that the consumer's Intake record has been entered, but no services have been entered)
- In-Service (In-Service means that the Intake and Service(s) have been entered)
- Inactive (Inactive means that the consumers' services have ended, and as a result the consumer's Pre-ETS 'case' is closed)
- Active (Intake and In-Service) (Active means that the Intake and Service(s) have been entered)

Teacher of Record is a wild card search, meaning that if any portion of the field value contains the search text, the results will be included in the result set. For example, a consumer's intake record has Teacher of Record value 'Mr. Jones'. A search of 'jones' will include the record in the result set (if other search criteria are also met).

The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.

The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.

The Pre-ETS Consultant drop-down will display a list of names of Contract Leads, Agency Leads and Pre-ETS Consultants based on the user's security and/or limited by the selected Contractor/Agency.

If a Search field is not used, then it will default to all that are available per the user's security clearance.

Contractor Leads will have access to all information for all Agencies within their contract. For Contractor Leads (or for VR Pre-ETS Administrators), if more than one Agency within the contract is assigned to work with the consumer, the consumer will show in the grid results more than once (once for the Primary/ assignment and again for Secondary assignments).

The Search button will display all results matching the criteria in the results grid.

Results Grid

Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

If a record in the grid is selected and 'double-clicked', the action taken will be the same as selecting the record and clicking on Add/Modify Service.

Export to Excel

All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII.

Available Functions

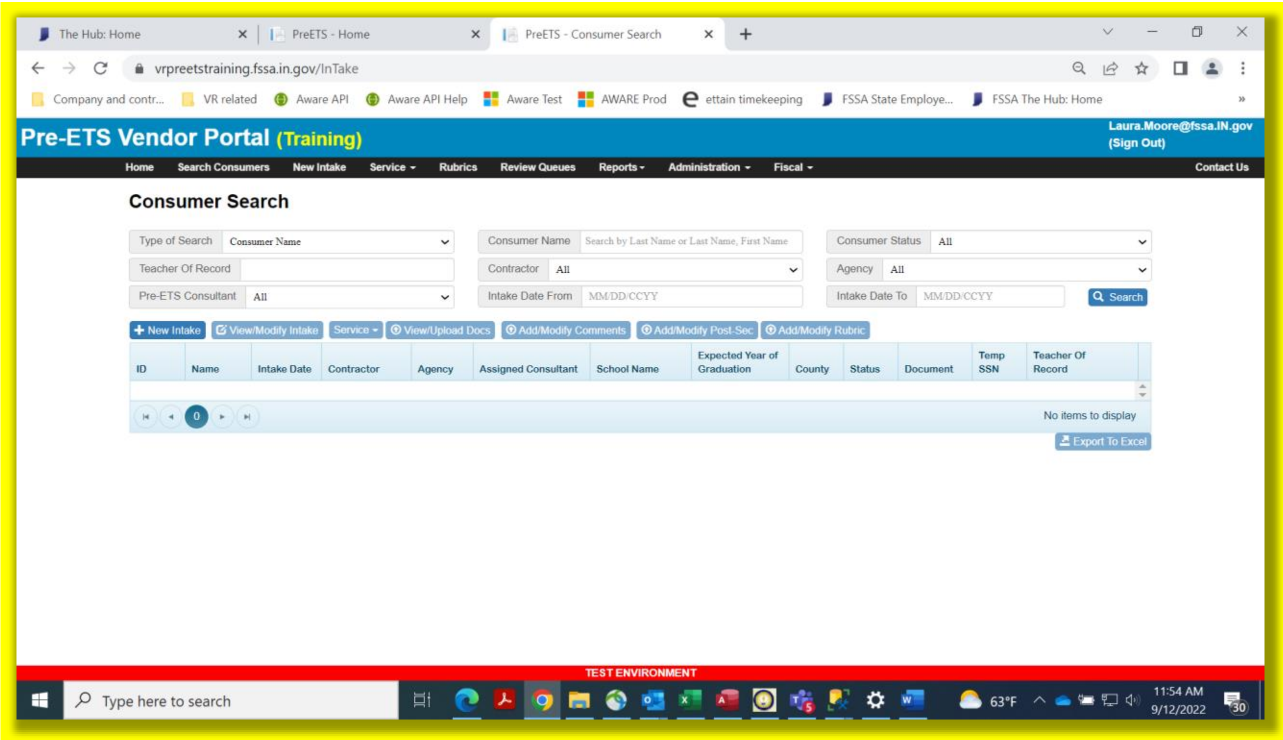
A New Intake can be entered, or when a consumer record is selected in the grid, other available functions include: View/Modify Intake, a Services drop-down (includes Add/Modify Services and Add/Modify Stipends), View/Upload Docs, Add/Modify Comment, Add/Modify Post-Sec, Add/Modify Rubric and Export to Excel for the results grid.

When launched from Consumer Search for a selected consumer, the portal will recognize that there are no existing Stipend Sessions or Rubrics and will default to a New Stipend or New Rubric screen with the consumer already defaulted. If there is an existing Stipend Sessions, the Stipend Search will be launched for the selected consumer. If there is an existing Rubric for the consumer, the Rubrics page will be launched in its current state of completion.

When viewing existing Intake records, if a consumer is shared, only the Primary Contractor/Agency will be able to update the Intake information. Secondary Contractor/Agencies may view the Intake but cannot change the information.

If the desired consumer record is not found in the results grid, the New Intake function is available and can be used to enter a new consumer intake record.

Note: Add/Modify Services and Add/Modify Stipends will disallow the addition of the first new service for a consumer if either or both required pre-requisites (an uploaded Disability Documentation document and a Completed Intake Rubric page) are missing.



Intake

No services can be entered for a consumer until the consumer's Intake information has been entered.

All fields in red font are required fields.

When a SSN is entered that matches an existing Pre-ETS consumer, an error message will display which will prevent the entry of a duplicate consumer.

When SSN is not available, a match will be performed, and an error will display which will prevent the entry of a duplicate consumer based on an exact match on Last Name, First Name, Date of Birth and Gender for an existing Pre-ETS consumer. A warning will be displayed for a possible duplicate consumer based on an exact match of Last Name, Date of Birth and Gender but a mismatch on First Name after the first two characters. The error for a possible duplicate consumer will not prevent entry. The Consumer ID and the Contractor with whom the consumer is registered will be provided in the warning message. The warning will not prevent entry in the off chance that the client has similar information but is not the same person. If the consumer is within your agency, you will be able to view the consumer information to determine if it is a duplicate. It is important to avoid entering duplicates as this causes errors with federal reporting. When in doubt and/or if you are unable to view intake information because the consumer is registered with another agency, seek assistance from FSSA Administrators via email at *fssa.pre-ets@fssa.in.gov.*

When the SSN is unknown or is not available, the system will assign a 'temporary' SSN in the format required by RSA (which starts with a '999'). Do not attempt to assign a 'fake' SSN, as the system must assign a unique SSN to each consumer for federal reporting purposes. To allow the system to assign the SSN, check the "SSN not available" checkbox. If at a later date the SSN is obtained, uncheck the checkbox to enter the SSN. The 'real' SSN should be entered whenever possible to match against VR consumers and to facilitate accurate federal reporting.

The SSN can and should be updated if a correction is needed. For example, if a temporary SSN was entered and later a valid SSN is provided, or if it is determined that a digit or two of the SSN needs to be corrected. The correction will be included in federal reporting.

The information that is available in Intake drop-downs will be limited by the user's security clearance, including School.

The Contractor drop-down will default to the user's 'home' Contractor, but if more than one is available per user's security clearance, they will be available for selection.

The Pre-ETS Intake Date is required but will *not* default to current date; it must be manually entered. It can be backdated. There is a back-date limit of 10-01-2016 (the earliest Pre-ETS contracts' start date.

- If a user attempts to change the Intake Date after the original entry, the following additional rules will be applied:
- Intake Date cannot be greater than any Service Session Date.
- Intake Date cannot be greater than the case's End Date (i.e., case inactivation date).

Preferred Name is an optional field that can be used for nicknames, or whenever the name preferred by the student differs from their legal name.

The consumer's age should be between 14 – 22 years old. An error will occur if the consumer is younger than 14 or already 23 or older at Intake per the DOB. This is to prevent intake and service provision to a consumer that is too old to receive Pre-ETS services per RSA.

More than one Race value can be entered by checking all applicable boxes. Minimally at least one Race must be entered.

Stated Disability is a drop-down field. Click the Select Stated Disability (for new intakes) or click Modify Stated Disability (for existing cases) to enter disabilities.

- Multiple disability options can be selected.
- After 12/3/21, 'Other (please specify)' will not be available for new entries but will display prior entries that used this option.

Disability Comments is an optional field that can be used if needed, for example to list specific medications, to identify the source of the disability information, to provide more specific information on the diagnosis, etc.

Mental Health Issues is an optional checkbox, which when checked will display a required 'Please specify diagnosis' field. The default for the checkbox is 'off'.

Education Level is used to specify the consumer's Secondary or Post-secondary current level of education at Intake. Note: A Post-Secondary/Education Level record is automatically created upon saving the Intake record.

For the Student Plan field, when the option "Has neither an IEP nor 504 Plan" is selected, a conditionally required field "Specify Other Verification of Disability" will appear and will be a required field. In addition to this field which identifies the manner in which the verification of disability was obtained (via Student Plan or other means), the actual supporting documentation must be collected and maintained, whether it is a copy of a 504 or IEP plan or other documentation that verifies disability.

For the School field, a list of valid schools for the selected Contractor will be available for selection. School is a required field. If you cannot find a school in the drop-down list, schools should be added using the Administration menu's Manage Schools function. This function is available to Contract Leads.

Note: Secondary Contractor/Agencies can view intake data, but if the consumer's school is not included in the Secondary Contractor's list of schools, the school field will not be displayed on the Intake screen.

The Expected Year of High School Graduation or Exit is used to show the expected graduation date, or a post-graduation Exit date (whichever is later). For example, some students may receive a certificate of completion with their class but decide to stay in school for another year. It is the later exit date that should be recorded if appropriate.

The Expected Year of High School Graduation or Exit cannot be in the past nor more than six years in the future.

- An error will occur for either of these two conditions that will prevent the entry of the Intake. For questions or concerns regarding provision of services to a particular consumer, please contact VR Pre-ETS administration at email *fssa.pre-ets@fssa.in.gov*.
- A warning message will be issued if the graduation date will occur when the consumer is 23 or older. This message won't prevent Intake entry but will alert the user that the consumer may be 23 or older at the Expected Year of High School Graduation or Exit (and thus the case may need to be closed prior to graduation due to RSA age restrictions for Pre-ETS services).
- A warning message will be issued if the graduation date will occur when the consumer is 23 or older.

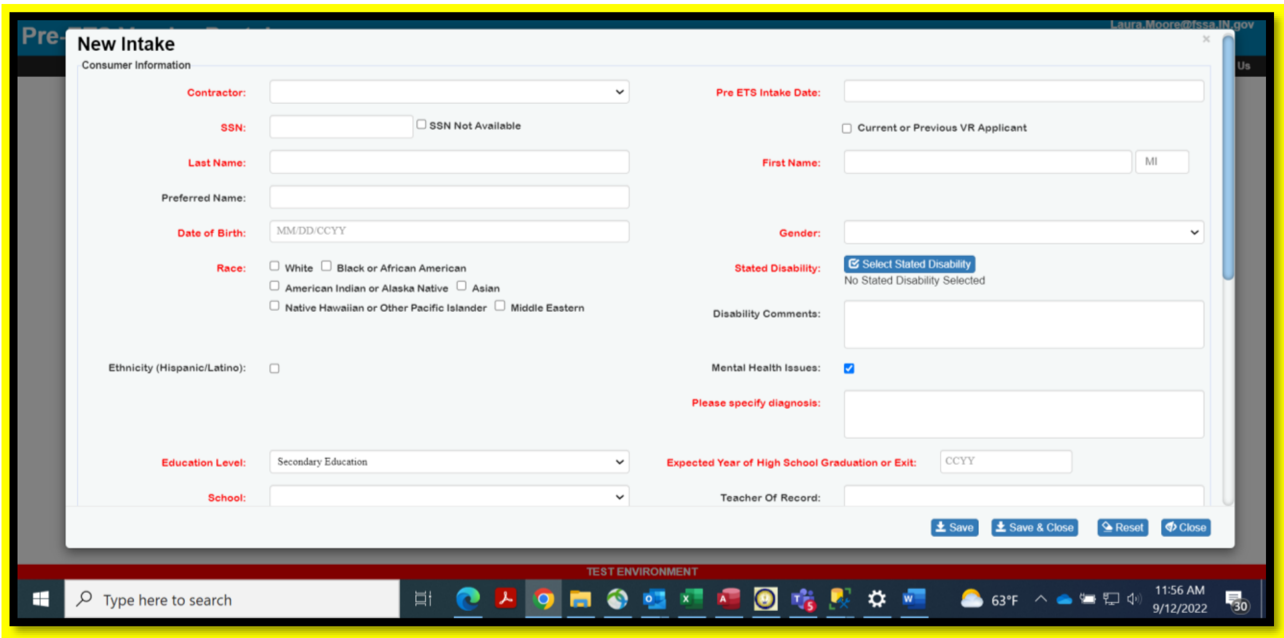
Teacher of Record is an optional field that can be used for example by career coaches who send end-of-semester summary service notes to teachers. The field has a corresponding search criterion and result set column on Consumer Search.

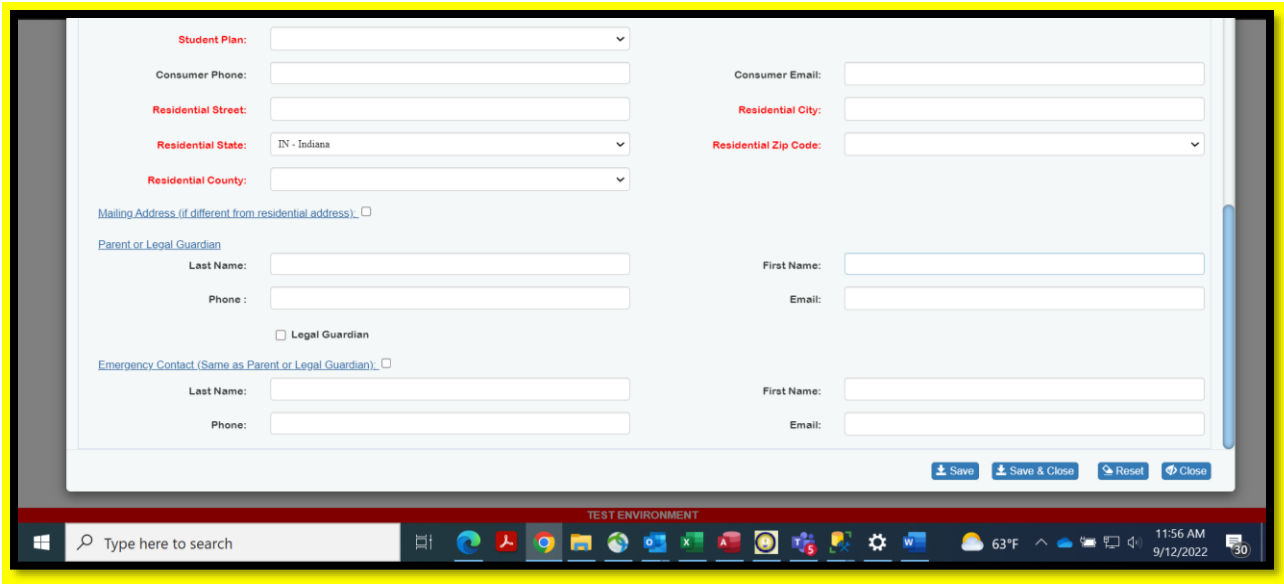
There are three optional sections at the bottom of the web page. Please note that there is a scroll bar on the right of the Intake screen to allow the user to scroll down to enter these sections:

- Mailing Address - This section does not need to be completed unless it is different than the residential address. To complete this section, check the checkbox and it will expand to allow the fields to be entered. If the checkbox is checked, then the address fields are required.

- Parent or Legal Guardian – This section is reserved for the entry of Parent or Legal Guardian information. The Legal Guardian checkbox should be checked if the person entered here is the Legal Guardian of the Pre-ETS Consumer.
- Emergency Contact – This section does not need to be completed unless it is different than the Parent or Legal Guardian information. If the Emergency Contact is the same as the Parent or Legal Guardian information, check the checkbox next to the Emergency Contact label to automatically populate the fields with the same values that were entered into the Parent or Legal Guardian section.

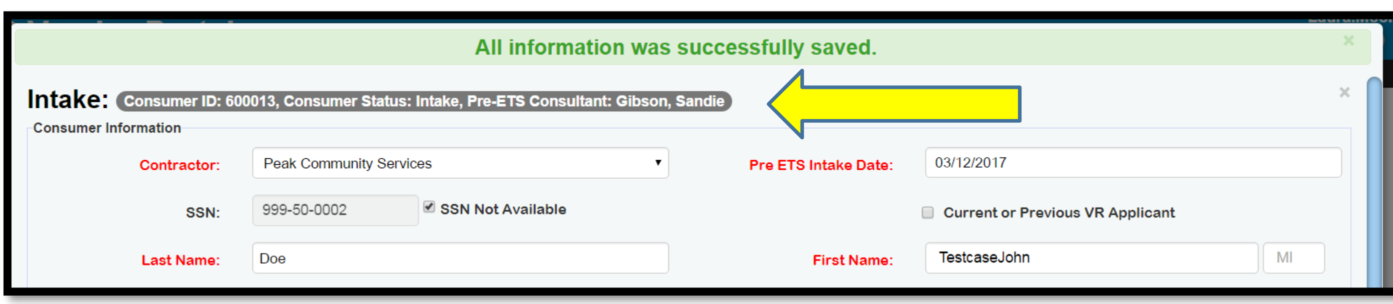
The Reset button will allow the user to clear all entered fields, until the data is saved. After save, the Reset button will be disabled.





After Save, if there are Errors, a message will be displayed at the top of the screen, and the fields in error will show an error message underneath the field.

However, if the Save is successful, a successful save message will be displayed at the top of the screen, and the Consumer ID (unique number), Consumer Status (initially, the Consumer Status is Intake) and the Consultant (i.e., case owner) will be assigned. The current values will be displayed at the top of the Intake Screen and will display each time the Intake is viewed. The Consumer ID, Consumer Status and assigned Consultant are display-only values that are assigned by the system.



Services

Service Search

The Services function launches a Services Search screen. From this screen, the user can either look for a particular Service Session and select it to View or Modify, or the user can create a New Service session record.

Type of Search

There are six (6) types of searches: Consumer ID, Consumer Name, School, Session ID, County and DWD Region. Note: DWD Region is available only when Contractor is set to All or SOI DWD and is relevant only to SOI DWD services. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

Consumer ID is the unique Pre-ETS consumer number that is assigned to the consumer's case at the time of intake. Searching by Consumer ID will result in a list of all service sessions (individual and group) in which the consumer participated.

For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.

Example: Smith,John or Smith,J).

If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.

Like the Consumer ID search, the consumer name search will result in a list of all service sessions (individual and group) in which a consumer (with a matching full or partial name) participated.

The School drop-down will present a full list of the schools covered under the Pre-ETS Contracts. This drop-down will list only the schools covered by the selected Contractor. The School search will result in a list of all service sessions for consumers associated with that particular school (as specified on the Intake screen for consumers).

The Session ID will not present a drop-down. Like Consumer ID, the specific Services Session ID must be entered. This is a numeric field. Searching by Session ID will result in a list of service sessions by client. For group sessions, multiple rows (one per client) will be listed.

The County drop-down represents the consumer's Residential County as shown on the Intake screen.

The DWD Region drop-down list will only be available when Contractor is set to All or SOI DWD and will list the DWD Region numbers (i.e., 1 through 12). The search results will only include a value for the DWD Region field on SOI DWD services.

Additional Search Criteria

Additional / multiple filters can be applied: Service Status, Contractor, Agency, Service Consultant, Date Range (Date From, Date To), and Service Category and Service Type.

Service Consultant represents the consultant who provided the service. The more specific the search criteria, the fewer results that will be displayed.

The Service Status values include:

- All

- In-Process (In-Process means the Service Session has been added, but has not yet been invoiced and is thus still updatable)
- Invoiced (Invoiced means that the Service Session has been included on a monthly Invoice which has not yet been paid)
- Paid (Paid means that the Service Session was included on a monthly invoice which has been paid)

The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.

The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.

The Pre-ETS Consultant drop-down will display a list of names of Contract Leads, Agency Leads and Pre-ETS Consultants based on the user's security and/or limited by the selected Contractor/Agency.

The Date From and Date To fields can be used to specify a date range for the search. If not entered, the Date To field will default to the current date.

The Service Categories search field allows the user to search for all Service Sessions which included a specific service category. The categories include:

- All
- Job Exploration Counseling
- Work-based Learning Experiences
- Workplace Readiness
- Instruction in Self-Advocacy
- Counseling on Opportunities for Enrollment in Post-Secondary Education

Service Type includes:

- All
- Direct Service
- Indirect Service (i.e., student is not present, such as lesson plan preparaton or student portfolio review)

If a Search field is not used, then it will default to all that are available per the user's security clearance.

The Search button will display all results matching the criteria in the results grid.

Results Grid

Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

Some fields will display in the Service Search results conditionally, based on the contractor. For example, Model Service ID and DWD Region will display only when the Contractor search criterion has been set to All or SOI DWD, and when a DWD Region is selected the results will contain values only for the specified SOI DWD region's services.

Export to Excel

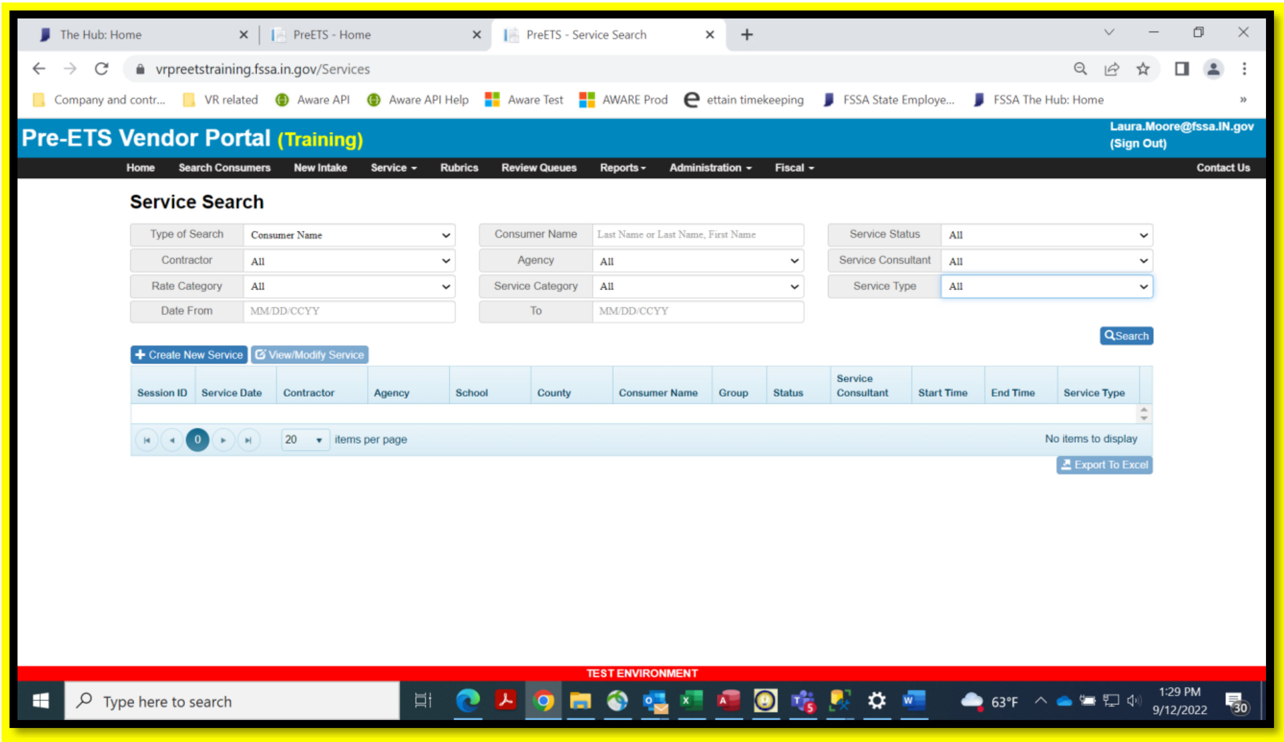
All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII. Please be aware that for Group Sessions, the Service Search results will list a row for each consumer in attendance.

Available Functions

When a consumer record is selected in the grid, available functions include: Create New Service, View/Modify Service. If no service records exist for the consumer, the View/Modify button will be disabled.

If the desired Service Session record is not found in the results grid, a Create New Service function is available and can be used to enter a new consumer service session record.

Alternatively, the user can View/Modify a particular Service Session by double-clicking the desired Service Session in the results grid or selecting the desired Service Session and clicking the View/Modify button. Only one Service Session at a time can be selected for View/Modify.



Service Session

The Service Session screen allows users to add a New Service Session or View/Modify or Delete an existing session. Users will only be allowed to modify a service session up to the point it has been invoiced. Once the service session is invoiced, it is no longer modifiable, nor can it be deleted.

Pre-ETS Consultants, Agency Leads, Contract Leads and VR Pre-ETS Administrators all have the authority to enter, modify and delete un-invoiced service sessions per their access rights. The Delete function is to be used to correct mistakes such as accidentally entering a duplicate service session record.

The Service Session is designed to record information about the actual services that were provided after the services have been provided. It is not used to record planned services before they occur. The Service Session is used to record services that occurred on a specific date.

Service Sessions cannot be entered prior to the pre-requisite Disability Documentation upload and Completed Intake Rubric page (or the upload of both documents prior to 10-01-2021) and as of 8-1-2022, Submitted Recommended Services (for VR review).

When adding a new service session, the Session Date will *not* default to the current date and must be manually entered. The date can be backdated, but it cannot be prior to the Intake Date nor can it be entered as a future date. Also, the Session Date cannot be after the case End Date for any of the selected Consumers (i.e., the case inactivation date).

The Service Session must specify at least one service and at least one consumer. The Service Session Date must be entered prior to adding services or consumers. The Service Session screen can be used to record an individual (one consumer) –or- a group (multiple consumers) service session.

The Service Session must specify a Start Time and End Time. This represents the start and end time for the entire session and can be used for provider time reporting. These fields are included in the search results grid. Note: The time spent by service category is still required for federal reporting purposes.

Indirect Service is an optional checkbox which applies to all services in the session. The default for Indirect Service is 'off'. The field can be retroactively updated on In-Process services, but cannot be updated on Invoiced or Paid services.

If services were provided to an individual separately, not in a group session, a separate service session must be entered for that consumer. If a consumer received multiple services on the same date, the individual service session can record all services for that date and specify a block of start/end time that represents the total aggregate minutes for the day.

For group sessions, all services entered will apply to all consumers entered in the service session. Again, the service session can have only one date, which is the date that the group session occurred. The assumption is that all consumers in the group session received the same services. Therefore, all services entered for the session will apply to all consumers entered for the session. If this is not the case, and a particular consumer received additional or different services than other consumers in the group session, then an individual session must be entered for that particular consumer for all services that differed from the rest of the group.

For a new service session:

The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.

The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.

For agencies serving under more than one Contractor, it is important to select the appropriate Contractor/Agency combination.

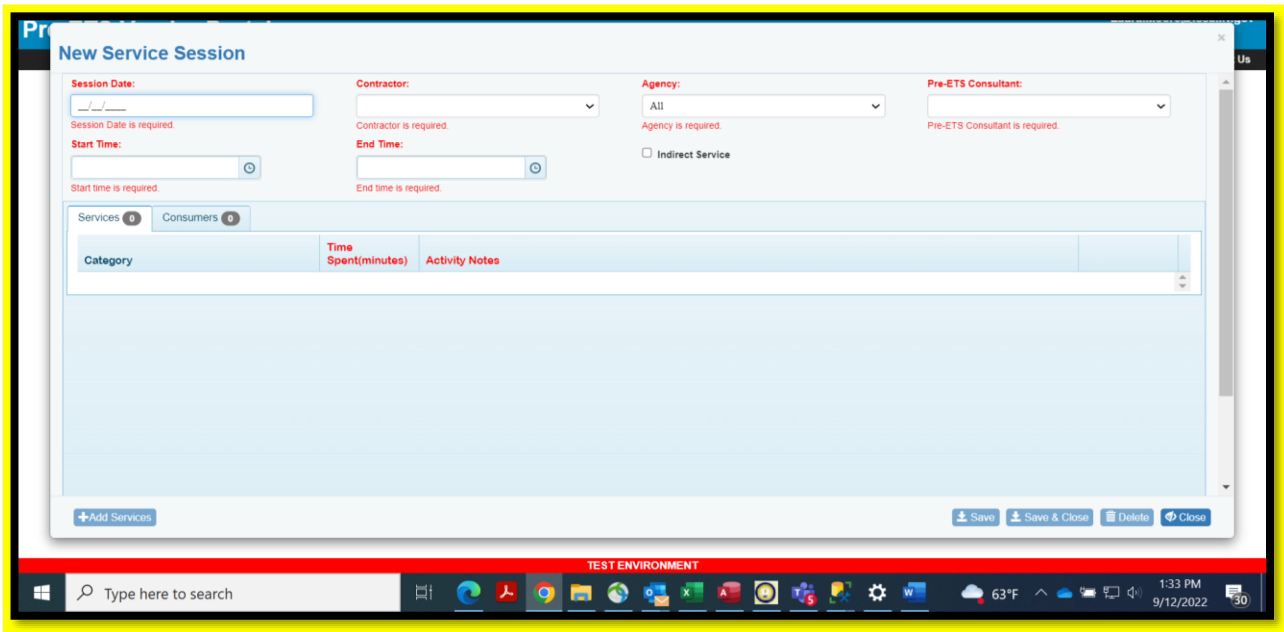
A service session can have only one Contractor/Agency combination. This is to allow the service to be associated with the Agency that provided the service.

The Pre-ETS Consultant field will default to the person entering the service but allows selection of all active users within the specified Contractor/Agency. Note: The Pre-ETS Consultant field should represent the person who directly provided the service. When the service information is entered by office personnel on behalf of the consultants, this field should always be changed to reflect the person who directly provided the service. If that person is not available in the drop-down list, they may need to be added for the Contractor/Agency under the Administration/Manager Users (a valid email address will be required).

Consultants who are marked inactive in the system will be unavailable for selection/display in the Pre-ETS Consultant drop-down list.

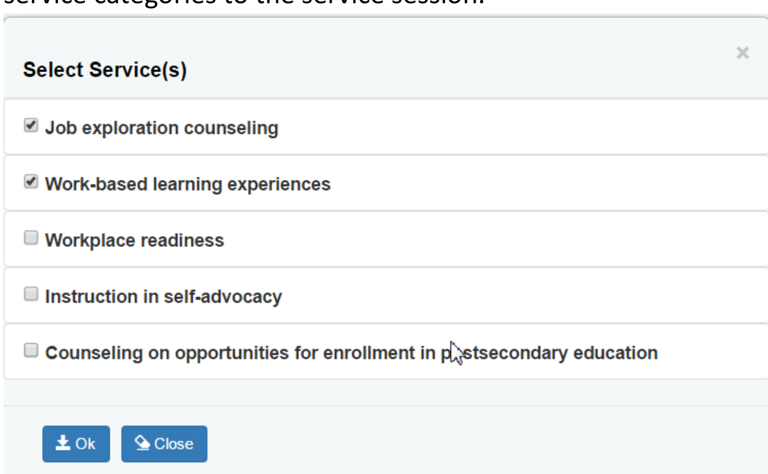
There are two tabs on the Service Session screen: Services and Consumers. The number of services and the number of consumers in the service session will be displayed on the tab. For a brand new service session, these counts will be zero (0) until services and consumers have been added.

Services and consumers can be added in either order, and the user can toggle back and forth between tabs as needed.



Services

The Add Services button can be used to select the service categories that were provided in the service session. When first launched, a list of the five service categories will be presented. Multiple service categories can be selected by checking each desired service category checkbox. Click OK to add the service categories to the service session.



As services are added, if the calculated total time of the services entered does not match the calculated duration of the start/end time, a warning message will appear. This will not prevent new entries and will not prevent saving the service session. Additional services can be added as needed. If the warning persists after all services have been entered, determine what is incorrect (the start/end times or the total time of a specific service) and adjust as needed.

After service categories have been added, if the user returns to the Add Service screen, only the remaining unselected service categories will be listed for selection.

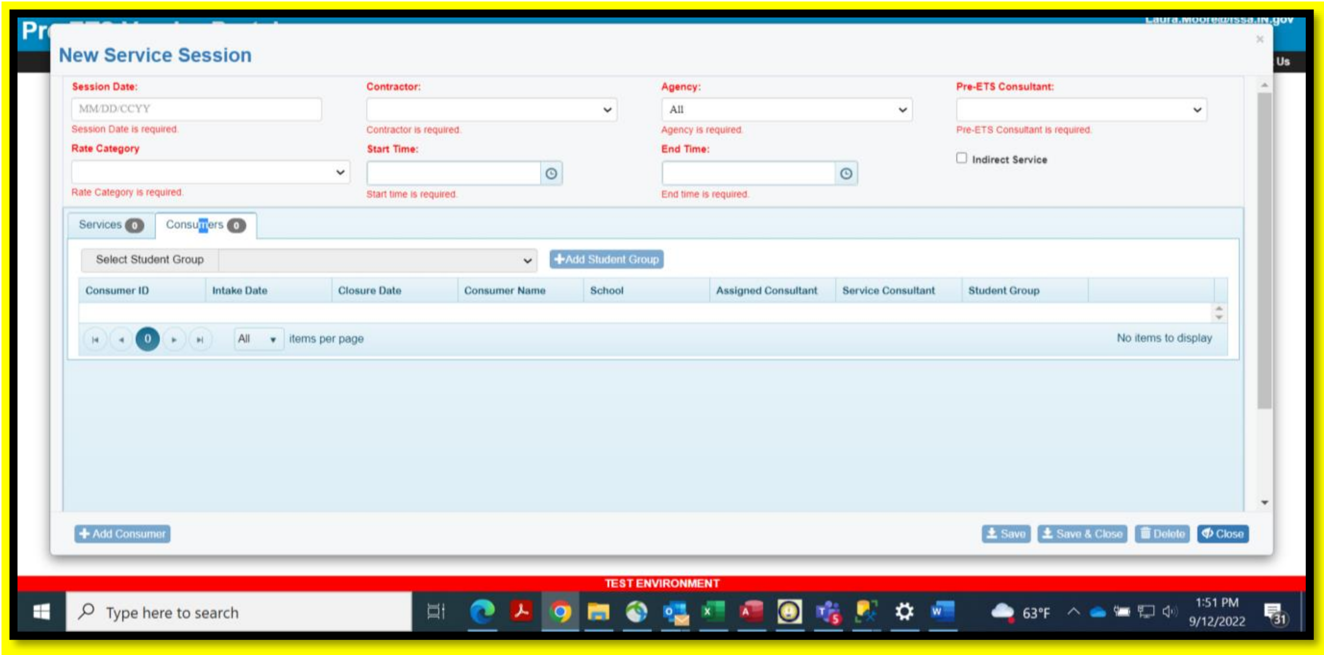
Each service category requires the entry of Time Spent (in minutes) and a description of the Activities performed per category per session. The Activity Notes will automatically 'wrap text' per the width of the Activity Notes column in the grid.

Services can be removed by using the Remove button. This can be used if a service was entered in error. A warning message will be issued to make sure the user really intends to remove the line. s

Consumers

Select Student Group can be used to select a student group for a group session. This is useful when the same group of students generally attend the group sessions at a school.

- First select the desired student group from the drop-down list.
- Select the Add Student Group button.
- A list of all of the students in the student group will appear.
- Any errors associated with a specific student will be displayed (with color coding) at the top of the page with details about the error and it will include the client ID. The student's row will be highlighted with the same color as the error message, and the student row will also show the client ID. This includes all client-related errors, including: missing documentation, service date > expected graduation date, client has aged out of program, overlapping session date/time for a consumer (i.e., Duplicate session).
- On each student row, there is a Remove button at the far right end of the row. This allows the career coach to remove a student from the group session if they are not in attendance on that day.
- If a Student Group has not yet been created, or an additional student is in attendance, or it is an Individual Session rather than a Group Session, the +Add Consumer button is available.
    - Add Consumer will allow individual search and selection of specific consumers for the session. This can be used in lieu of selecting a student group, or extra students who were in attendance that day can be selected in addition to the selected student group.
    - Add Consumer will also allow student group selection, which functions exactly as described above on the Service Session Consumer tab.
- The Add Consumer button will launch a Select Consumer(s) page.



Select Consumer(s)

The Select Consumer(s) page allows the user to search for and select the consumer(s) that participated in the service session or a student group can be selected.

Only consumers for the selected Contractor will be available for selection.

Note: For Contractor Leads who are adding services, when a consumer is 'shared' across agencies within the contract and the Consumers tab is used to select consumer cases *without* limiting the Agency selection criteria, the Primary and Secondary case assignments will show up in the selection list. Please take care to select the appropriate Agency within the contract when adding services. The system will disallow a 'duplicate' selection of the same consumer with different case assignments (Primary and Secondary assignments).

Two Search criteria can be entered: Type of Search and School.

The Type of Search drop-down includes Consumer ID and Consumer Name. Consumer ID is the most specific method for consumer search. For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When the First Name is used, Last Name and First Name should be separated by a comma.

- Example: Smith,John or Smith,J).
- If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.

- Like the Consumer ID search, the Consumer Name search will result in a list of all service sessions (individual and group) in which a consumer (with a matching full or partial name) participated.

The Schools drop-down will present a list of the schools covered by the selected Contractor. The Schools search will result in a list of all consumers associated with the selected school.

Results Grid

Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

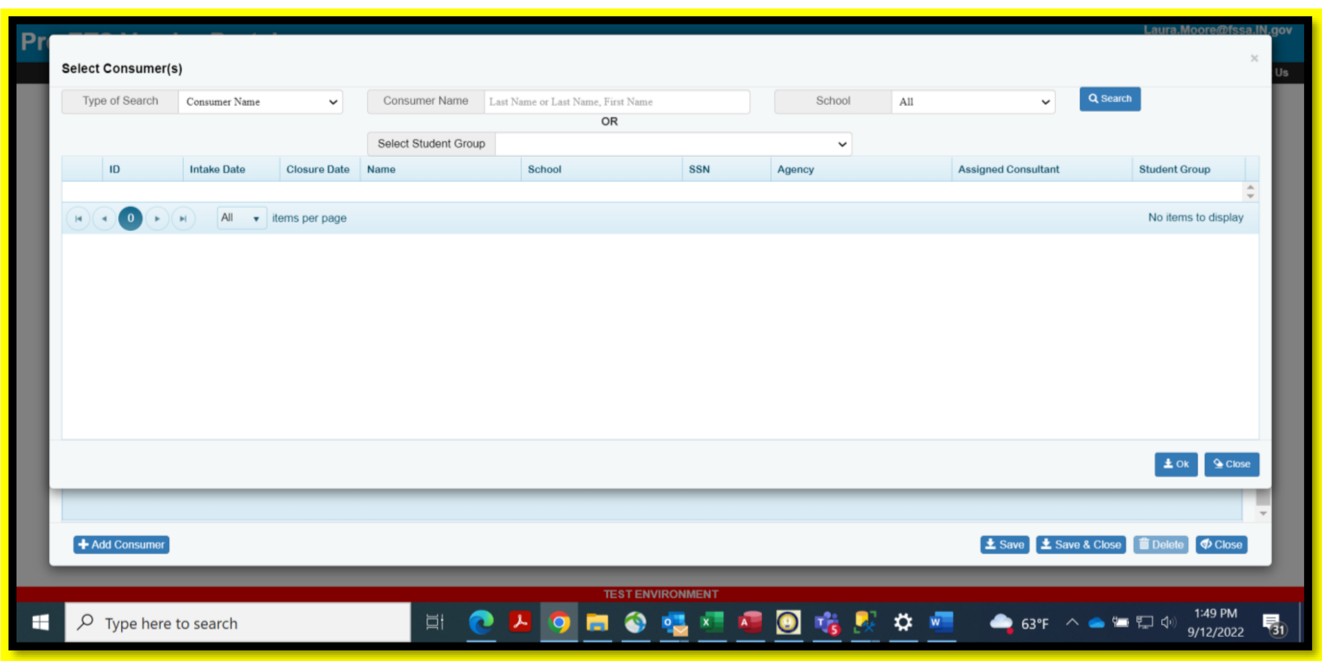
Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

The consumers that participated in the session can be selected by checking the checkbox in the first column. Multiple consumers can be selected if they are from the same Agency.

Click OK to add the consumer(s) to the service session.



Only the last four (4) digits of the SSN are displayed for 'real' SSNs. The last four digits are displayed to help the user to identify a student. However, if a temporary SSN was assigned, the full SSN is displayed to alert the user that the last four digits are not from a 'real' SSN. When a full SSN starting with '999' is displayed, this indicates that the SSN is a temporary SSN.

Once a consumer has been selected, the system will recognize if the user selects consumer(s) from another Agency and will present a warning message that the previously selected consumers will be removed if the user proceeds with this selection.

Consumers that have already been selected will not be displayed if the user returns to the Add Consumer/ Select Consumer(s) screen.

When a consumer is selected for whom the three required types of documentation [the Disability Documentation has not been uploaded and/or the Intake Rubric (Pre-Test)] has not yet been completed and/or Recommended Services have not yet been submitted), an error message will display which will prevent selection of the consumer for service entry. Other consumers that pass this edit can be selected for the Service Session.

When a consumer is selected who has an intake date after the Service Session Date, an error will occur. The user must decide if the Service Session Date is in error or if the consumer was selected in error and correct the issue to save the service session.

When a consumer is selected whose case has been inactivated, and the service session date is after the inactivation date, an error message will display that the service date cannot be after the case closure date and that the case needs to be reactivated. When viewing existing services for which this has occurred, the same error message will display. The case closure date is included in the consumer display. A closed/inactivated case must be reopened to enter services.

When a consumer is selected with service session date greater than or equal to the consumer's 23rd birthday, an error message will display that disallows the Save or Save Close. The consumer must be removed from the service session list as consumers are no longer eligible for services after 23 years of age.

A warning message will display when a service session date's year is greater than the expected graduation date year. The highest year from the Intake and/or Post-Secondary Education Level records will be used for this warning. The Save or Save Close will still be allowed, but the warning is to alert the user that the consumer is no longer eligible for services when they are no longer a student. The expected graduation date may need to be adjusted on the Intake screen if the consumer is continuing education, but this should be reviewed/updated as needed as otherwise the service may be disallowed.

An error will occur when duplicate records are detected upon Save or Save Close. This is based on an existing service session record for the same client, same date and overlapping or identical start and end times. The error will prevent Save or Save & Close until the client records that incurred the error are removed from the session. Information regarding every client record that incurred the error will be displayed at the top of the Service Session screen to facilitate investigation and resolution. The information will include info on the existing service sessions for clients with overlapping time frames.

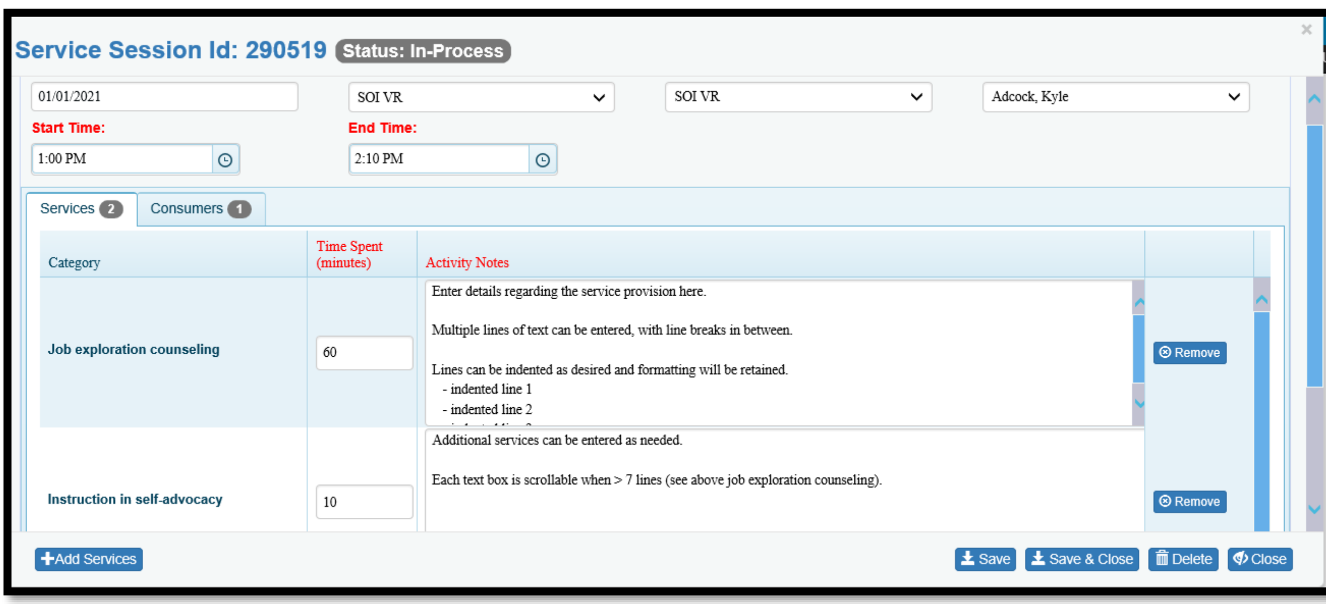
Note: Indirect Services are not considered when checking for 'duplicate' date/time sessions for the same client.

An error will occur when a case is in Interrupted Services status. This status means that VR has stopped further services due to critical issues that need to be addressed. These issues will be documented on the VR Comments on the Recommended Services tab of the Intake Rubric, which can also be launched on the Review Queue (search for cases in Interrupted Services status).

- New services for the student cannot be entered while the case is in Interrupted Services status.
- Note: Effective August 1, 2022, Recommended Services must be Submitted for cases in Intake Status in order to proceed with new services. This is in addition to the requirement for uploaded Disability Documentation and a Completed Intake Rubric.

Once a service session is successfully saved, the Service Session ID and Status will be displayed at the top of the screen. These are system-assigned display only values. The initial value for the service status is In-Process until the service is later Invoiced and then Paid.

For service sessions that were Invoiced using the Vendor Portal Fiscal/Generate Invoice functionality, the portal Invoice# will display next to Status: Invoiced.



Stipends

Stipend Search

The Stipends function launches a Stipend Search screen. From this screen, the user can either look for a particular Stipend Session and select it to View or Modify, or the user can create a New Stipend session record.

Stipends cannot be entered for sessions dated prior to 10/01/2021.

Type of Search

There are six (6) types of searches: Consumer ID, Consumer Name, School, Session ID, County and DWD Region. Note: DWD Region is available only when Contractor is set to All or SOI DWD and is relevant only to SOI DWD stipends. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

Consumer ID is the unique Pre-ETS consumer number that is assigned to the consumer's case at the time of intake. Searching by Consumer ID will result in a list of all stipend sessions in which the consumer participated.

For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.

Example: Smith,John or Smith,J).

If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.

Like the Consumer ID search, the Consumer Name search will result in a list of all stipend sessions) in which a consumer (with a matching full or partial name) participated.

The School drop-down will present a full list of the schools covered under the Pre-ETS Contracts. This drop-down will list only the schools covered by the selected Contractor. The School search will result in a list of all stipend sessions for consumers associated with that particular school as specified on the consumers' Intake record).

The Session ID will not present a drop-down. Like Consumer ID, the specific Stipend Session ID must be entered. This is a numeric field. Searching by Session ID will result in a display of the specified stipend session (if it exists). There are no group sessions for stipends, so only one client will be listed.

The County drop-down represents the consumer's Residential County as shown on the Intake screen.

The DWD Region drop-down list will only be available when Contractor is set to All or SOI DWD and will list the DWD Region numbers (i.e., 1 through 12). The search results will only include a value for the DWD Region field on SOI DWD stipends.

Additional Search Criteria

Additional / multiple filters can be applied: Service Status, Contractor, Agency, Service Consultant, Date Range (Date From, Date To). Service Category will default to Work Based Learning Stipend; that is the only stipend category. The more specific the search criteria, the fewer results that will be displayed.

Stipend status values are the same as Service status values. The Service Status values include the following:

- In-Process (In-Process means the Stipend Session has been added, but has not yet been invoiced and is thus still updatable)
- Invoiced (Invoiced means that the Stipend Session has been included on a monthly Invoice which has not yet been paid)

- Paid (Paid means that the Stipend Session was included on a monthly invoice which has been paid)

The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.

The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.

The Pre-ETS Consultant drop-down will display a list of names of Contract Leads, Agency Leads and Pre-ETS Consultants based on the user's security and/or limited by the selected Contractor/Agency.

The Date From and Date To fields can be used to specify a date range for the search. If not entered, the Date To field will default to the current date.

If a Search field is not used, then it will default to all that are available per the user's security clearance.

The Search button will display all results matching the criteria in the results grid.

Results Grid

Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

Some fields will display in the Stipend Search results conditionally, based on the contractor. For example, Model Service ID and DWD Region will display only when the Contractor search criterion has been set to All or SOI DWD, and when a DWD Region is selected the results will contain values only for the specified SOI DWD region's services.

Export to Excel

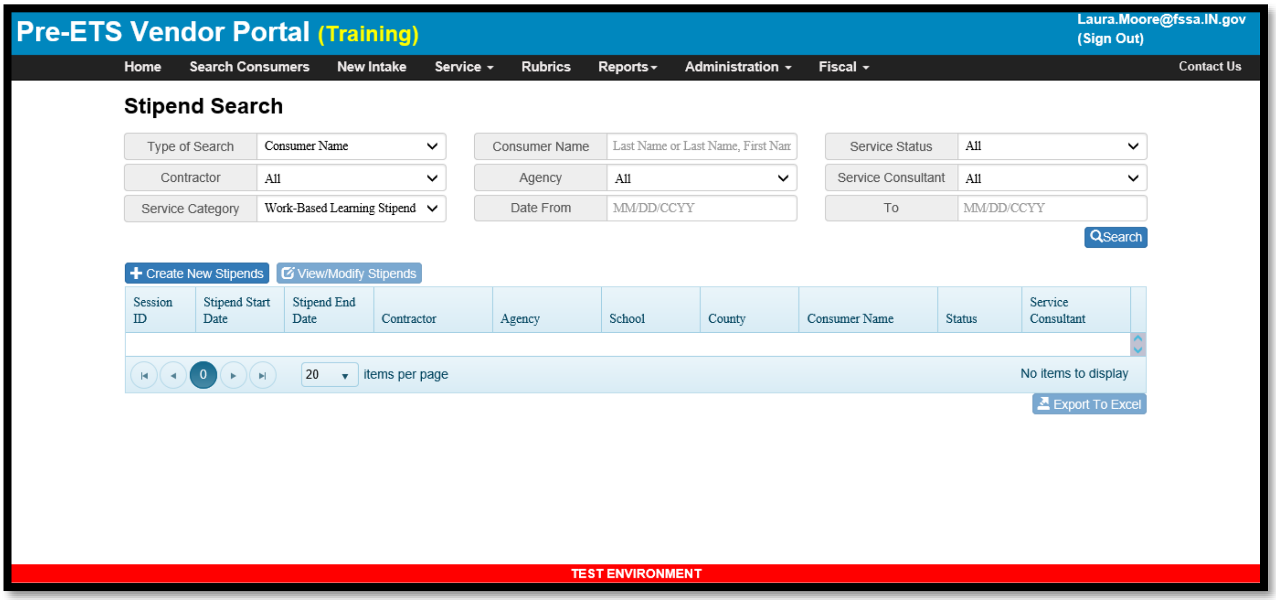
All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII.

Available Functions

When a consumer record is selected in the grid, available functions include: Create New Stipend, View/Modify Service. If no service records exist for the consumer, the View/Modify button will be disabled.

If the desired Stipend Session record is not found in the results grid, a Create New Stipend function is available and can be used to enter a new consumer stipend record.

Alternatively, the user can View/Modify a particular Stipend Session by double-clicking the desired Stipend Session in the results grid or selecting the desired Service Session and clicking the View/Modify button. Only one Stipend Session at a time can be selected for View/Modify.



Stipend Session

The Stipend Session screen allows users to add a New Stipend Session or View/Modify or Delete an existing session. Users will only be allowed to modify a stipend session up to the point it has been invoiced or paid. Once the stipend session is invoiced or paid, it is no longer modifiable nor can it be deleted.

Pre-ETS Consultants, Agency Leads, Contract Leads and VR Pre-ETS Administrators all have the authority to enter and modify and delete un-invoiced stipend sessions per their access rights. The Delete function is to be used to correct mistakes such as accidentally entering a duplicate service session record.

The Stipend Session is designed to record information about a work-based learning stipend period after it has occurred. It is not used to record planned future stipend sessions. The Stipend Session can be used to record services that occurred during in a specific date range, but the date range must be within same month/year. It is not limited to a single day session or to specific start/end times as with services.

Stipend Sessions cannot be entered prior to the pre-requisite Disability Documentation upload and a Completed Intake Rubric page (or upload of both documents prior to 10-01-2021).

When adding a new stipend session, the Session Dates will *not* default and must be entered. The date can be backdated, but it cannot be prior to the Intake Date nor can it be entered as a future date. Also, the Session Date cannot be after the case End Date for the selected Consumers (i.e., the case inactivation date). The date range must be within the same month/year.

Stipends cannot be entered for dates prior to 10/01/2021.

The Stipend Session does not have separate tabs. Stipends have only one service category, Work-Based Learning Stipend (which is the default) and can specify only one consumer. Group sessions are not allowed for stipends. Note: If a New Stipend Session is launched from Consumer Search, the consumer will default to the student selected on the Consumer Search screen.

For a new stipend session:

- The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.
- The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.
- For agencies serving under more than one Contractor, it is important to select the appropriate Contractor/Agency combination.
- A stipend session can have only one Contractor/Agency combination.
- The Pre-ETS Consultant field will default to the person entering the stipend but allows selection of all active users within the specified Contractor/Agency. Note: The Pre-ETS Consultant field should represent the consultant who coordinated/communicated with the employer and would typically be the consultant assigned to the case. When the service information is entered by office personnel on behalf of the consultants, this field should be changed to reflect the person directly involved. If that person is not available in the drop-down list, they may need to be added for the Contractor/Agency under the Administration/Manager Users (a valid email address will be required).
    - Consultants who are marked inactive in the system will be unavailable for selection/display in the Pre-ETS Consultant drop-down list.

There are no tabs on the Stipend Session screen. The stipend information is entered in the fields at the top of the page, and there is an Add Consumer button to select a consumer (if not already auto-selected when launched from Consumer Search). A consumer cannot be added until Session Start Date and End Date have been entered and Contractor is entered.

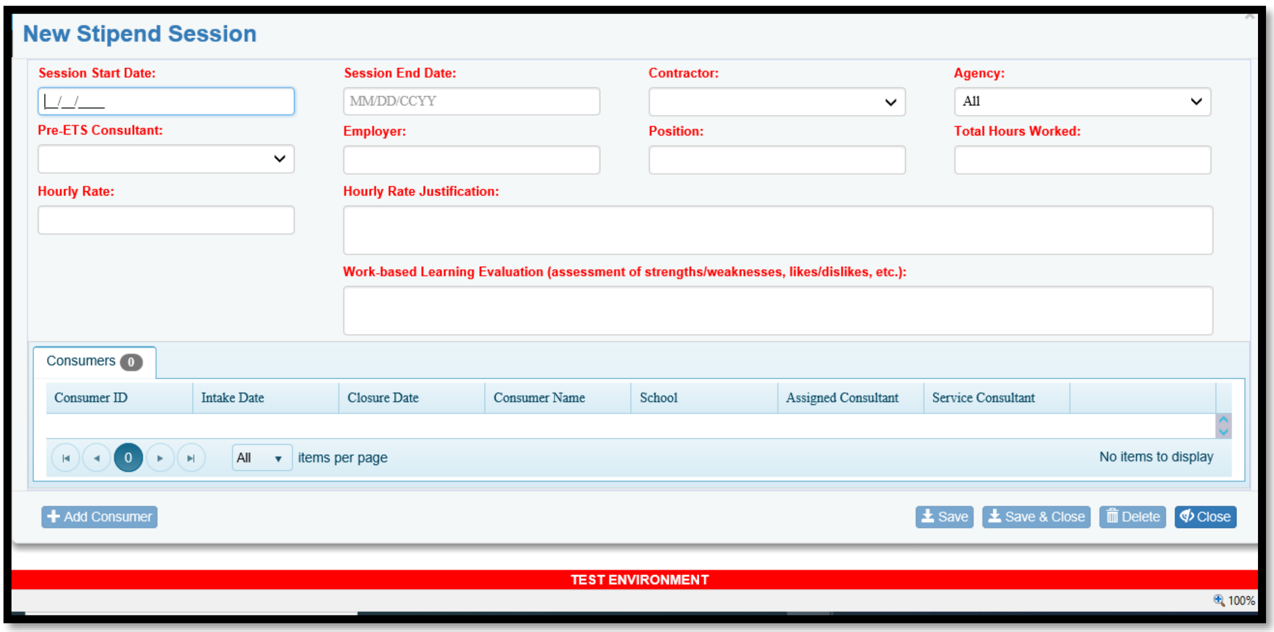
All Stipend Session fields are required: Session Start Date, Session End Date, Contractor, Agency, Pre-ETS Consultant, Employer, Position, Total Hours Worked, Hourly Rate, Hourly Rate Justification and Work-Based Learning Evaluation. This stipend session information applies to the entire date range, and only one Hourly Rate can be specified. Therefore, if the student worked at more than one job at different rates, then these would need to be entered as separate stipend sessions. If the jobs were at the same rate, one session can be used but this would need to be clarified in the Position and Hourly Rate Justification fields.

No more than 9 hours can be specified per day for the Total Hours during the date range. Hourly Rate cannot be less than the current Indiana minimum wage.

Only one consumer can be specified on the stipend session. Edits will prevent entry of more than one consumer.

Upon successful save, the Stipend Session ID will display at the top of the page.

The Add Consumer button can be used to select the consumers that participated in the service session. The Add Consumer button will launch a Select Consumer(s) page.



Select Consumer

The Select Consumer page allows the user to search for and select the consumer(s) that participated. It functions in the same manner as Select Consumer for service sessions except that only one consumer can be selected for a stipend session.

The consumer that participated can be selected by checking the checkbox in the first column.

Click OK to add the consumer to the stipend session.

Stipends cannot be created for a consumer whose case is in Intake status unless the prerequisite Disability Documentation document is uploaded and a Completed Intake Rubric page (or both documents were uploaded prior to 10-01-2021).

Student Groups

This function will allow student groups to be added/modified for easy consumer selection for group service sessions. This is useful when the same students are frequently in attendance at a school's group sessions.

Student Group Search

The Student Group function launches a Student Group Search screen. From this screen, the user can either look for a particular Student Group and select it to View or Modify, or the user can create a New Student Group.

Type of Search

There are four (4) types of searches: Consumer ID, Consumer Name, School, and County. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

Consumer ID is the unique Pre-ETS consumer number that is assigned to the consumer's case at the time of intake. Searching by Consumer ID will result in a list of all student groups in which the consumer participated.

For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.

Example: Smith,John or Smith,J).

If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.

Like the Consumer ID search, the Consumer Name search will result in a list of all student groups in which a consumer (with a matching full or partial name) is included.

The School drop-down will present a full list of the schools covered under the Pre-ETS Contracts. This drop-down will list only the schools covered by the selected Contractor. The School search will result in a list of all student groups that include consumers associated from that particular school (as specified on the consumers' Intake record).

The County drop-down represents the consumer's Residential County as shown on the Intake screen.

Additional Search Criteria

Additional / multiple filters can be applied: Contractor, Agency, Created By Consultant.

The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.

The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.

The Created By Consultant represents the user who created the student group. If you enter your own student groups for example, use your name in this field to list all student groups that you have created.

The Search button will display all results matching the criteria in the results grid.

Results Grid

Multiple rows may be returned in the results grid, or a message will be returned stating that no results were found.

Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

Export to Excel

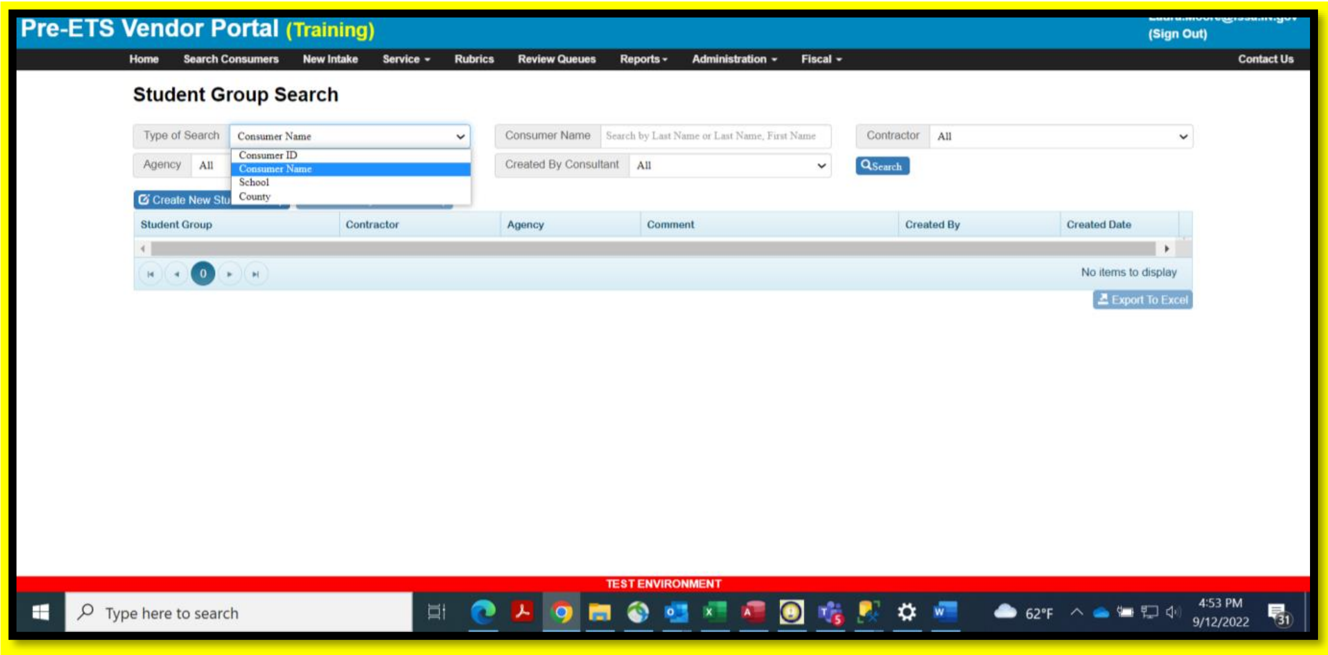
All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed.

Available Functions

Available functions include: Create New Student Group, View/Modify Student Group.

Create New Student Group is always enabled.

View/Modify Student Group is only enabled when an existing student group in the result set has been selected.



Create Student Group

The Create Student Group screen allows users to add a new Student Group.

Pre-ETS Consultants, Agency Leads, Contract Leads and VR Pre-ETS Administrators all have the authority to enter and modify and delete student groups per their access rights.

Search Consumers

The Search Consumers section of the Create Student Group page allows users to select students for inclusion in a Student Group with the student group name of your choice. For example, 'Boone Grove HS Fall 2022'. This student group can later be selected for service sessions, to expedite consumer selection on group sessions.

Select students to add to the student group by using Search Consumer to search by Consumer ID or Name, School, or County along with Contractor/Agency/Pre-ETS Consultant and Consumer Status (which defaults to Active).

Contractor, Agency and Pre-ETS Consultant will default based on the user's access.

- The Contractor drop-down will default to the user's 'home' Contractor group, but if other Contractors are available per the user's access, they will also be available for selection.

- The Agency drop-down will default to the user's 'home' Agency, but if other Agencies are available per the user's access, they will also be available for selection.

- For agencies serving under more than one Contractor, it is important to select the appropriate Contractor/Agency combination.

- The Pre-ETS Consultant field will default to the user, but allows selection of any active user within the specified Contractor/Agency. Note: The Pre-ETS Consultant field for search purposes here represents the consultant assigned to the consumer's case.

- A student group can have only one Contractor/Agency combination. However, students from more than one school can be included in the same student group, just in case students from different schools are participating in group summer sessions.

Click the Search button and lists of consumers that match the criteria will be displayed.

Check the checkbox on the row of each student to be included in the student group, then click on the Add to Student Group button.

When Add to Student Group is selected, all selected students will appear listed under the Student Group header. The number of students in the group is displayed in parantheses next to the Student Group header. The Add to Student Group can be used as many times as necessary until all students have been added to the group.

In addition to naming the Student Group (which is required), an optional Comment field is also available. Both fields are free-form text. The student group name should be meaningful enough to allow easy identification and selection when using the student group for group service sessions.

Student Group

For existing student groups when using View/Modify Student Group, or right after using the Add to Student Group function, additional functions are available in the Student Group section of the page.

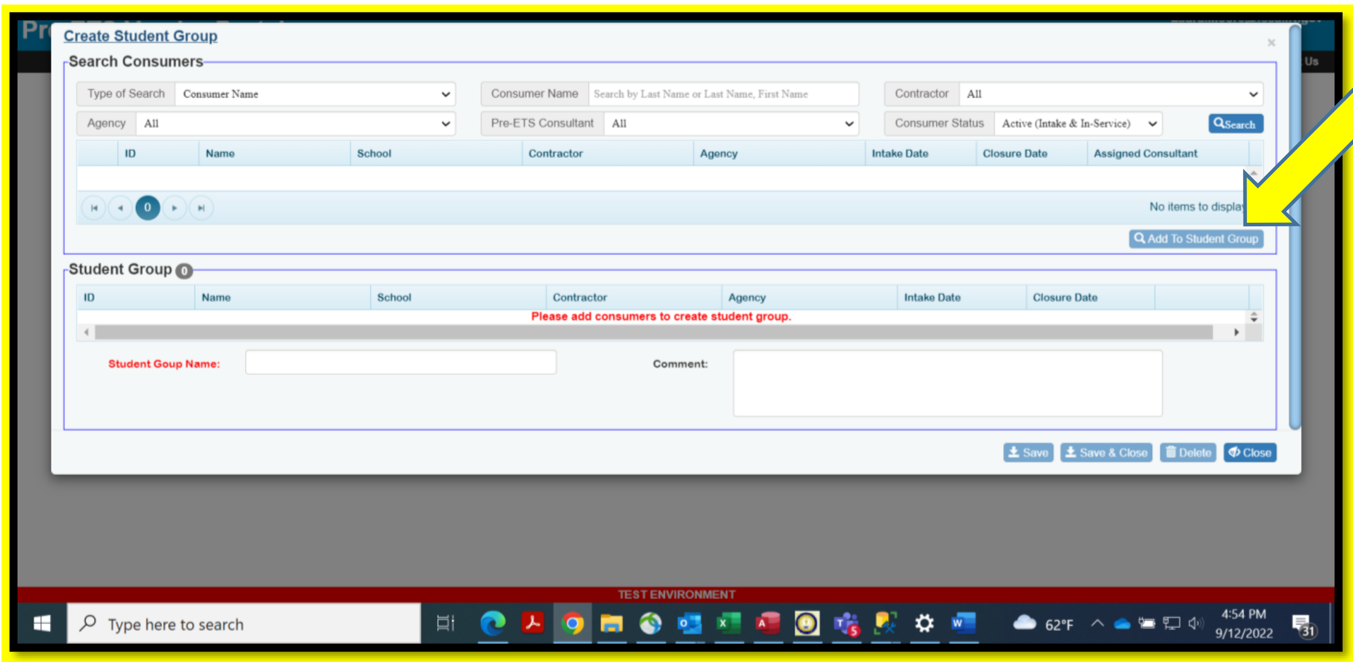
On this page, all students in the Student Group will be listed.

A Remove button is available at the end of each student row if the student will no longer be included in the group sessions or if the student was entered in error. Also, new students can be added to the existing Student Group using the Search Consumer function. After selecting the checkbox of the new student, select the Add to Student Group button.

Additional students can be added to the student group as needed, using the Search Consumers/Add to Student Group function.

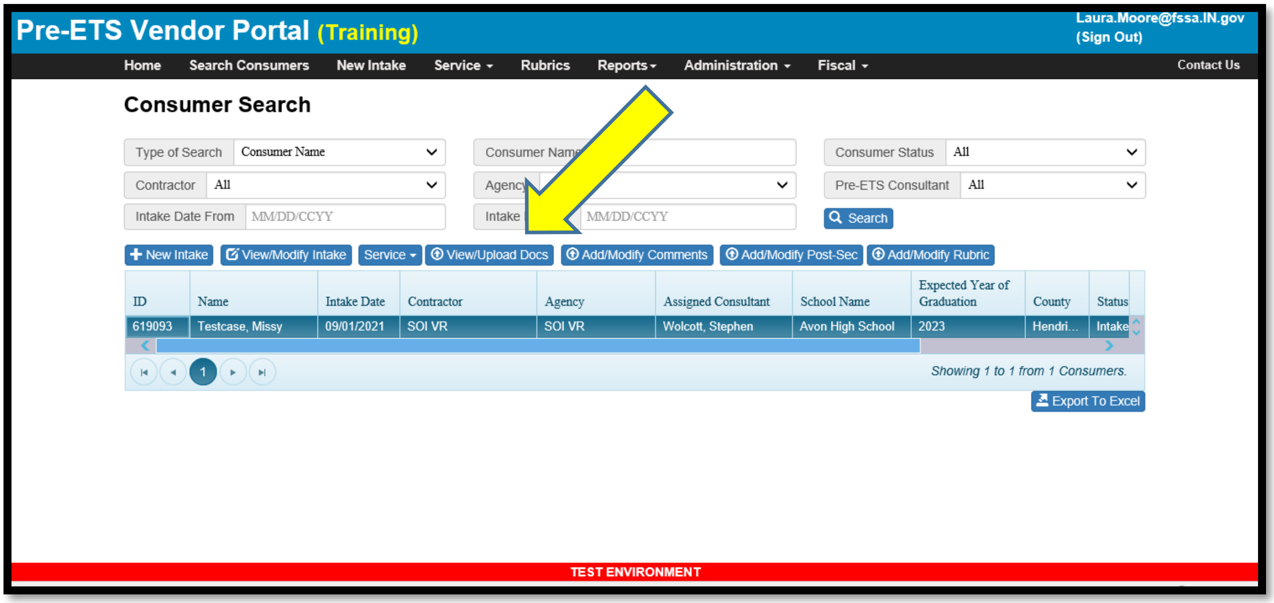
If the Student Group was entered in error or is a duplicate, a Delete button is available to delete the *entire* Student Group. This function should be used with caution!

If the Student Group changes, was misspelled, or is now obsolete but the user would like to retain the Student Group for reference purposes, it can be renamed. For example, if the students are largely the same with minor changes, the group could be updated and renamed to Boone Grove HS Spring 2023, or if the group is to be retained but is now obsolete, it could be renamed to Boone Grove HS Fall 2022 Do Not Use.



Documents

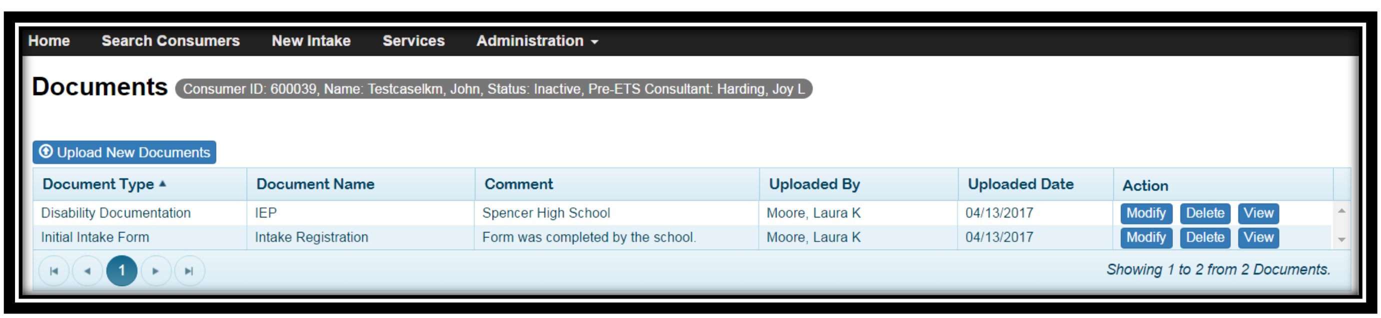
This function will allow users to upload documents to attach to a Pre-ETS consumer's case. Because the documents are case-specific, this function is launched from the Consumer Search screen. Select the desired Consumer and click the View/Upload Documents button.



If a consumer is shared, documents entered by both the Primary and Secondary Contractor/Agencies will be available for View. However, Contractor/Agencies will only be able to Modify/Delete the documents uploaded by *their* Contractor/Agency. Secondary assignments will be designated as such by Secondary in parantheses next to the Assigned Consultant's name on Consumer Search.

Results Grid

A results grid will display the existing documents for the case. As with other grids, the results are sortable by column header.



Available Functions

Users will be able to Modify, Delete or View existing documents or Upload New Documents.

For existing documents, the Modify, Delete and View buttons are in the right-most column in the grid.

- Click Modify to change the Document Type, Document Name, or the Comment for the selected document.
- Click Delete to remove an unwanted document (e.g., a document that was added to the wrong case or to delete a document which is out of date and needs to be replaced).

- Click View to open and view the selected document.

Users will not be able to edit/change the content of documents that have already been uploaded to Pre-ETS.
To update a document, the user should:

- Delete the document from Pre-ETS.
- Modify the document on their workstation and convert the document to PDF.
- Upload the updated PDF to replace the old document.

Special Rules for the Documents Delete function:

Consent for Release Forms cannot be deleted. If you have added a Consent form in error (for example on the wrong case) and need it to be deleted, please contact email Fssa.Pre-Ets@fssa.IN.gov for assistance.

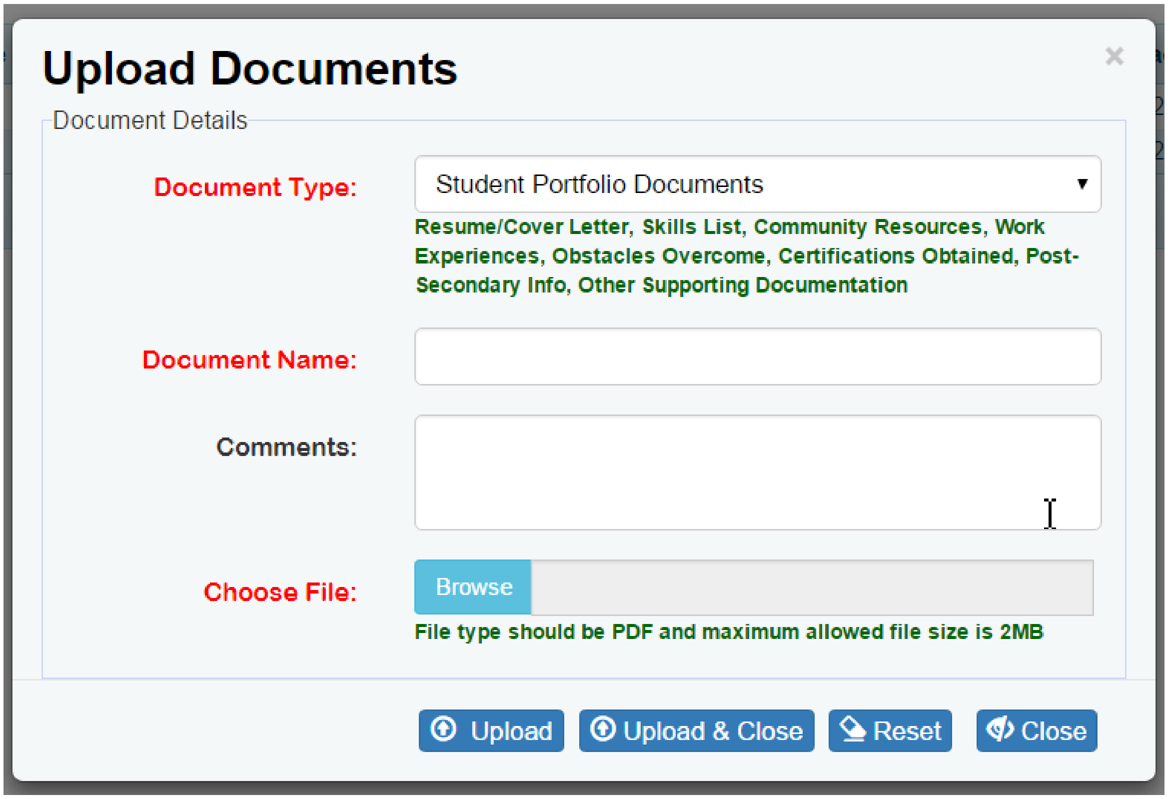
After a case has been inactivated, Documents cannot be deleted. Again, if there are documents that were added in error which need to be deleted, please email Fssa.Pre-Ets@fssa.IN.gov for assistance.

Note: If a document is accidentally deleted, there is a 15 day window in which the document can be restored. Please immediately report the issue with the contract/agency, consumer name, information regarding the document to be restored and the approximate date of document deletion to email address Fssa.Pre-Ets@fssa.IN.gov for assistance.

Upload Documents

To Upload a document, click the Upload New Documents button at the top of the grid on the left-hand side.

The Upload Documents screen will then be presented. Fields in red font are required.



There are only four fields:
Document Type (required to categorize the document).

If a selected Document Type might be used for a variety of specific documents, a list of the documents will display underneath the Document Type field as shown in the screen shot above.

- Document Name (required because this is the how the document name is stored in Pre-ETS).
- Comment (which is optional and can be used to help identify the document or add other useful information).
- Choose File (required to select the document to be uploaded).
- The Browse button is used to navigate on your server(s) to the document that is to be uploaded. The display is the same as using Windows Explorer to select the desired path to a server/folder/document.

Documents are categorized by document types to make it easier to find specific documents associated with the case. The Document Types include:
- Disability Documentation (i.e.: IEP, 504, or Other Disability Documentation)
- Initial Intake Form
- Intake Rubric (Pre-Test)
- Post-Test Rubric
- Consent for Release Forms

- Student Portfolio Documents (i.e., Resume/Cover Letter, Skills List, Community Resources/Employers, Work Experiences, Obstacles Overcome, Certifications Obtained, Post-Secondary Information, or Other Supporting Documentation)
- Stipend Wage Justification (i.e., Document/information showing prevailing wage or intern rates, employer information regarding wage rates, etc.)

Available Functions for Document Upload

There are four action buttons:

- Upload (after completing the required fields, click Upload to upload the document. A successful or error message will display at the top of the screen. The screen will stay open after the action is completed.)
- Upload & Close (this will upload the document and will also close the screen after briefly displaying the successful or error message at the top of the screen).
- Reset (will clear all fields if used prior to an Upload button)
- Close (Close the screen without uploading or after a successful Upload)

Upon clicking an Upload button, behind the scenes a malware/virus scan will be run against the document. A message will display when this process begins.

Document Requirements

The documents must be in PDF format or an error message will display preventing upload. The Browse function will default to document type of Adobe Acrobat Document (i.e., PDF).

The documents cannot exceed 6MB or an error message will display preventing upload.
Note: If you have scanned a document and the size exceeds 6MB even when it is only a few pages long, you may need to adjust the use a lower resolution setting. Sometimes very high resolutions will cause document size to be excessively large.

The document must pass a malware/virus screen to be uploaded or an error message will display preventing upload.

After a case has been inactivated the uploaded Documents are 'locked', meaning that the Delete button will be disabled for all but VR Administrators. Note: If a document needs to be deleted after inactivation, until the reactivate function is available, please email Fssa.Pre-Ets@fssa.IN.gov to request the deletion. Please include contract/agency, consumer name, and information regarding the document to be deleted.

Case Comments

This function will allow users to enter comments associated with a consumer case. Because the comments are case-specific, this function is launched from the Consumer Search screen. Select the desired Consumer and click the Add/Modify Comments button.

If a consumer is shared, comments entered by both the Primary and Secondary Contractor/Agencies will be available for View via the View/Modify button. However, Contractor/Agencies will only be able to Modify/Delete the comments uploaded by *their* Contractor/Agency.

Available Functions

Add/Modify Comment will launch the Case Comment screen. When there are existing comments, they will display in descending order by Case Comment Date (most recent to oldest). If no comments have been entered, the results grid will be empty.

There is a search box which allows for a text string search and the results grid will display any comments that contain the text string. For example, when searching for any comment regarding an evaluation, type eval into the search criteria and all comments containing eval will display in the results grid.

From the Case Comments screen, users will be able to Add Case Comment for new comments or View/Modify or Delete existing comments.

Case Comment Date can be any date after or equal to the Intake Date but cannot be future dated.

View/Modify will present a pop-up of the comment which displays the full content of the comment as well as additional buttons.

- If changes are made to Case Comment Date or Case Comment, the Reset button sets the contents of the fields that have been changed back to the values prior to the change. This does not work after Save or Save Close! This button will remain disabled until a change is made.
- Delete will remove the comment entirely.
- Save or Save Close will save modifications to the comment. These buttons will remain disabled until a change is made.

Results Grid

A results grid will display the existing comments for the case. As with other grids, the results are sortable by column header and the columns can be resized via drop and drag. The comment text will be displayed without line break formatting to maximize the display in the grid. Note: View/Modify will display the full comment with the original formatting, including line breaks.

Export to Excel

All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII.

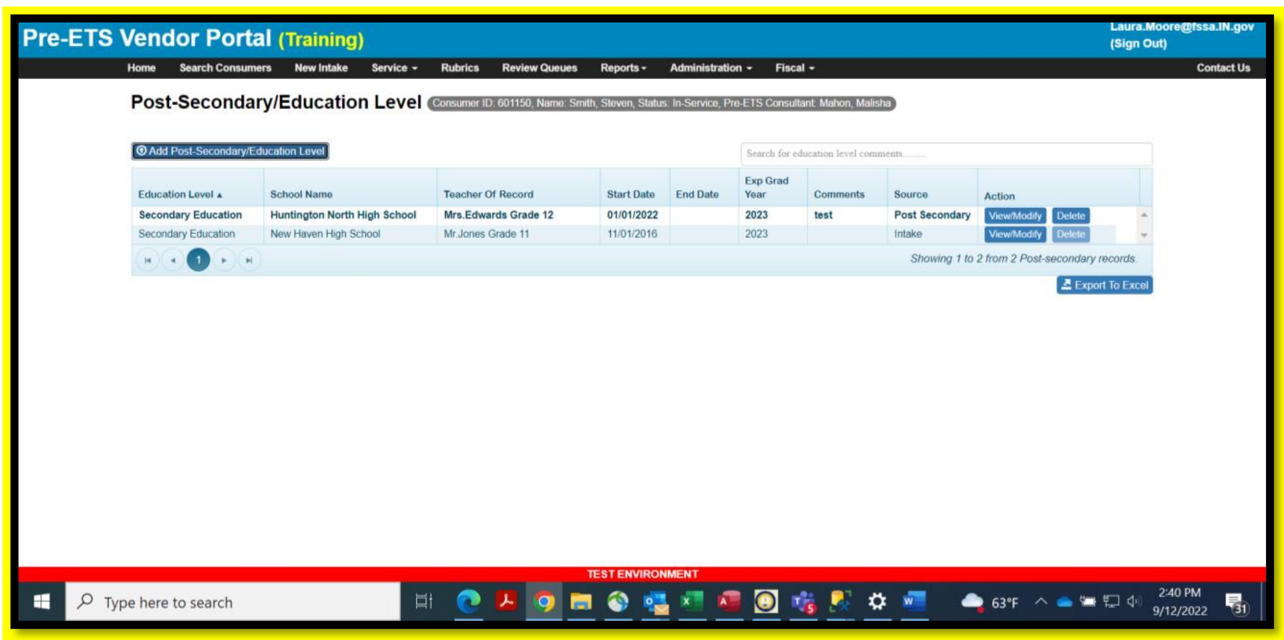
Post-Secondary/Education Level

This function will allow users to enter information associated with a consumer's educational institutions and/or progression to post-secondary education. For example, it can be used to record a new high school (e.g., when a student moves and starts at a new school) and/or any new secondary or post-secondary educational institutions. It allows new schools to be documented *without* altering the original educational information entered at time of intake. It also allows end dates and comments to be recorded for existing post-secondary/educational level records.

Because the education information is case-specific, this function is launched from the Consumer Search screen. Select the desired consumer and click the Add/Modify Post-Secondary button.

If a consumer is shared, post-secondary/education level records entered by both the Primary and Secondary Contractor/Agencies will be available for View via the View/Modify button. However, Contractor/Agencies will only be ab[redacted]aded by *their* Contractor/Agency.

For records with Source = Intake, Teacher of Record will be displayed (if a value was entered on the Intake screen). Teacher of Record is also available for entry of additional Secondary Education records from the Post-Secondary screen, but it is not available to be entered for new first year or higher Post-Secondary records.



Results Grid

A results grid will display the existing post-secondary/education level records for the case. As with other grids, the results are sortable by column header and the columns can be resized via drop and drag. The comment text will be displayed without line break formatting to maximize the display in the grid. However, the View/Modify will display the full comment with the original formatting, including line breaks.

Export to Excel

All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII.

Available Functions

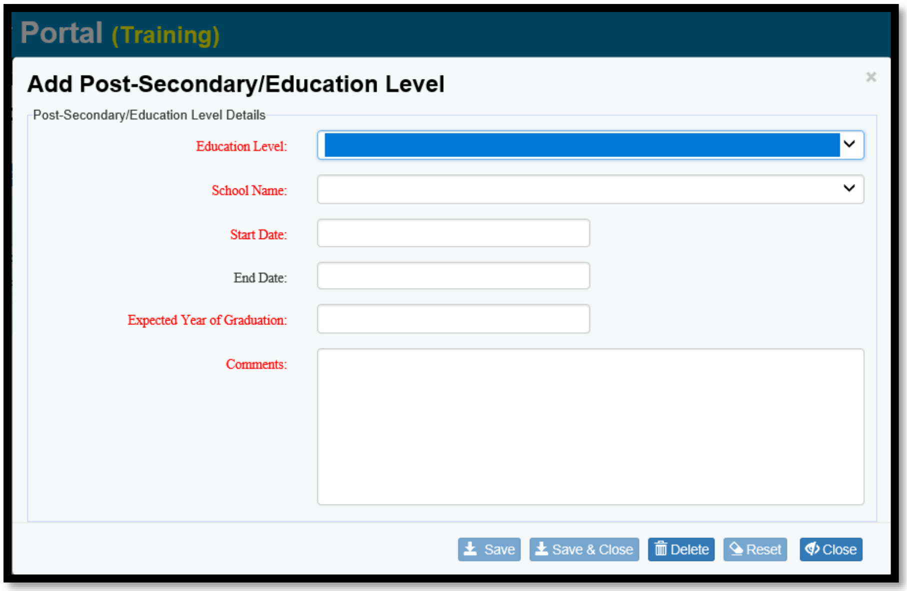
Add/Modify Post-Secondary will launch the Post-Secondary/Education Level screen. When there are existing records, they will display in descending order (most recent to oldest). There should always be at least one record, with Source of Intake.

There is a search box which allows for a text string search and the results grid will display any comments that contain the text string.

From the Post-Secondary/Education Level screen, users will be able to Add Post-Secondary/Education Level or View/Modify or Delete existing records. Note: Records with Source of Intake cannot be deleted (Delete button will be disabled).

Add Post-Secondary/Education Level or View/Modify will present a pop-up of the post-secondary/education level record which displays the full existing content as well as additional buttons.

- Fields derived from the Intake information modifiable. For Intake post-secondary/education level records only the End Date and Comments fields are modifiable. Currently, the Intake record's start date defaults to the intake date.
- If changes are made, the Reset button sets the contents of the fields that have been changed back to the values prior to the change. This does not work after Save or Save Close. This button will remain disabled until a change is made.
- Delete will remove the record entirely. Delete is disabled when Intake is the source.
- Save or Save Close will save modifications to the comment. These buttons will remain disabled until a change is made.
- If a School Name is not found in the drop-down list, the Manage Schools function can be used under the Administration menu.



Rubrics and Measured Skills Gains

This function will allow users to search for, enter, view, or modify Intake and Exit Rubric information. After both the Intake and Exit Rubric are completed, the Measured Skills Gains will be displayed.

The flow of rubric completion is to first complete an Intake Rubric per the pre-test interview, and later upon the consumer's completion of the Pre-ETS program, to complete the Exit Rubric (at which time the Measured Skills Gains can then be automatically calculated and displayed by the portal).

Rubrics / Measured Skills Gains Search

Because the rubrics 'build upon each other' as the case progresses, only one page will be used to display Intake/Exit and Measured Skills Gains.

From this screen, the user can either look for a particular consumer's rubric and select it to View or Modify, or the user can create a New Intake Rubric record.

Users can also search for recommended services for a consumer's rubric, and select it to View or Modify, or the user can create a New Recommended Services record.

Type of Search

There are four (4) types of searches: Consumer ID, Consumer Name, School, and County. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

Consumer ID is the unique Pre-ETS consumer number that is assigned to the consumer's case at the time of intake. Searching by Consumer ID will result in a list of one row with Intake and Exit Rubric statuses displayed or a message for No records found.

For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.

- Example: Smith,John or Smith,J).
- If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.
- Like the Consumer ID search, the Consumer Name search will result in a list of all rubrics for which a consumer name has a full or partial match.

The School drop-down will present a full list of the schools covered under the Pre-ETS Contracts. This drop-down will list only the schools covered by the selected Contractor. The School search will result in a list of all rubrics for consumers associated with that particular school (as specified on the Intake screen for consumers).

The County drop-down represents the consumer's Residential County as shown on the Intake screen.

Additional Search Criteria

Additional / multiple filters can be applied: Consumer Status, Contractor, Agency, Pre-ETS Consultant, Intake Date From, Intake Date To, Narrow Search.

The search criterion 'Narrow Search' can be used to search for *existing* rubrics.

- Narrow Search will specify Intake Rubric, Exit Rubric/MSG or Recommended Services.
- When one of these options is selected a Status drop-down list will appear which pertains to the selected Narrow Search status. Status is an optional additional selection to further narrow the search.
- When Intake Rubric is selected, it will also display Exit Rubric status for the clients with an existing Intake Rubric as well as the Recommended Services status.

Intake Rubric Statuses include: Draft or Completed.

Exit Rubric Statuses include: Draft, Completed or Waived.

- Waived indicates that the Exit Rubric could not be completed by the consultant (e.g., due to the unavailability of consumer to conduct an exit interview).

Recommended Services Statuses include: Draft, Submitted, Approved, Not Approved, Interrupted Services or Interrupted Services Resubmitted.

When *Pending* is displayed for either an Intake or Exit Rubric or Recommended Services status, this means it has not yet been started, i.e. it doesn't exist yet.

As always, the more selection criteria used the smaller the search results will be, and vice versa.

If no rubrics or recommended services exist per all search criteria, a 'No records found' message will display and no buttons will be enabled. (Note: In order to create a rubric, a consumer must be selected).

When Recommended Services do not exist yet, Pending will be displayed in the Recommended Services Status column. To create recommended services, select the student and the Create New Recommended Services button. To modify or view existing recommended services, select the View/Modify Recommended Services button. Alternatively, when the rubric is selected, the user can click on the Recommended Services tab to view the page.

Results Grid

Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

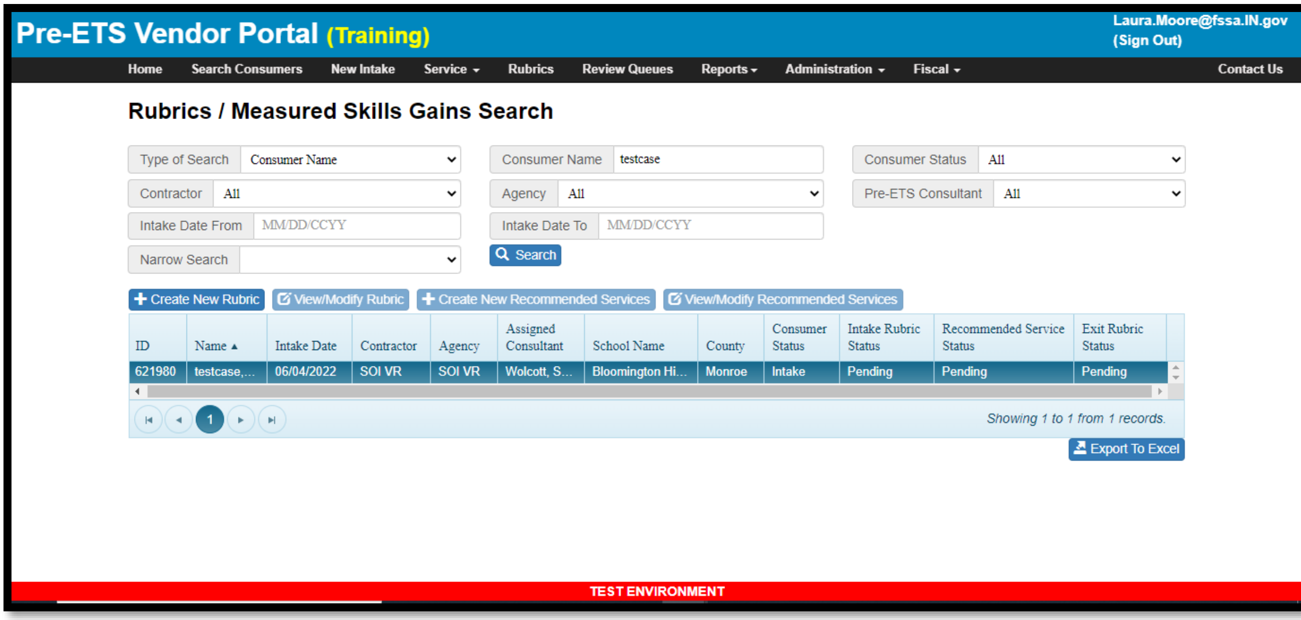
Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

Export to Excel

All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII.



Available Functions

When a consumer record is selected in the grid, available functions include: Create New Rubric, View/Modify Rubric. If no rubric records exist for the consumer, the View/Modify button will be disabled.

Create New Rubric will launch a new Intake Rubric page.

If an Intake Rubric already exists, the View/Modify Rubric button will be enabled. This will launch the existing Rubric page in its current state of completion. The user can View/Modify a particular rubric by double-clicking the rubric in the results grid or selecting it and clicking the View/Modify button. Only one rubric at a time can be selected for View/Modify.

Create New Recommended Services will launch the Recommended Services tab for the selected rubric.

If a Recommended Services page already exists, the View/Modify Recommended Services will launch the existing recommended services tab of the selected rubric.

If the desired rubric record is not found in the results grid, the Create New Rubric function is available and can be used to enter a new Intake Rubric.

Intake / Exit Rubric

The rubric page allows users to add a new Intake or Exit Rubric or View/Modify or Delete an existing rubric prior to Exit Rubric completion.

The same page is used for the Intake and Exit Rubric and the Measured Skills Gains Display. After the Exit Rubric is marked Complete, both the Intake and Exit Rubric are no longer modifiable nor can they be deleted. Until the Exit Rubric is marked Complete, the Intake Rubric remains modifiable. This will allow changes to be made, in particular as a response to feedback from VR staff regarding Intake Rubric content/issues.

The content that is displayed for a rubric depends upon the level of completion:

- While an Intake Rubric is in Pending or Draft status, only the Intake Rubric fields will be displayed.
- After an Intake Rubric is Completed, *both* Intake and Exit Rubric fields will be displayed.
- After the Exit Rubric is Completed, *both* the Intake and Exit Rubric fields *and* the calculated (display-only) Measured Skills Gains fields will be displayed.

The top of the rubric page will display the Intake Rubric and the Exit Rubric status.
Until the first Save of an Intake or Exit Rubric, its status will show as Pending.

Intake Rubrics can be entered regardless of the current status of the case.

An Exit Rubric cannot be entered until/unless an Intake Rubric is Completed.

During entry of the Intake Rubric or the Exit Rubric, the content can be Saved as often as desired and will stay in a Draft status until the Mark Intake Rubric Complete button is used.

- This means that the rubric does **not** all have to be entered in one sitting; you can partially save and return to the rubric as often as needed until you have completed all entries.

At the end of each service category section on the Rubric, there is a field to enter Summary/Recommendations.

System-calculated weighted score totals per service category will be displayed on the summary/recommendations row. These cannot be changed.

All rubric fields are required except for Interview Location.

In order to mark a Rubric complete, all required fields must be entered. An error will occur if Mark Complete is used, with the incomplete fields highlighted in yellow with a message in red font that the field is required.   Note: Save or Save and Close can be used on a rubric as often as desired, even when required fields are still missing.

The rubric questions are exactly the same as those shown in the pre-test example on the portal Home page Reference Materials, with a few additional fields in the header 'Intake Rubric Details and Exit Rubric Details' section including: Interview Completed By, Interview Date, Interview Location.

The rubric questions for the Intake Rubric and Exit Rubric are identical to each other with one exception. On the Exit Rubric in the Exit Rubric Details section at the top of the Exit Rubric there is one additional question: 'Will the Exit Rubric need to be waived due to consumer exiting the Pre-ETS program without availability to perform an exit interview?'

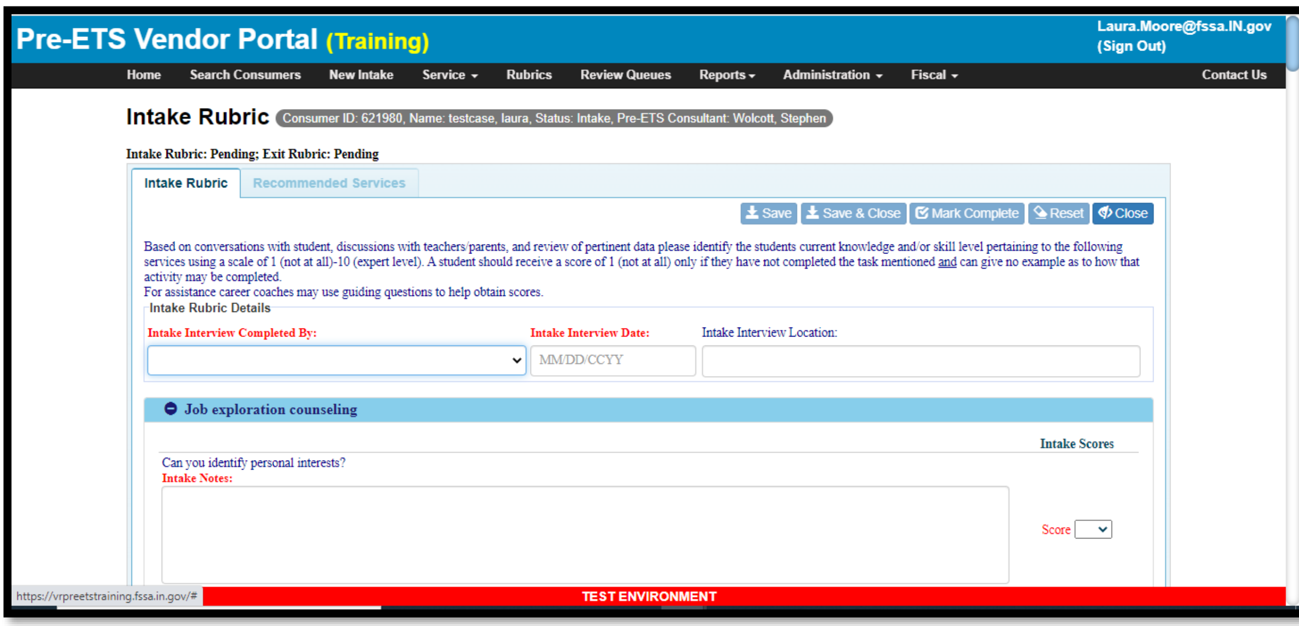
- If the question is answered Yes:
  - The Exit Rubric status will change to Waived, and an Exit Waiver Justification notes field will be required.

  - No other Exit Rubric fields will need to be entered, and the exit rubric will not need to be marked complete.
- If the question is answered No, the same fields required for the Intake Rubric will also be required for the Exit Rubric. The fields will be labeled as Intake versus Exit and all Intake Rubric information will be displayed.

All of the Notes text boxes can be expanded or contracted by double clicking.

The entire Service Category sections can be expanded or contracted by clicking the – or + symbol next to the category.

An Intake Rubric can be modified after it is marked complete. However, once the Exit Rubric is marked complete, both the Intake and Exit Rubric content are ‘locked’ and neither can be updated.



Recommended Services

This page will display (in read-only mode) the content of the intake rubric’s service category summary notes, as well as the total score and total weighted score per service category.

In addition, a modifiable Recommended Services Notes field is available for users to enter a brief summary of the recommended services.

- Note: For users that use the Service Category Summary notes to summarize recommended services per category, these can either be copied using Cut (Ctl+C) and Paste (Ctl+V) into the Recommended Services Notes field, or a reference can be made in the field to ‘Refer to service category summary notes above.’
- For consultants who have *not* used the Intake Rubric summary notes to list recommended services, use the Recommended Services Notes to list a summary of the needed services.

All of the Notes text boxes can be expanded or contracted by double clicking.This is useful when viewing long notes narratives.

The service categories on the Recommended Services page are listed in order of lowest score to highest score, with the areas needing the most improvement at the top of the list for prioritization purposes. This means that the order in which service categories display on the page will vary by student based on their individual needs.

Once the Recommended Services Notes is Saved, the consultant can use the Submit button to place the intake rubric/recommended services into VR's Review Queue.

- On Submit, a pop-up screen will appear with an optional Comment box. This is optional for consultants except when re-submitting when in Interrupted Services status (see notes on statuses below).

Effective August 1, 2022 for cases still in Intake status, it will be necessary to submit the Recommended Services for VR's review in order to add new services.

- This means that in addition to uploading Disability Documentation and having a Completed Intake Rubric, the Recommended Services also needs to be submitted in order to add new services. NOTE: The Recommended Services don't need to be Approved in order to proceed, they simply need to be Submitted.

- Cases already In-Service as of August 1 are **not** affected by the new requirement for Recommended Services, only cases in Intake status will need to submit Recommended Services as an additional requirement.
- Note: It is not necessary to complete Recommended Services for Exit Rubrics. Recommended Services are specific to Intake Rubrics.
    - The recommended services fields are therefore disabled for cases except for those that *are not yet In-Service* and have intake rubrics that were completed *on or after 8-1-22*, to prevent unnecessary submission of recommended services.
    - For older cases which had intake rubrics that were uploaded as documents, exit rubrics can also be uploaded as a document.

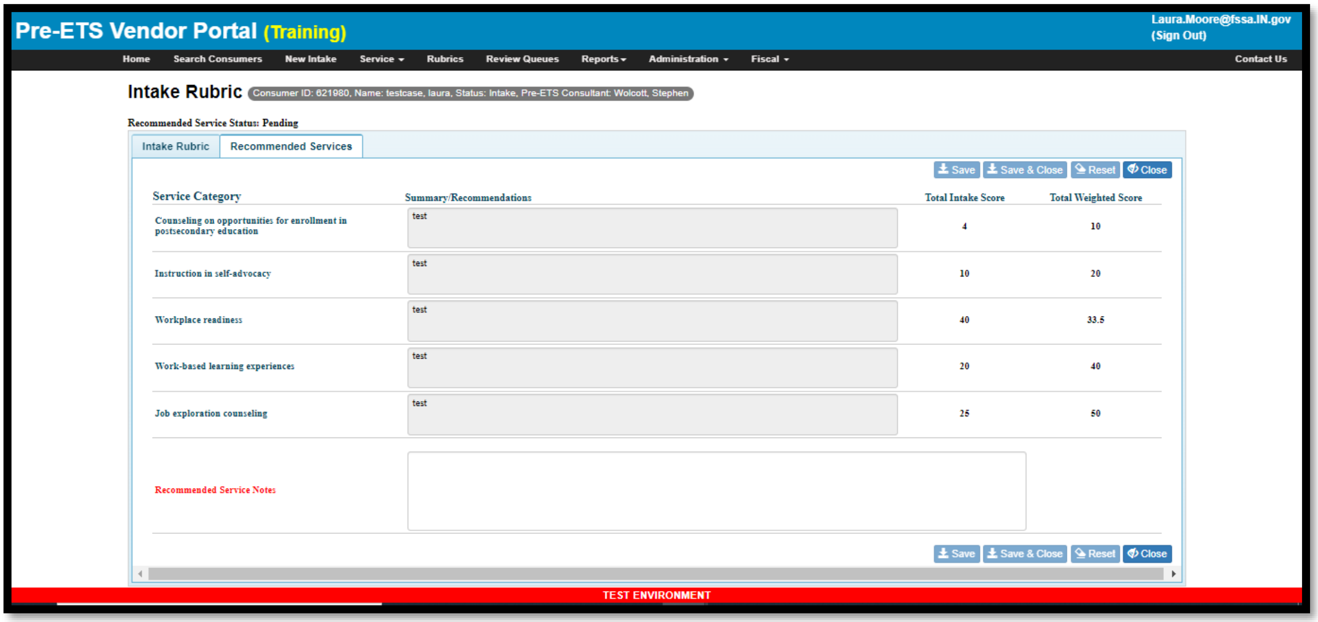
After Save and on selecting the Submit button, a pop-up screen will display which allows the user to enter a comment if desired.

Recommended Services Comments can be used for 'back and forth' communications during the review process as needed.

- Comments are optional for consultants for Submit (or re-Submit of Not Approved), but are not optional when resubmitting Interrupted Services.
- Comments are optional for VR's entry for Approved recommended services. Comments are required for VR's entry for Not Approved or Interrupted Services.

The latest (most recent) Comments from consultants and VR will display on the Recommended Services page. If there is more than one comment each, a View All Comments button will appear which will launch a pop-up screen with all of the 'back and forth' comments with statuses and dates.

Recommended Services facilitates a more formal review process in which VR will review the intake rubric and associated recommended services once they are completed/submitted by the consultant.



Review Queues Search

This page can be used to search for items under review, by Review Type. The status of the item will determine 'whose queue' it is in, as in whether it is in the consultant's or VR's 'to do' list.

At this time, there is only one Review Type, which defaults to Intake Rubric/Recommended Services.

Type of Search

There are four (4) types of searches: Consumer ID, Consumer Name, School, and County. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

Consumer ID is the unique Pre-ETS consumer number that is assigned to the consumer's case at the time of intake. Searching by Consumer ID will result in a list of one row with Intake and Exit Rubric statuses displayed or a message for No records found.

For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.

- Example: Smith,John or Smith,J).
- If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.

- Like the Consumer ID search, the Consumer Name search will result in a list of all rubrics for which a consumer name has a full or partial match.

The School drop-down will present a full list of the schools covered under the Pre-ETS Contracts. This drop-down will list only the schools covered by the selected Contractor. The School search will result in a list of all existing recommended services for consumers associated with that particular school (as specified on the Intake screen for consumers).

The County drop-down represents the consumer's Residential County as shown on the Intake screen.

Additional Search Criteria

Additional / multiple filters can be applied: Consumer Status, Contractor, Agency, Pre-ETS Consultant, Review Type (which currently defaults to Intake Rubric/Recommended Services), Current Review Status, Submitted Date From, Submitted Date To.

Submitted Dates pertain to the first Submit date for the intake rubric/recommended services review.

Current Review Statuses for Recommended Services include: Pending, Draft, Submitted, Approved, Not Approved, Interrupted Services or Interrupted Services Resubmitted.

These statuses basically identify the progress point in the review process:

- Pending (the Recommended Services have not been entered yet, i.e., don't exist)
- Draft (the Recommended Services have been saved but are still a work in progress and have not been submitted)
- Submitted (the Intake Rubric/Recommended Services have been submitted (or re-submitted if Not Approved) for VR's review. This effectively places the intake rubric/recommended services into VR's Review Queue.
- Approved (VR has approved the intake rubric/recommended services)
- Not Approved (VR has reviewed but identified some issues which will need to be addressed. VR will provide comments listing the issues to be addressed on the rubric or recommended services).
- Interrupted Services (VR has identified serious on-going/recurring issues and is stopping any new services for the student until the issue is appropriately addressed). It is anticipated that this will be a rare event.) NOTE: This recommended services status also changes the case status to Interrupted Services.
- Interrupted Services Resubmitted (the consultant has addressed the issues on an Interrupted Services case and has resubmitted for VR's review). This status is singled out from Submitted items so that Interrupted Services Resubmitted will be treated as high priority review in order to reinitiate services for a student as quickly as possible.

As always, the more selection criteria used the smaller the search results will be, and vice versa.

This search can be used to 'work' the user's review queue. The Review Queue allows both consultants and VR Youth Counselors to review items in their 'to do' queue.

- For consultants, the status defaults to Not Approved. However, the status can be changed to All (and the results column can be sorted) or any specific status (such as Interrupted Services).

- For VR, the status defaults to Submitted. However, the status can be changed to All (and the results column can be sorted) or any specific status (such as Interrupted Services Resubmitted).

Consultants can check periodically (weekly is suggested) after you start to submit items for review.

Consultants should check to see if any items are in the Not Approved (or Interrupted Services) status. If so, the VR Youth Counselor will have provided a comment listing the issues to be addressed on the intake rubric and/or the recommended services. Once these issues are addressed, Save the changes to Intake Rubric/Recommended Services and click Submit to put the case back into VR's Review Queue.

VR staff will check periodically (weekly is suggested) to check for Submitted items (or Interrupted Services Resubmitted) to be reviewed/approved.

Results Grid

Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.

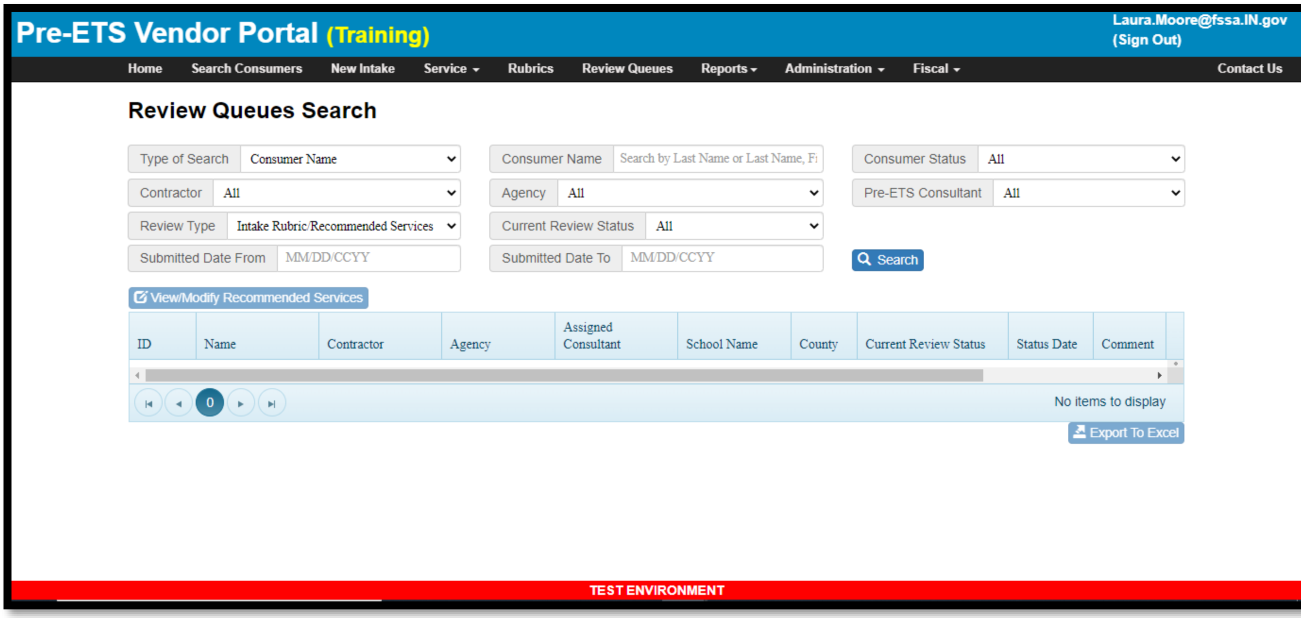
Export to Excel

All records in the results grid (even if multiple pages) can be exported to excel by clicking the Export to Excel button at lower right underneath the results grid. The excel file will appear in lower banner on the screen, on left hand side. Double click on the box to open the file and then save as needed. Note: As always, proper confidentiality and security precautions must be taken with any files containing PII.

Available Functions

When a consumer record is selected in the grid, available functions include: View/Modify Recommended Services. This will launch the existing Recommended Services tab of the rubric in its current state of completion.

The user can View/Modify by double-clicking the recommended services in the results grid or selecting it and clicking the View/Modify button. Only one recommended services at a time can be selected for View/Modify.



Reports Menu

Demographic Report

This report is designed to assist with reporting of consumer counts, average age, and other statistics.

This report is available to Contractor Leads, Agency Leads and VR Pre-ETS Administrators.

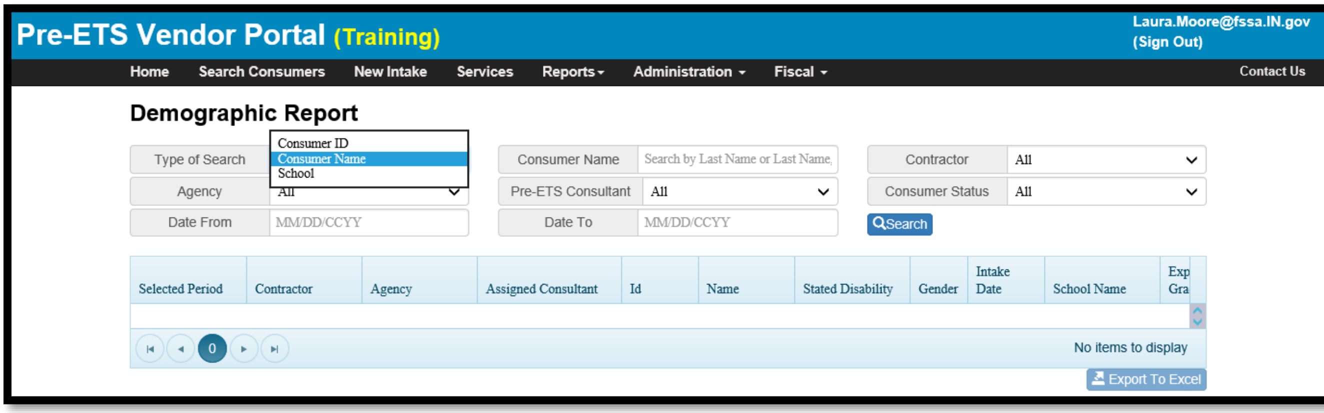
This report is available for export to Excel to sum, sort or filter the results as desired. Note: This report contains PII and PHI. Care must be taken to protect all consumer confidential information.

The following selection criteria is available via Type of Search: Consumer ID, Consumer Name, School (name). Additional criteria include: Contractor, Agency, Pre-ETS Consultant (which represents the Assigned Consultant), Consumer Status, and Date From/Date To for the desired activity date range.

The date range selects cases that were active during the selected period. For example, when the Intake Date is after the End Date or the Closure/Exit Date is prior to the Intake Date, the case will not be included. When no dates are specified, all cases for the specified Contractor/Agency/Pre-ETS Consultant will be included.

The Contractor field and Agency field default for contractors. Contractor Leads can change the default Agency to All if desired for a list of consumers for all agencies within their contract, per the search criteria. Entering additional search criteria will narrow the search results.

For Contract Leads and VR Pre-ETS Administrators, Secondary assignments will show up as ‘duplicate’ records for the consumer, but with different Contractor/Agency. This will only occur for Contract Leads if the consumer is ‘shared’ across multiple agencies within their contract. Secondary assignments are shown with Secondary in parantheses next to the Assigned Consultant name. When using the report for statistical reporting/summary counts and it is known that Secondary assignments might exist within a contract for example, care must be taken to remove duplicate entries for the same consumer after the report is exported to Excel.



Demographic History Report

This report is very similar to the Demographic Report (designed to assist with reporting of consumer counts, average age, and other statistics). Search criteria is the same.

This report is available to Contractor Leads, Agency Leads and VR Pre-ETS Administrators.

This report is available for export to Excel to sum, sort or filter the results as desired. Note: This report contains PII and PHI. Care must be taken to protect all consumer confidential information.

Although similar to the Demographic report, the Demographic report will *exclude* cases that are no longer assigned to the Contractor/Agency as a Primary or Secondary. The Demographic History report will *include* cases that were previously assigned, even if the case has since been transferred to another Contractor/Agency. This will allow for full reporting of clients served during a specified time range, even if the case is no longer assigned.

Note: The report includes selection criterion of Pre-ETS Consultant, and the Assigned Consultant is a column in the report. Therefore, if a case was transferred to a different consultant within a Contractor/Agency, the client will display more than once in the report (once for each Assigned Consultant}. Care should be taken to remove duplicates when seeking a count of total clients served.

Document History Report

This report provides a report for all (undeleted) documents per selection criteria.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants and VR Pre-ETS Administrators.

This report is available for export to Excel.

The Document report is similar to the display on the Document screen, except that the Document screen will display documents for only one client case. The Document report will list documents for *all* cases within the selection criteria that are viewable per the user's security rules.

The Document report will display documents uploaded by the user's Contractor/Agency, even if the case is no longer assigned as a Primary or Secondary.

View is the only functionality allowed (Modify and Delete are not allowed from this report).

On the Document screen, all documents are displayed for the Primary assigned Contractor/Agency. On this report, to see all documents (even those uploaded by other agencies previously assigned), Contractors can specify All in the Agency selection criteria.

Mailing Address Report

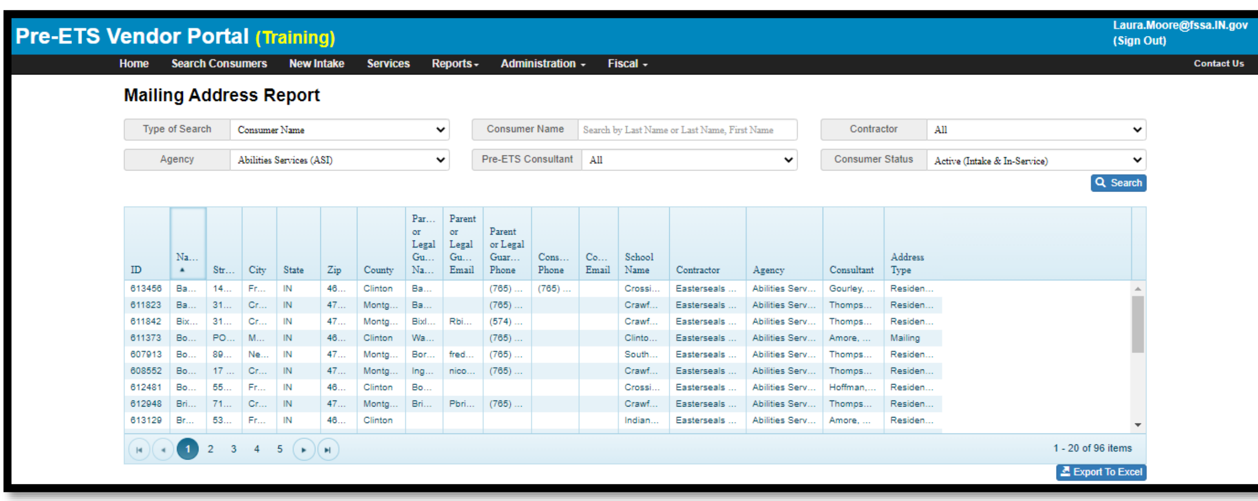
This report is designed to create lists of consumer addresses to be used for mailings or alternate contact methods.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants and VR Pre-ETS Administrators per normal security rules (i.e., users will only be able to list consumers for whom they have security access).

To narrow the result set, filters can be used such as Type of Search = School, and/or by specifying Contractor, Agency or Pre-ETS Consultant. The results can also be filtered by case status (Intake, In-Service, Inactive, Active (Intake & In-Service). The default is Active (Intake & In-Service).

The report includes consumer ID, name and address, as well as Contractor, Agency and Pre-ETS Consultant. For informational purposes the Address Type is also included to indicate residential or mailing address (mailing address is used when different from the residential address). Alternate contact information is also listed: Parent or Legal Guardian Name, Email, Phone and Consumer Email and Phone.

This report can be sorted by any column and is available for export to Excel. Columns can be expanded or contracted as in the below example (contracted to hide identifying information).



ID	Na...	Str...	City	State	Zip	County	Par... or Legal Gu... Na...	Parent or Legal Gu... Email	Parent or Legal Guar... Phone	Cons... Phone	Co... Email	School Name	Contractor	Agency	Consultant	Address Type
613456	Ba...	14...	Fr...	IN	46...	Clinton	Ba...		(765) ...	(765) ...		Crossi...	Easterseals ...	Abilities Serv...	Gourley, ...	Residen...
611823	Ba...	31...	Cr...	IN	47...	Montg...	Ba...		(765) ...			Crawf...	Easterseals ...	Abilities Serv...	Thomps...	Residen...
611842	Bix...	31...	Cr...	IN	47...	Montg...	Bixl...	Rbi...	(574) ...			Crawf...	Easterseals ...	Abilities Serv...	Thomps...	Residen...
611373	Bo...	PO...	M...	IN	46...	Clinton	Wa...		(765) ...			Clinto...	Easterseals ...	Abilities Serv...	Amore, ...	Mailing
607913	Bo...	89...	Ne...	IN	47...	Montg...	Bor...	fred...	(765) ...			South...	Easterseals ...	Abilities Serv...	Thomps...	Residen...
608552	Bo...	17 ...	Cr...	IN	47...	Montg...	Ing...	nico...	(765) ...			Crawf...	Easterseals ...	Abilities Serv...	Thomps...	Residen...
612481	Bo...	55...	Fr...	IN	46...	Clinton	Bo...					Crossi...	Easterseals ...	Abilities Serv...	Hoffman,...	Residen...
612948	Bri...	71...	Cr...	IN	47...	Montg...	Bri...	Pbri...	(765) ...			Crawf...	Easterseals ...	Abilities Serv...	Thomps...	Residen...
613129	Br...	53...	Fr...	IN	46...	Clinton						Indian...	Easterseals ...	Abilities Serv...	Amore, ...	Residen...

Possible Duplicate Consumer Report

This report is designed to identify duplicate consumer entries. When a duplicate SSN is entered for a new Intake, entry will be prevented. However, often the SSN is not available at the time of entry and a unique 'temporary' SSN is entered. This report will identify duplicate consumers based on an exact match of Last Name, First Name, DOB, and Gender –or- a possible duplicate with an exact match on all but the first name, but with at least the first two characters of the first name matching.

These will be displayed in the results grid under Match Type as either an Exact Match (i.e., based on exact match on Last Name, First Name, DOB, and Gender) or First Name Mismatch (i.e., based on exact match on Last Name, DOB, and Gender, but the first name does not match after the first two characters of the first name).

This report is available to all users and is available for export to Excel in order to sum, sort or filter the results as desired. The report works much like a Search, allowing selection criteria.

The following selection criteria is available: Contractor, Agency, Pre-ETS Consultant, and School. The Contractor field will default for contractors but can be selected by VR Pre-ETS Administrators. Entering additional search criteria will narrow the search results.

The report content will list the client's ID and Name, as well as the assigned Contractor, Agency, Assigned Consultant, case Status, School Name, etc.

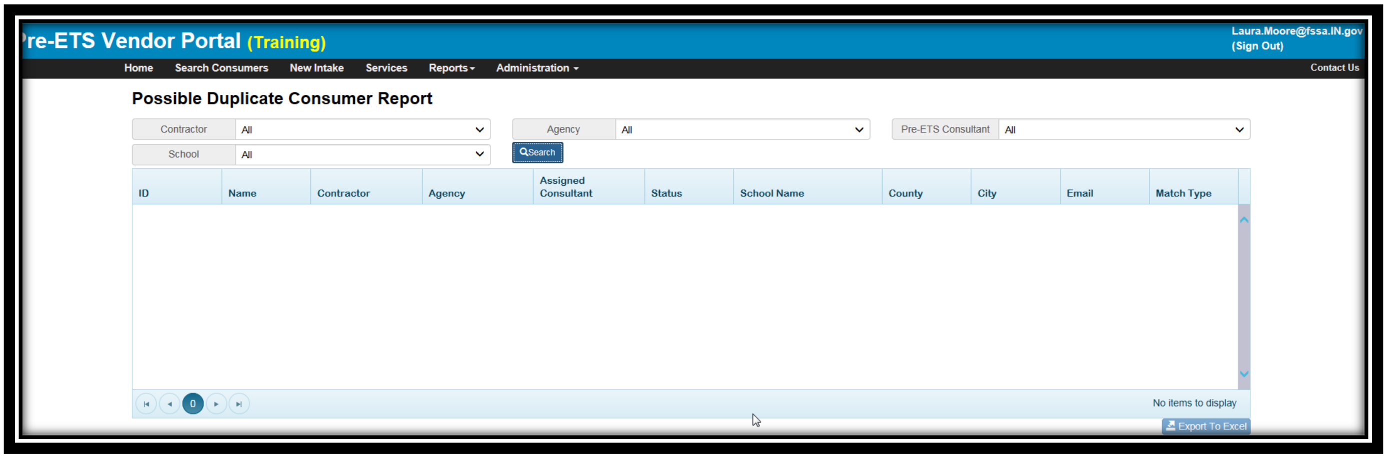
Only Primary case assignments will be included in this report. Secondary assignments will not be listed.

If only one occurrence of a consumer's name is shown in the result set, this means that the same consumer has been registered with another Contractor. When this occurs, please email Fssa.Pre-Ets@fssa.IN.gov for assistance.

The purpose of this report is to facilitate early detection and cleanup of duplicate cases. This should occur as quickly as possible after Intake, prior to the entry of services. The earlier that the duplicate case is detected, the easier it will be to correct the duplication. For this reason, it is recommended that the report should be run frequently for early detection.

There should be only one Intake entry per client. The oldest case should be retained, and the 'extra' newer case should be deleted. A deletion is allowable only if the case is still in Intake Status (and has no documents/services). To delete a case, please email Fssa.Pre-Ets@fssa.IN.gov to request deletion of a duplicate case.

Sometimes, Documents and/or Services may have been entered under both duplicate cases. When this occurs, please email Fssa.Pre-Ets@fssa.IN.gov for guidance and assistance.



Service Activity Notes

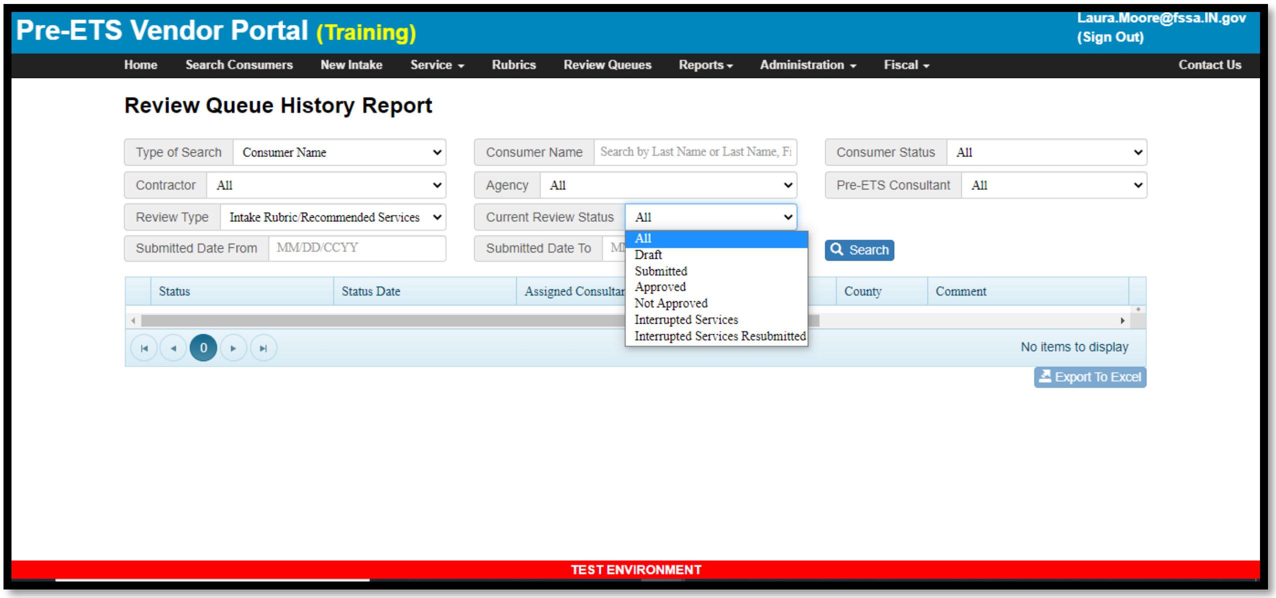
This report will list all service notes for the selected consumer(s) with service activity within the Date From/Date To date range.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants, and VR Pre-ETS Administrators. For Contractor Leads, Agency Leads and Pre-ETS Consultants, the Contractor and Agency field will default. For consultants, the Service Consultant field will also default. Contractor Leads can change the default Agency.

As with other reports, entering additional search criteria will narrow the search results. The Service Consultant search criteria represents the consultant who provided the services. Note: For older services prior to Feb 2021, Service Consultant might instead represent the person who entered the service information rather than the consultant who provided the services.

Some search criteria or report fields are conditionally available depending upon the selected Contractor. For example, DWD Region search criterion and Model Service ID field in the search results are relevant only to SOI DWD and are not available for other Contractors.

This report can be exported to Excel and the Notes fields can be expanded within Excel to improve readability.



Service Session Details for Monthly Billing

This report is designed to facilitate billing review. This report is currently available to Pre-ETS Administrators, Contract Leads, Agency Leads, and Pre-ETS Consultants. The report is available for export to Excel in order to sum, sort or filter the results as desired. The report works much like a Search, allowing selection criteria.

The following selection criteria is available: Contractor, Agency, Service Consultant, Date From and Date To, and Service Category. The Contractor and Agency fields will default for contractors but can be selected by VR Pre-ETS Administrators. Contractor Leads can change the Agency field. For consultants, the report will show only the services that they provided, and the Service Consultant will default accordingly to their name. Note: For older services prior to Feb 2021, Service Consultant might instead represent the person who entered the service information rather than the consultant who provided the services. To select a single month, enter the start and end date for the month in the Date From and Date To fields (MM/DD/CCYY) format.

A single Service Category can be selected or All.

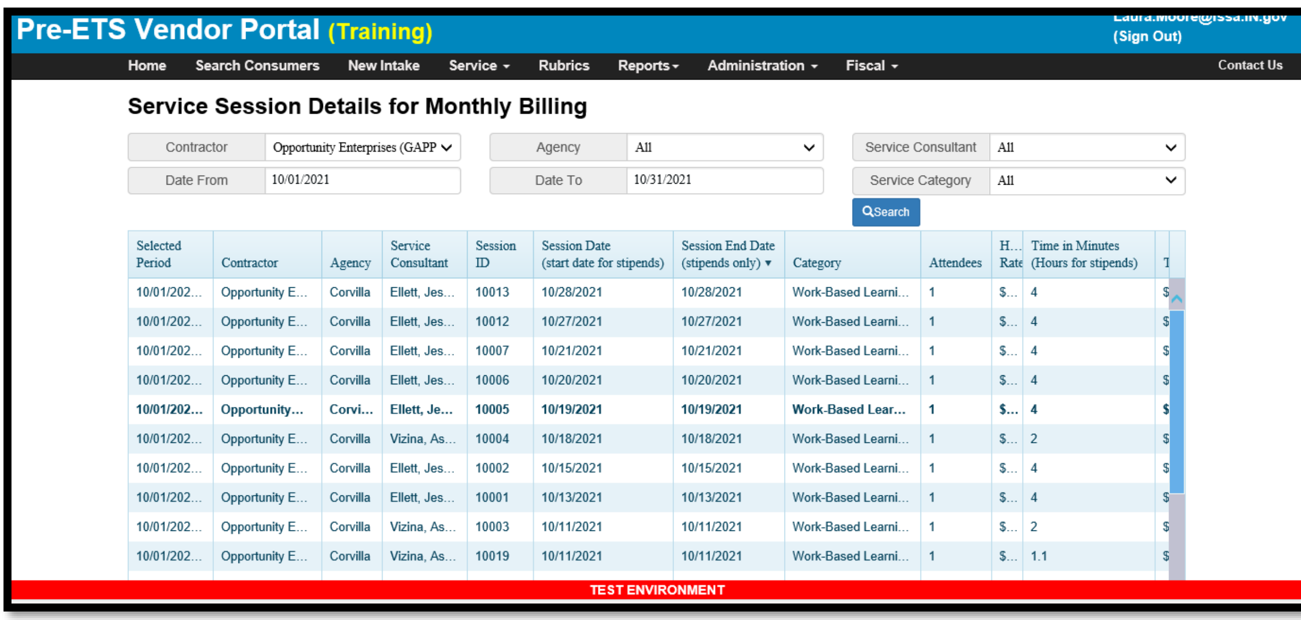
The report content will list each Service Session and Stipend Session for the selected Contractor(s) and Service Category within the Selected From and To time period. The report will include a line for each Service Category within the Session. The Session Date (start date for stipends), Session End Date (stipends only), number of attendees, Time in Minutes (Hours for stipends) for that Service Category, and the Rate for that session will be included, as well as the calculated Total Amount for the service or stipend within the Session. The Service Consultant is also included. Rates will reflect the rate in effect at the time the service was provided, or for stipends will be based on the stipend hourly wage.

Because a line is listed for each Service Category within the Session, up to 5 lines per session may be displayed. Consumer names are not included in this report. Stipends only have one line per session, as there is only one consumer and only one service category.

On the far right of the results grid, a View Details button will be displayed. When clicked, this will open the Service Session screen associated with the record in the grid.

Example to determine the total amount for a service category within a month for a Contractor:

- Select desired Contractor
- Select desired Service Category
- Select desired month's Date From and Date To (enter start and end date in the From and To fields)
- Export results to Excel
- Use the Excel Sum function against the Total Amount column to determine the total amount.
- This process can be repeated for each Service Category. Alternatively, a report can be run for the month for All Service Categories in order to obtain the overall total amount for the month.
- If you wish to see one Agency's portion of the billing under that Contractor for the period, repeat above steps but also use the Agency filter to report one agency at a time. Note: For total billing for the Contractor, do not use the Agency filter.



Selected Period	Contractor	Agency	Service Consultant	Session ID	Session Date (start date for stipends)	Session End Date (stipends only)	Category	Attendees	H... Rate	Time in Minutes (Hours for stipends)	T
10/01/202...	Opportunity E...	Corvilla	Ellett, Jes...	10013	10/28/2021	10/28/2021	Work-Based Learni...	1	$...	4	$
10/01/202...	Opportunity E...	Corvilla	Ellett, Jes...	10012	10/27/2021	10/27/2021	Work-Based Learni...	1	$...	4	$
10/01/202...	Opportunity E...	Corvilla	Ellett, Jes...	10007	10/21/2021	10/21/2021	Work-Based Learni...	1	$...	4	$
10/01/202...	Opportunity E...	Corvilla	Ellett, Jes...	10006	10/20/2021	10/20/2021	Work-Based Learni...	1	$...	4	$
10/01/202...	**Opportunity...**	**Corvi...**	**Ellett, Je...**	**10005**	**10/19/2021**	**10/19/2021**	**Work-Based Lear...**	**1**	**$...**	**4**	**$**
10/01/202...	Opportunity E...	Corvilla	Vizina, As...	10004	10/18/2021	10/18/2021	Work-Based Learni...	1	$...	2	$
10/01/202...	Opportunity E...	Corvilla	Ellett, Jes...	10002	10/15/2021	10/15/2021	Work-Based Learni...	1	$...	4	$
10/01/202...	Opportunity E...	Corvilla	Ellett, Jes...	10001	10/13/2021	10/13/2021	Work-Based Learni...	1	$...	4	$
10/01/202...	Opportunity E...	Corvilla	Vizina, As...	10003	10/11/2021	10/11/2021	Work-Based Learni...	1	$...	2	$
10/01/202...	Opportunity E...	Corvilla	Vizina, As...	10019	10/11/2021	10/11/2021	Work-Based Learni...	1	$...	1.1	$

Service Session Details by Consumer

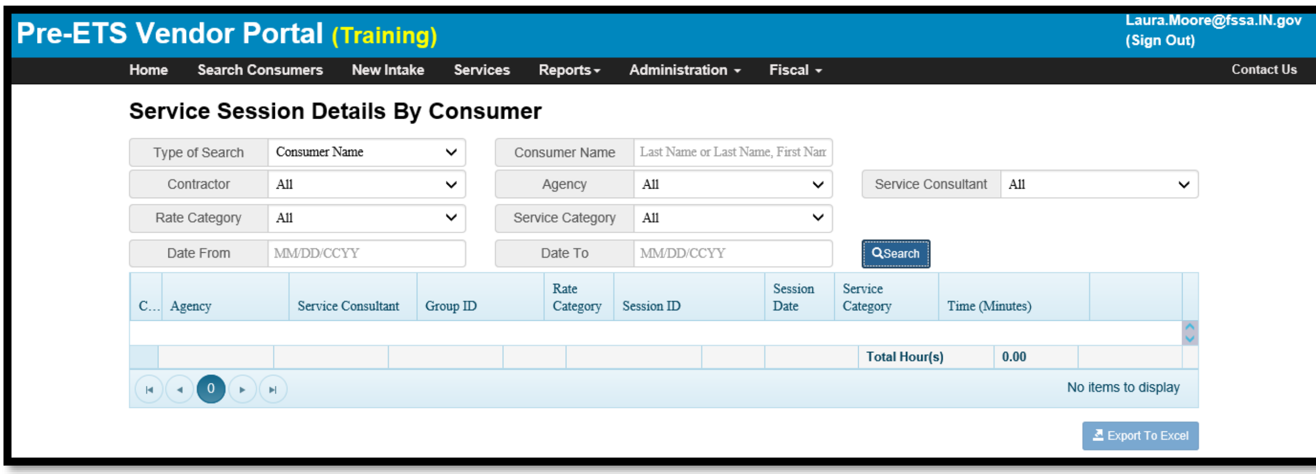
This report is similar to the Service Session Details report but lists consumer and does not include billing information. Service Consultant represents the consultant who directly provided the service. Note: For older services prior to Feb 2021, Service Consultant might instead represent the person who entered the service information rather than the consultant who provided the services. All services within the Date From/Date To date range per the selection criteria will be listed. Time spent in minutes will be included on the report.

The report will subtotal at the consumer level and will provide a grand total. Totals are reported as hours, but detail is provided in minutes. The report can be exported to Excel.

For group sessions, time spent per session represents the total time per service category divided by number of consumers.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants, and VR Pre-ETS Administrators. For Contractor Leads and Agency Leads and Pre-ETS Consultants, the Contractor and Agency field will default. Contractor Leads can change the default Agency.

As with other reports, entering additional search criteria will narrow the search results.



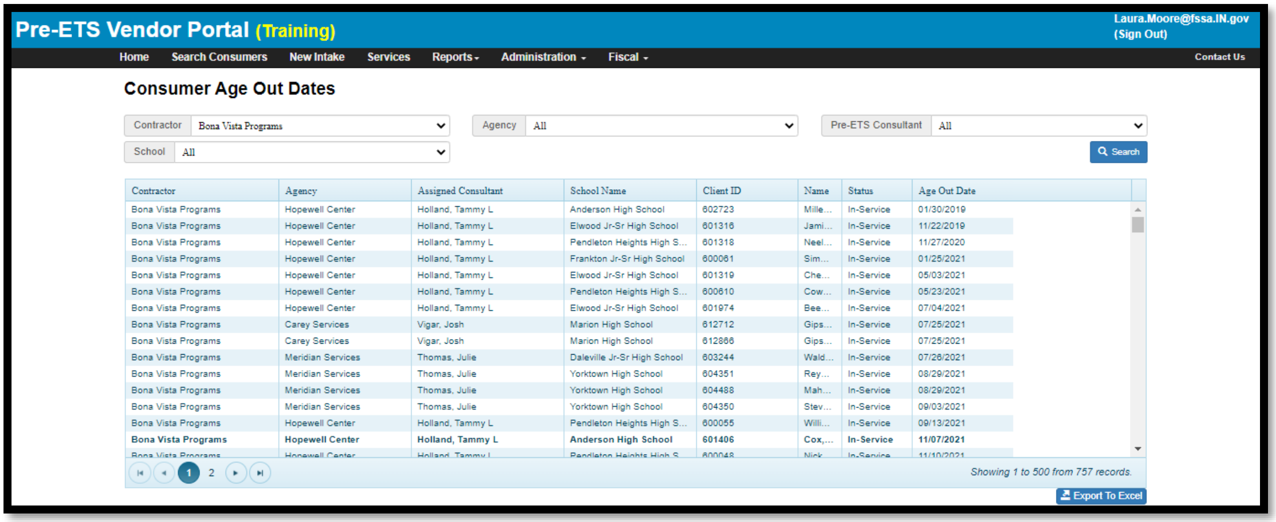
Consumer Age Out Dates

This report is designed to identify consumers that have already or will soon 'age out' of the Pre-ETS program at 23 years of age. The date on which the consumer turns 23 is listed in the "Age Out Date" column. The report is sorted by Age Out Date, in sequence of oldest dates to newest dates to easily identify consumers that will need to have their cases inactivated. (See Administration / Change Consumer Status / Inactivate Case.)

The report includes only active cases (with status of Intake or In-Service). The search criteria allow results to be filtered by Contractor, Agency, Pre-ETS Consultant or School. As with other reports, entering additional search criteria will narrow the search results.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants, and VR Pre-ETS Administrators. For Contractor Leads and Agency Leads and Pre-ETS Consultants, the Contractor and Agency field will default per normal security rules (i.e., users will only be able to list consumers for whom they have security access). Contractor Leads can change the default Agency.

This report is available for export to Excel.



Missing Stipend Wage Justification

This report is designed to identify consumers that have a stipend session but have not yet uploaded the required Stipend Wage Justification documentation. This documentation will be required in order to Generate and Submit the invoice that includes the stipend sessions.

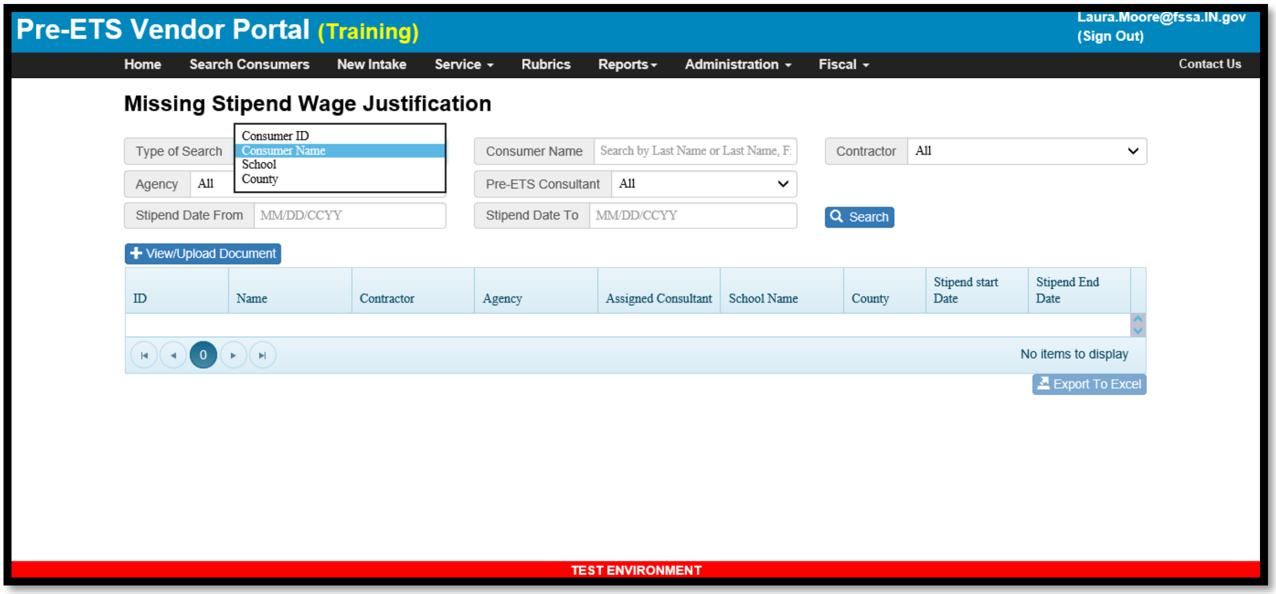
The search criteria allow for several filters, including Consumer ID, Consumer Name, School, or County, one of which can be used in conjunction with additional filters for Contractor, Agency, Pre-ETS Consultant and/or Stipend Date Range.

The report will list one row for every stipend session for a consumer that does not yet have the required documentation, and so it is possible to have multiple rows per consumer. As with other reports, entering additional search criteria will narrow the search results.

Because the invoice submission will error out due to missing stipend wage documentation, the report can be proactively used prior to invoicing time to identify and upload the required documentation. For convenience, a View/Upload button can be used for the selected consumer row, to launch the consumer's Document screen and upload the required document. Once the required documentation is uploaded, all rows for that consumer will 'disappear' from the report.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants, and VR Pre-ETS Administrators. For Contractor Leads and Agency Leads and Pre-ETS Consultants, the Contractor and Agency field will default per normal security rules (i.e., users will only be able to list consumers for whom they have security access). Contractor Leads can change the default Agency.

This report is available for export to Excel.



Review Queue History Report

This report can be used to track the intake rubric/recommended services review progress including the back and forth status updates, dates, and comments by consultants and VR. The report is grouped by consumer.

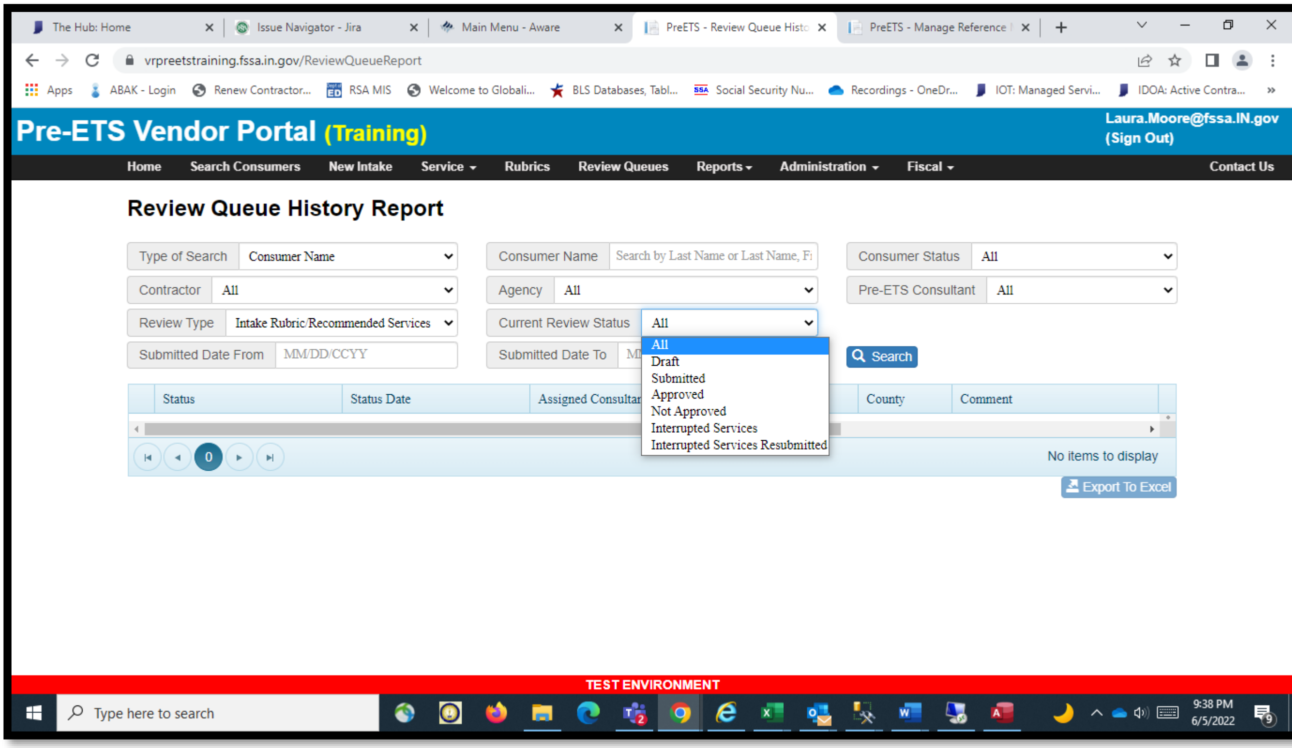
The search criteria allow for several filters, including Consumer ID, Consumer Name, School, or County, one of which can be used in conjunction with additional filters for Contractor, Agency, Pre-ETS Consultant, Status for Intake/Recommended Services and/or Submitted Date Range. Submitted is the date that the case was originally Submitted for review/approval.

The report will list one row for every intake rubric/recommended service status update for a consumer with a recommended service record. The report will include statuses, status dates, and comments (if any) entered by the consultant or VR.

Statuses entered by consultants include: Submitted and Interrupted Services Resubmitted.

Statuses entered by VR include: Approved, Not Approved, Interrupted Services.

This report is available to Contractor Leads, Agency Leads, Pre-ETS Consultants, and VR Pre-ETS Administrators. For Contractor Leads and Agency Leads and Pre-ETS Consultants, the Contractor and Agency field will default per normal security rules (i.e., users will only be able to list consumers for whom they have security access). Contractor Leads can change the default Agency.



Administration Menu

Transfer Case

This function is useful when a consumer moves to a new school district, or when an employee retires, transfers to a non-Pre-ETS position, or is terminated and their caseload needs to be reassigned.

When it is necessary to transfer a case, all services that were provided under the original Agency should be entered *prior* to the transfer.

When an employee retires or is terminated, etc. all of their cases must be transferred before their user registration can be inactivated.

Contractor Leads, Agency Leads and VR Pre-ETS Administrators will have access to this function.

Pre-ETS Consultants will not have access to this function.

When a consumer is entered into the system via the Intake screen, the consumer's case is automatically assigned to the person that entered the Intake information. The assumption is that the person entering the case will be the Pre-ETS consultant who will be responsible for the case on an on-going basis. The Contractor/Agency/Pre-ETS Consultant at Intake is considered to be the Primary assignment. However, a case can be transferred as needed. The Primary assignment (i.e., case ownership) is carried with the transfer.

Contractor Leads and Agency Leads will have access to transfer cases to the Contractor Lead or to any Pre-ETS Consultant or Agency Lead in any of the Agencies within their Contractor group.

Statewide, VR Pre-ETS Administrators can transfer cases to any Contractor Lead, Agency Lead or Pre-ETS Consultant across Contractor groups.

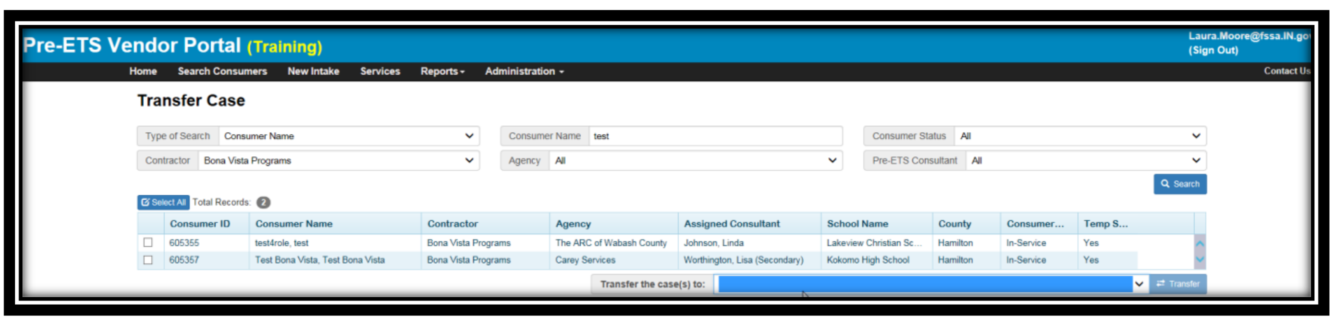
If there is a need to transfer a case to a Contractor/Agency outside of your contract, please send a request via email to the VR Pre-ETS Administrators at Fssa.Pre-Ets@fssa.IN.gov.

The screen will allow the user to search in similar fashion to the Consumer Search screen. The user can then select a single case or multiple cases or all cases from the results grid and transfer them to the desired user (Pre-ETS Consultant, Agency Lead or Contractor Lead).

Note: If a consumer is shared across Agencies within a Contract, both Primary and Secondary consumer case assignments will be listed. Secondary assignments are noted as such in the grid results (in parantheses to the right of the Assigned Consultant's name).

A Primary assignment case cannot be transferred to a Contractor/Agency that already has a Secondary assignment, and vice versa. An error message will inform that the case can be transferred within an Agency. A case can be assigned from one Pre-ETS Consultant to another *within* a Primary or Secondary Contractor/Agency.

A case that is included in an existing student group cannot be transferred until the case is removed from the student group. This should be done before transferring the student to a new contractor/agency, for example because the student has moved and is now planning to attend a new school. If you need assistance with this, please contact the *fssa.pre-ets@fssa.in.gov* email helpdesk.



Manage Users

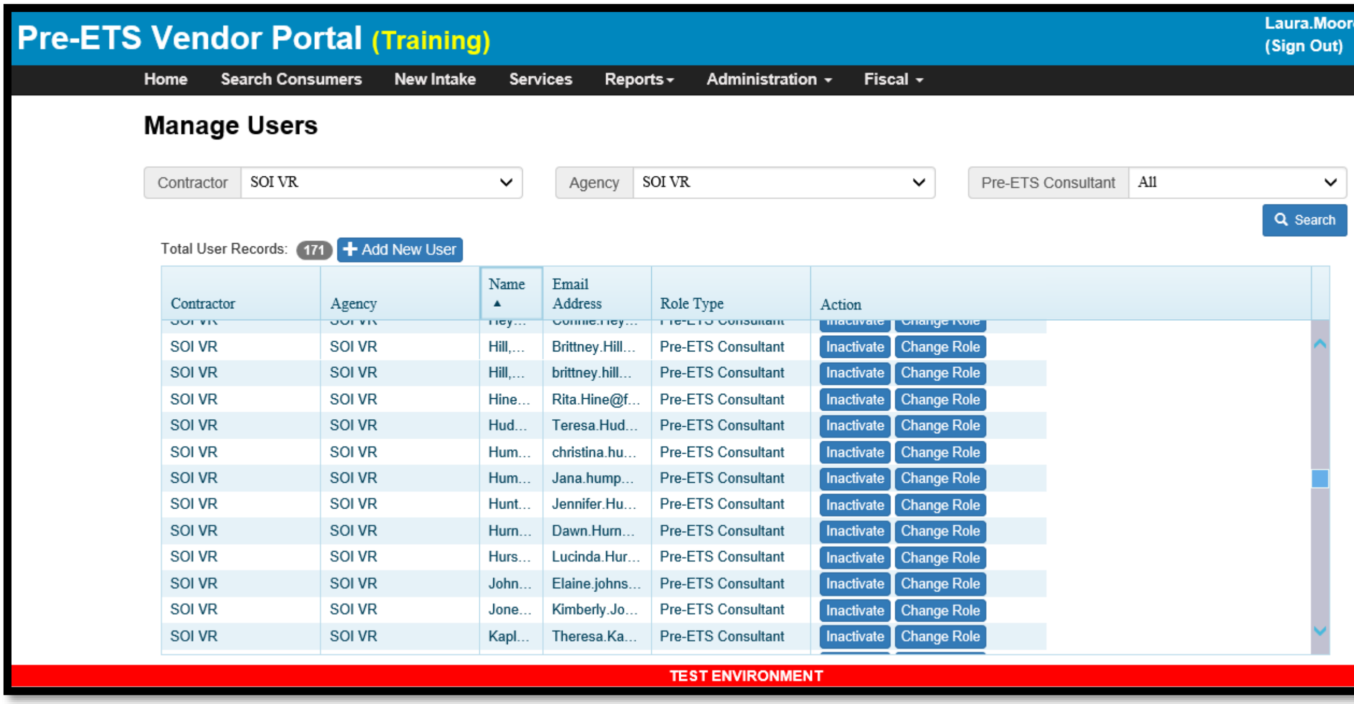
Manage Users has two functions: Add New User and Inactivate user.

Agency Leads, Contractor Leads and VR Pre-ETS Administrators will have access to this functionality.

Results Grid

By default, the Results Grid will list the user's Contractor/Agency. Pre-ETS Administrators can select All or select the desired Contractor/Agency.

If desired, enter additional search criteria. The search criteria are like the top row of the Consumer Search criteria. Click the Search button.



Add New User

When a new Pre-ETS Consultant, Contractor Lead or Agency Lead is hired, this function can be used to register a new user. Required user registration information, must be provided in order to submit the request.

Agency Leads will be able to register a user within their Agency.

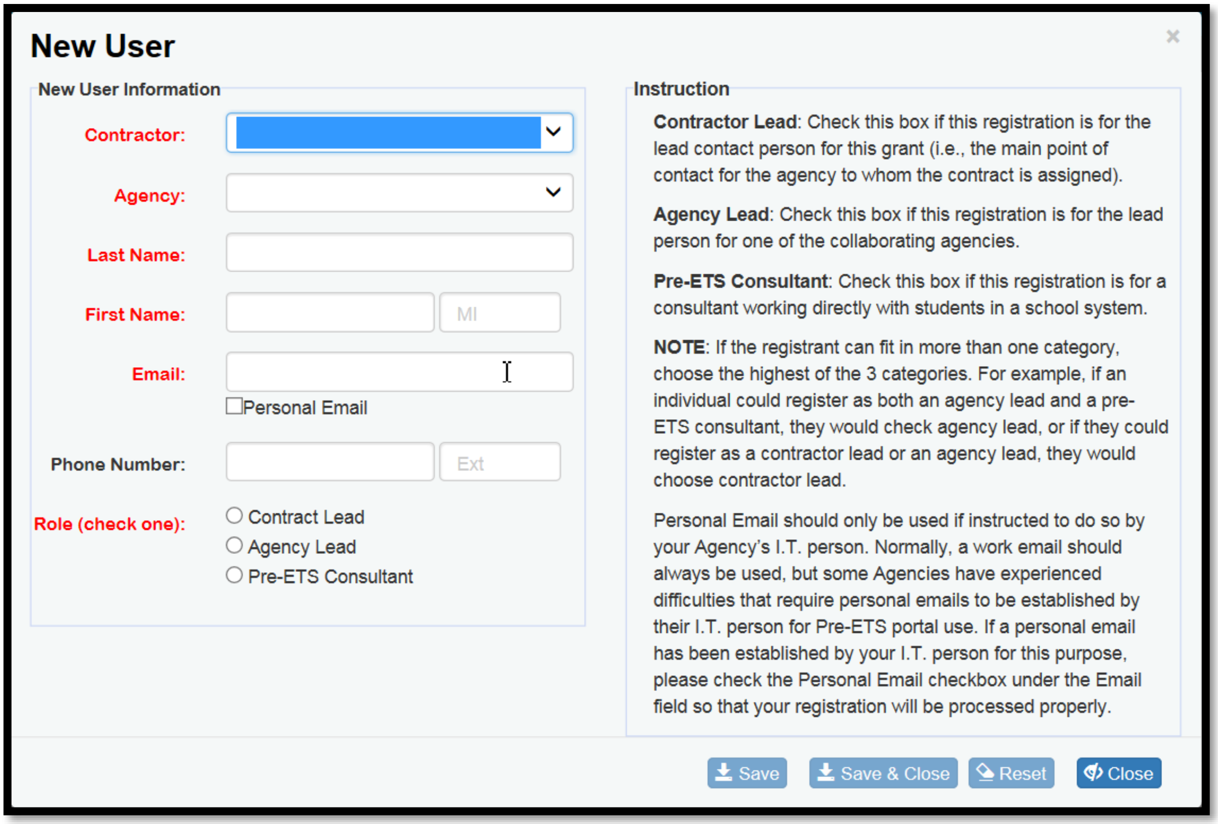
Contractor Leads will have the ability to register a user for any Agency within their Contractor Group.

VR Pre-ETS Administrators can register a user for any Contractor/Agency state-wide.

Note: If a user needs to be registered under more than one contractor, please email Fssa.Pre-Ets@fssa.IN.gov for assistance.

To add a new user, click the Add New User button at the top of the grid on the left-hand side.

The New User screen will then be presented. Fields in red font are required.



There are six required fields:

- Contractor
- Agency
- Last Name (enter the last name of the new user)
- First Name (enter the first name of the new user)
- Email (enter the email of the new user; it is important to ensure that the email is spelled correctly)
- Role (choose only one and if more than one role is appropriate choose the 'highest'; instructions for Role selection are provided on the right side of the screen)

Optional fields include: Middle Initial, Phone Number/Extension and Personal Email checkbox.

The Personal Email checkbox is only applicable to those agencies where issues prevent the use of the work email address. This is rare, and when it occurs a workaround has been identified in which a personal email (Gmail, Hotmail, etc. can be assigned by the Agency's I.T. person for Pre-ETS use.

- When a 'personal email' is used, it is important to check the Personal Email checkbox as special handling is required for these user registrations.
- If an email is entered with a domain such as Gmail, Hotmail, etc. a warning will be displayed if the Personal Email checkbox is unchecked. The warning will prompt the user "Are you sure this is not a personal email?"

- If it is not a personal email, click OK. The checkbox will remain unchecked, and you can proceed with entry.
- If it is a person email, click Cancel to automatically check the Personal Email checkbox, and you can proceed with entry.

If you encounter any issues with the user registration process, email Fssa.Pre-Ets@fssa.IN.gov for assistance.

Inactivate (user)

When an employee retires/resigns, transfers out of Pre-ETS service provision, or their employment is terminated, their Pre-ETS User ID should be immediately inactivated at the point in time that they are no longer allowed to work on Pre-ETS cases.

Contractor Leads, Agency Leads and VR Pre-ETS Administrators will have access to this functionality.

Contractor Leads will be able to inactivate any user within their Contractor group, except for their own user account.

Agency Leads will be able to inactivate any user within their Agency, except the Contractor Lead or their own user account.

VR Pre-ETS Administrators will have state-wide access to inactivate any user.

Caution: When this function is used, the inactivated user will immediately lose all rights to the Pre-ETS Vendor Portal. Do not use this functionality until the user is no longer allowed access to the system. For example, if a user has given two weeks notice and will be allowed to continue working on Pre-ETS cases for two weeks, do not inactivate their user ID until the end of the two week period.

A User cannot be inactivated while cases are still assigned. An error will occur if cases are still assigned; the message will instruct to use the Transfer Case functionality to transfer all of the user's cases. All cases must be transferred prior to inactivation, including both Primary and Secondary assignments.

- Transfer Case is available under the Administration menu. Click Administration, then Transfer Case. Transfer all of the cases from the user to be inactivated to the desired Pre-ETS Consultant(s). Then you will be able to proceed with the Inactivate User function.

Select the desired user record from the Results Grid and click the Inactivate button in the rightmost column.

A successful inactivation message or an error (if cases are still assigned) will be displayed.

A user cannot be reactivated without Pre-ETS Administration assistance. If you mistakenly inactivated a user, contact Fssa.Pre-Ets@fssa.IN.gov by email to request a reactivation.

Change Role

This function can be used to Change the existing user role to a new role (for example from Pre-ETS Consultant to Agency Lead or Agency Lead to Contractor Lead, etc.).

Contractor Leads will be able to change the role of any user within their Contractor group, except for their own user account.

Agency Leads will be able to change the role of any user within their Agency, except the Contractor Lead or their own user account.

VR Pre-ETS Administrators will have state-wide access to change the role of any user.

Select the user in the grid. Click the Change Role button. A pop-up display of User Roles will appear, with the current role already selected. Select the new role and click Save or Save and Close. A successful message will appear. Click OK.

Manage Case Assignments to additional Contractors/Agencies

This function can be used to assign additional contractors/agencies to a 'shared' consumer case. This is to be used when multiple agencies or contractors have an agreement to work with the same consumer. For example, one agency might work with the consumer during Summer school, and another during Fall to Spring semesters.

This function should not be confused with Transfer Case, which is to be used when a case is to be reassigned from one Contractor/Agency/Pre-ETS Consultant to another due to: retirement/attrition etc. of consultants within an agency, a consumer's move from one school district/area to a school district served by another Contractor/Agency, transfer from initial SOI VR registration to a Pre-ETS Contractor/Agency, etc.

This function cannot be used to assign multiple Pre-ETS Consultants within the same Contractor/Agency. The Transfer Case function should be used to reassign a case to another consultant within the same Agency.

Contractor Leads and VR Pre-ETS Administrators will have access to this functionality.

Manage Case Assignments to additional Contractors/Agencies has two functions: Assign and Unassign.

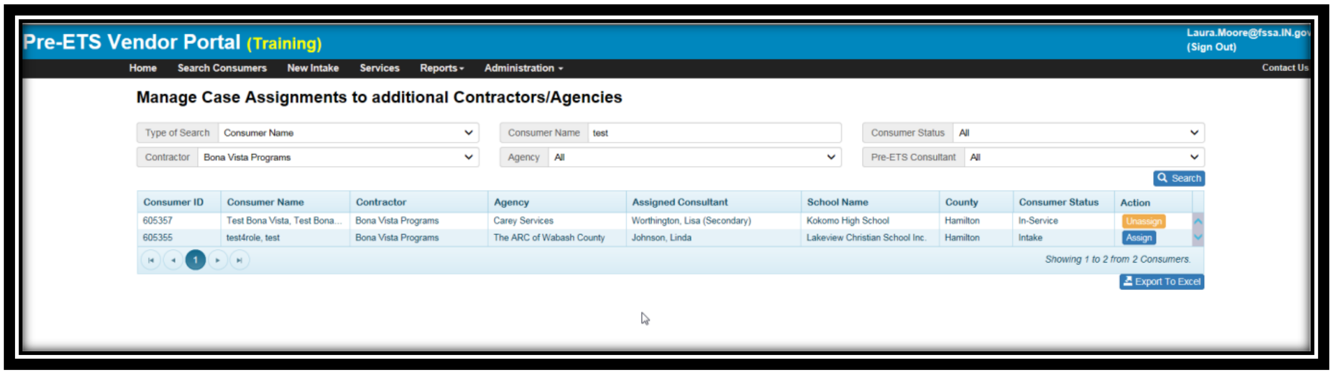
Results Grid

By default, the Results Grid will list the user's Contractor/Agency. Pre-ETS Administrators can select All or select the desired Contractor/Agency. Contractor Leads can select All for the Agency or select the desired Agency.

If desired to narrow the results, enter additional search criteria. Click the Search button.

The original case assignment (Contractor/Agency that entered the Intake) or the latest current assignment due to transfer of the original case assignment, is considered to be the "Primary" assignment (i.e., case owner). Any additional Contractor/Agencies assigned to the case are considered to be "Secondary" assignments.

When more than one Agency with a Contract or more than one Contractor is assigned to a consumer's case, the consumer's case will be listed multiple times in the grid, with Secondary assignment(s) displayed as such in parantheses next to the Assigned Consultant's name in the grid.



Assign

This function can be used by Contractor Leads and VR Pre-ETS Administrators to assign a Secondary assignment to any Contractor/Agency/Pre-ETS Consultant state-wide. This should of course be based upon prior agreement.

Select the desired Consumer Case from the grid results. Click the Assign button on the selected consumer row.

A pop-up screen will be presented: Assign Selected Case.

- The Consumer ID, Consumer Last Name and Consumer First Name will be displayed so that you can double check that the correct consumer case has been selected.
- Use the Select Agency/User drop-down list to select the Secondary Contractor/Agency/Pre-ETS Consultant.
- Click Assign. If the assignment is successful, a message will be displayed and you can Close the pop-up. If there is an error, a message will be displayed. Because this function cannot be used to assign multiple Pre-ETS Consultants within the same Contractor/Agency, the Agency of the selected case will not be included in the drop-down list.
- If you attempt to assign a Primary case to an Agency that already has a Secondary assignment, an error message will display indicating that the case is already assigned to that Agency.
- Upon successful assignment, the Secondary Agency will be able to:
- View Intake information. Secondary agencies will not be able to update the information (Intake information can only be updated by the Primary).
- View existing case Documents, Upload new Documents (and Modify or Delete their own Documents on the case)
- Enter services and View/Update/Delete their own services within normal rules. Secondary agencies will not be able to view the Primary Agencies services, and vice versa.
- Run reports that include the Secondary consumer case.

Unassign

This function can be used by Contractor Leads and VR Pre-ETS Administrators to unassign a Secondary assignment on any Contractor/Agency/Pre-ETS Consultant state-wide. This can be used when the Secondary Agency will no longer be working with the consumer (for example, if the consumer does not want to participate in a Summer school program) or when the case is pending closure due to aging out of the program, etc.

Select the desired Consumer Case from the grid results. Click the Assign button on the selected consumer row. A confirmation question will appear to make sure you wish to unassign the case. Click OK and the secondary assignment will be removed.

Change Consumer Case(s) Status

This function can be used to Inactivate or Reactivate a case. It is available only to Contractor Leads, Agency Leads and VR Pre-ETS Administrators. Either the Inactivate or Reactivate functionality will be available, depending upon the current Consumer Status. If the status is Intake or In-Service, the Inactivate functionality will be available. If the status is Inactive, the Reactivate functionality will be available.

Use the Consumer Status selection criteria to choose the desired consumer status.

Inactivate Case:

The inactivation functions will only be available for active cases in Intake or In-Service status. The Consumer Status search criteria can be used to select Intake or In-Service cases or Active (Intake and In-Service) cases.

This function will be used to specify that a consumer is no longer receiving Pre-ETS services. This is to be used to specify the date that all services ended, and the reason that the services ended.

The Inactivate Consumer function should only be used when all Pre-ETS services have ended and will no longer continue.

This function should *not* be used when a consumer is simply discontinuing Pre-ETS services with one Contractor or Agency in order to transfer to another Contractor or Agency where Pre-ETS services will continue (due to moving to a new school district for example). When this occurs, the Transfer Case function should be used.

Search criteria should be used to find the desired consumer(s), similar to Consumer Search. Search criteria will default to the user's Contractor and Agency. The Search Types drop-down list includes School, which might be useful after a High School graduation occurs. The School drop-down list will include only the schools covered by the selected Contractor.

The Case Status search criteria defaults to All, which includes Inactive. The inactive cases will be displayed at the bottom of the list, as they are not eligible for Case Inactivation. These cases will not include a checkbox as they are already inactive and thus ineligible for selection.

- Inactive cases are displayed in order to lookup an Inactivated Case and review the fields pertaining to the inactivation. At this time, this is the only location where the specific details of the inactivation can be reviewed.
- To remove the Inactive cases from the desired results, change the Case Status from All to In-Service or Intake. To search only for Inactivate cases, set the Case Status to Inactive.

Once all Search Criteria have been entered, Click Search to find your consumer case(s).

Only Primary case assignments will be displayed. Only Primary Contractor/Agencies (and VR Pre-ETS Administrators) can change the case status.

Results Grid

After clicking Search, a results grid will display. As with other results grids throughout the system, the results are sortable by column header.

Select the desired case(s) to be inactivated by clicking the checkbox in the leftmost column.

The drop-down selection of Inactivation Reasons includes:

- Aged out of Pre-ETS Program
- Dropped out of High School
- Failed to Cooperate
- Graduated from High School
- Moved out of State
- No longer interested in receiving services
- All Other Reasons

Entry fields include: End Date (required to show when services ended) and Inactivation Reason (required to identify why the consumer(s)' case is being inactivated, Comment (optional, to be used as needed to provide useful information).

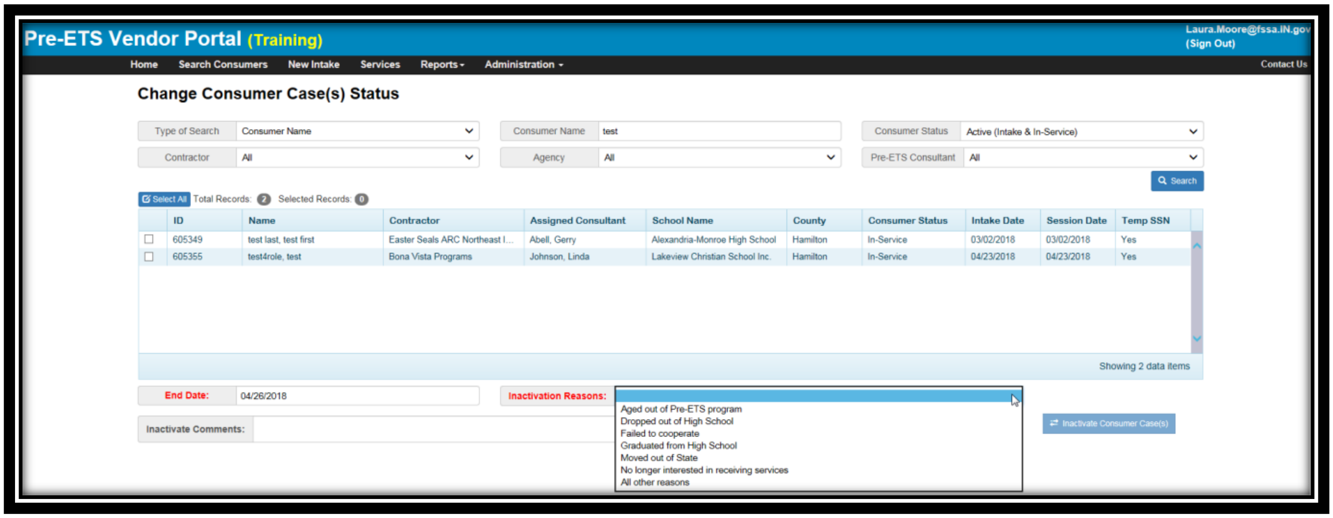
- When All Other Reasons is chosen as an inactivation reason, a conditionally required field will appear: Please Specify Other Inactivation Reason.
- The End Date will default to the current date, but is modifiable and can be back-dated.
- The End Date cannot be a future date.
- The End date cannot be earlier than the current federal reporting quarter start date (Jul 1 to Sep 30, Oct 1 to Dec 31, Jan 1 to Mar 31, Apr 1 to Jun 30).

More than one consumer case can be selected at a time. For example, at High School graduation time several consumer cases could be closed at the same time with the same End Date, Inactivation Reason of Graduated from High School, and same Comment. The End Date, Inactivation Reason (and Comment if entered) would be the same for all selected consumer cases.

> Care should be taken when closing multiple cases at the same time. In the example above, some students, *although they receive a certificate of completion, decide to stay in school for another year.* Those students, if under 23, are still eligible for Pre-ETS if desired and if so, their case would *not* be inactivated along with the other high school graduates.

Once the desired case(s) have been selected, click the Inactivate Consumer Case(s) button on lower right-hand side of the screen. A message will display when the cases have been successfully inactivated.

After a case has been inactivated the uploaded Documents are 'locked', meaning that the Delete button will be disabled for all but VR Administrators. Note: If a document needs to be deleted after inactivation, until the reactivate function is available, please email Fssa.Pre-Ets@fssa.IN.gov to request the deletion. Please include contract/agency, consumer name, and information regarding the document to be deleted.



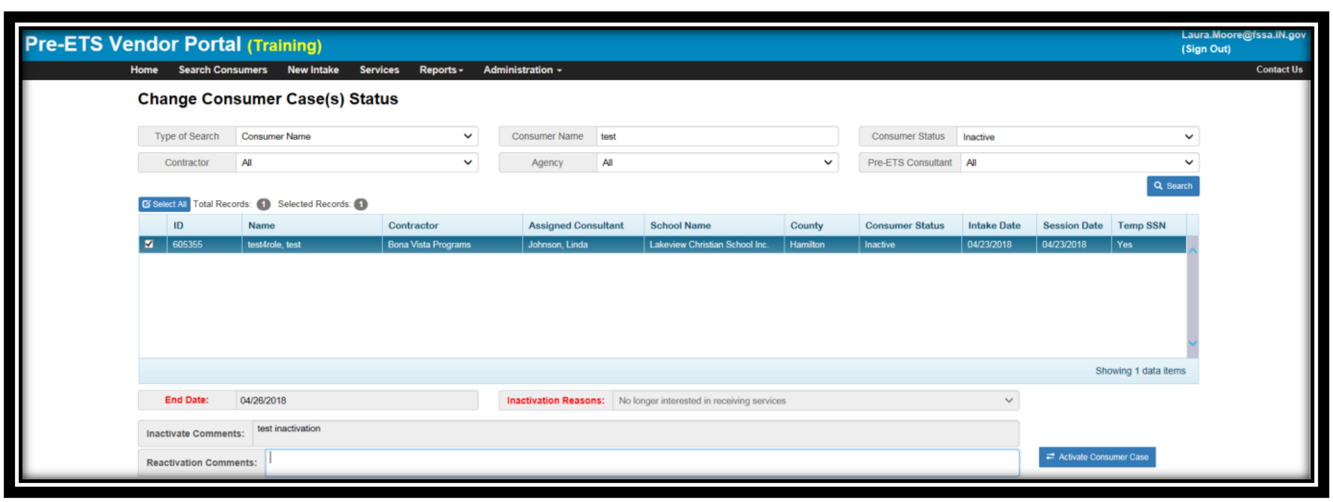
Reactivate Case:

The Case Status search criteria and results grid will function in the same way for reactivations as for inactivations. However, reactivation functions will only be available for Inactive cases. The Consumer Status search criteria can be used to select Inactive cases.

This function is useful if a case was mistakenly inactivated, or if a consumer decides to reinitiate Pre-ETS services.

When an Inactive case is selected in the grid, the prior inactivation information will be displayed, and a Reactivation Comments box and Activate Consumer Case button will be available. The comments are optional. Click the Activate Consumer Case button to reactivate the case.

When a case is reactivated, it will return to the status prior to inactivation. Possible case statuses upon reactivation include: Intake, In-Service, Interrupted Services.



State-wide Consumer Search

This functionality will be used by VR staff in order to identify that VR applicants are already registered in Pre-ETS and if so, the status of their case and whether or not services have already been provided. Only Primary case assignments for a consumer will be displayed.

This functionality will only be available to Pre-ETS Administrative and other VR staff. This functionality was designed to be used by VR staff who might also provide Pre-ETS services. These users will not have the authority to access/update Contractor's case information for existing Pre-ETS consumers.

Type of Search

There are three types of Consumer Searches: Consumer Name, School Name, and Temp SSN. When a Search Type is selected, the next field to the right will dynamically change to reflect the selected Type.

- For the Consumer Name search, a partial wildcard search is used which allows the user to search by Last Name followed by full First Name or followed by the starting characters of the First Name. When First Name is used, Last Name and First Name should be separated by a comma.
- Example: Smith,John or Smith,J).
- If desired the user can simply search for the full last name or all last names starting with the characters entered (Example: Smith or Smi). The less specific the criteria, the more results that will potentially be displayed.
- The Schools drop-down will present a full list of the schools covered under the Pre-ETS Contracts.
    - Note: The School Name and the Expected Year of Graduation that are displayed on Consumer Search represent the 'latest' (most current) school. The school that is displayed will be based on the school on the Post-Sec/Education Level page that has the most recent start date. That school and its expected graduation date will be displayed on Consumer Search.
        - Education level records include the school entered on the Intake page and any additional school entered on the Post-Sec/Education Level page. If no additional schools have been added, the Intake school and expected grad date info will be displayed on all searches.
        - When Type of Search = School is used for Consumer Search, the search will use the most current school.
- Temporary SSN – This will result in a list of consumers that had a temporary SSN created by the system due to the 'real' SSN not being available at the time of the intake. Temporary SSNs begin with '999' per RSA requirements. Note: The Temp SSN column in the results grid will show Yes or No. Yes indicates that a temporary SSN was assigned. No indicates that a 'real' SSN was entered.

An additional criterion of Consumer Status can be selected, otherwise this will default to All. The Consumer Status values include:

- Intake (Intake means that the consumer's Intake record has been entered, but no services have been entered)
- In-Service (In-Service means that the Intake and Service(s) have been entered)

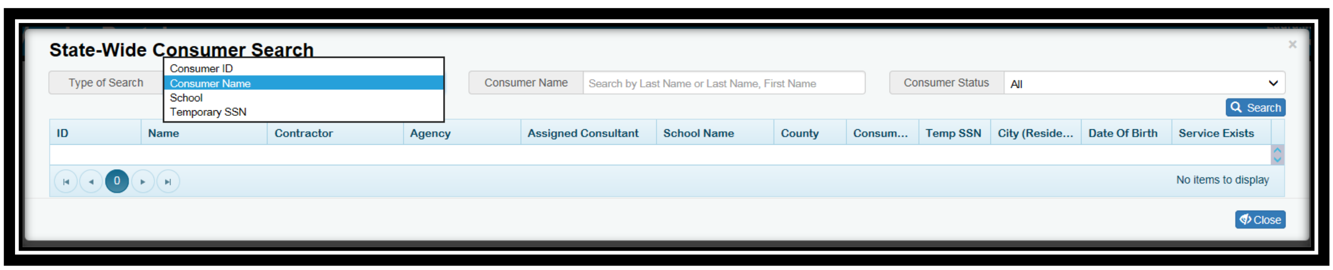
- Inactive (Inactive means that the consumers' services have ended, and as a result the consumer's Pre-ETS 'case' is closed). When this value is displayed, scroll to the far right of the results grid, which will show if Services Exist (Yes or No).
- Active (Intake and In-Service) (Active includes cases in both Intake and In-Service status)

Results Grid
Multiple pages may be returned in the results grid, or a message will be returned stating that no results were found.

Each column in the results grid is sortable and can be expanded or contracted by selecting and dragging the column header field separator. Left clicking in the column header will change the sort order. The first click will change the order to ascending; the second click will change the order to descending; and upon the third click the sort order will revert to the original sort order.

A scroll bar is located on the right side of the grid when several results records are returned.

Arrows and drop-downs at the bottom left of the grid can be used to navigate to a new results page in the grid or can be used to change the number of items displayed per results grid page.



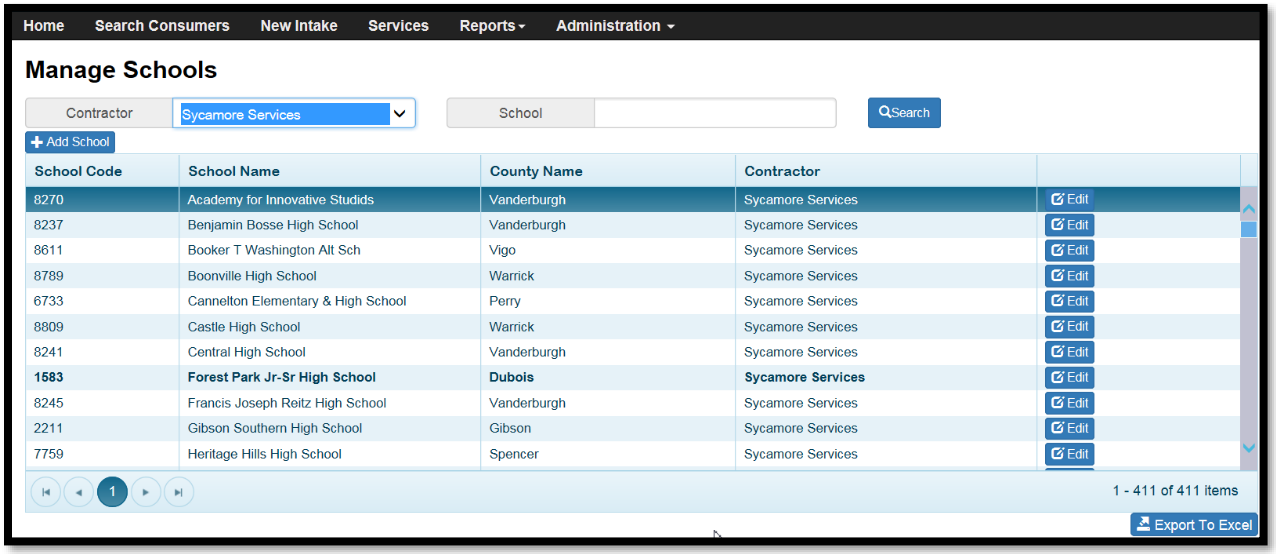
Manage Schools
Manage Schools has four functions: Add School, Edit information for the school or Assign an existing school to a Contractor, as well as Export to Excel.

Contractor Leads and VR Pre-ETS Administrators will have access to this functionality.

Results Grid
By default, the Results Grid will list the Contractor's schools. Pre-ETS Administrators can select All or select the desired Contractor.

Please note that the selected Contractor's schools will be displayed, as well as other schools already registered in the system that are *not* assigned to the selected Contractor. Schools already assigned to the Contractor will have an Edit button in the grid results. Schools that are not assigned to the Contractor will have an Assign button in the grid results.

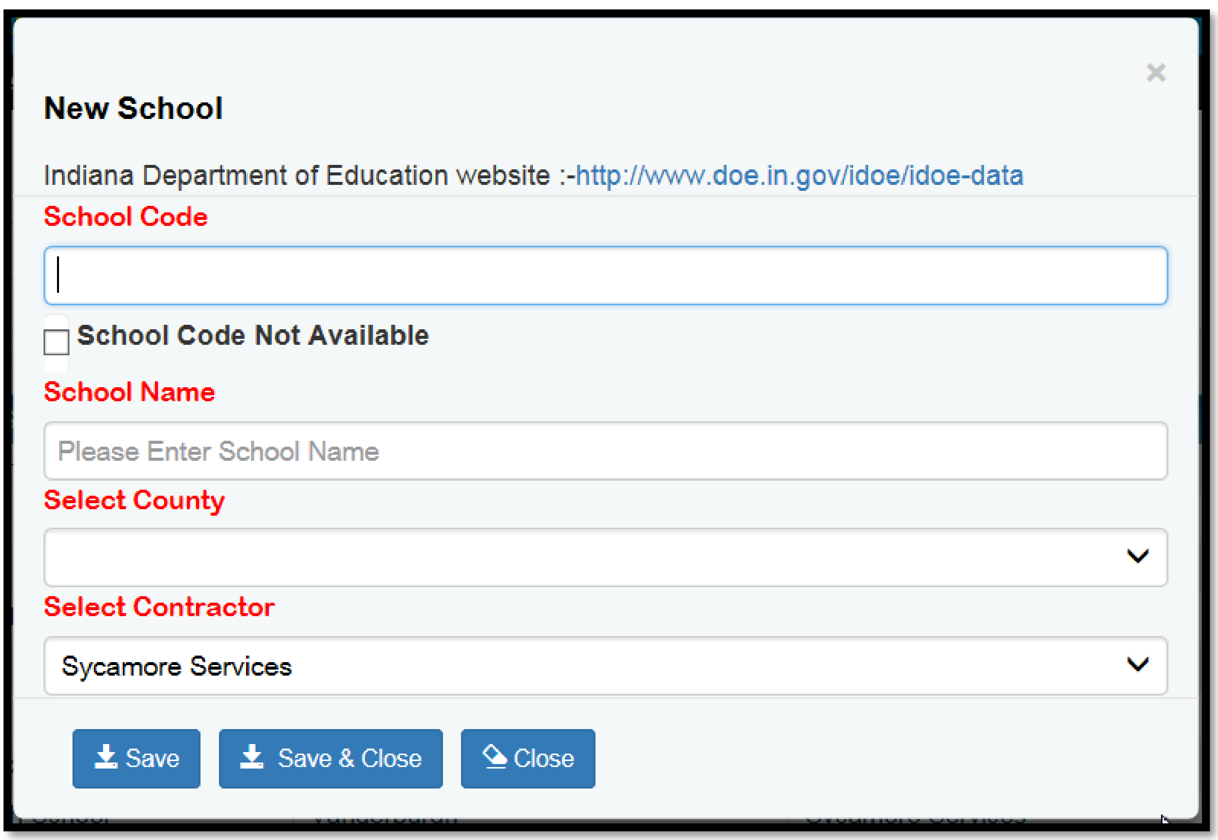
If desired, additional search criteria can be entered to search by School. Enter the first part of the school name and click the Search button. If the school is not found, use the Add School button.



Add School

To add a new school, click the Add School button at the top of the grid on the left-hand side. By default, the school will be assigned to the user's Contractor.

The New School screen will then be presented. Fields in red font are required.



There are four required fields:

- School Code
- School Name
- County
- Contractor

Optional fields include: School Code Not Available checkbox.

If uncertain of the school code or exact name of the school, this screen includes a link to the State of Indiana DOE website. On that website (listed under Popular Pages), is a link for the School Directory which is an excel file. There are two relevant worksheets that might contain the school you wish to add: PUBLIC and NONPUBLIC. You can use Find to search for your school in the appropriate worksheet.

Enter the correct school code, school name, and county per the DOE list. Using cut and paste (Ctl+C and Ctl+V) from the excel sheet to the screen for school code and school name fields will help to ensure that the fields are entered correctly.

If you cannot find your school in the DOE excel sheets, check the checkbox “School Code Not Available” and the system will assign a unique school code that is not already in use.

An error will occur if a duplicate school is entered for a Contractor. The error will prevent the entry of the duplicate.

Edit

This function allows the user to change an entry (for example, correct the school name spelling).

Assign

This function allows the user to assign a school that already exists in Pre-ETS to the selected Contractor. *Please use care to only assign schools that are in counties served by your contractor.*

Export to Excel

This function will export the grid results to an excel worksheet. Note: This will include *all* grid results which include schools not yet assigned to the selected Contractor. You may wish to filter or modify the worksheet to include only the selected Contractor’s schools.

DWD School-Based Documents

This function is used for VR Pre-ETS administration of SOI DWD JAG Pre-ETS. DWD school-based documents are not consumer-specific.

Only VR staff will have access to this functionality.

DWD School-Based Documents functionality is similar to the Documents screen, but has only two available functions: Upload DWD Document and View. View is available when the documents result set is presented.

Normally, these documents will be uploaded via a batch system interface with SOI DWD JAG.

Users will not be able to modify or delete documents that have been provided via the SOI DWD JAG interface.

Results Grid

By default, the Results Grid will list All Counties and All Schools unless other search criteria are entered. The sort order of the results is School within County.

Manage Reference Materials

Only VR Pre-ETS administration staff will have access to this functionality.

This function is similar to the Documents screen, except that Reference Materials documents are not consumer-specific. Using this screen, administrators can Upload New Documents or Modify, Delete, View existing documents.

Modify does not allow changes to the actual document, but rather to the document name, comments, and pin sequence. Users can delete existing documents and replace outdated documents with an updated version by using the Upload New Document function.

View allows users to launch and review an existing document.

Fiscal

Generate Invoice

This function will allow users to view a preview of a generated invoice, and/or to generate and submit an invoice within the Vendor Portal system.

The Invoicing function will be available to Contractor Leads, Agency Leads, and VR Pre-ETS Administrators.

Agency Leads can view their Agencies statistics. Only a Contractor Lead can generate and submit and invoice.

For a preview of the invoice, select the desired date range. *Only un-invoiced and unpaid service sessions within the date criteria will be included.*

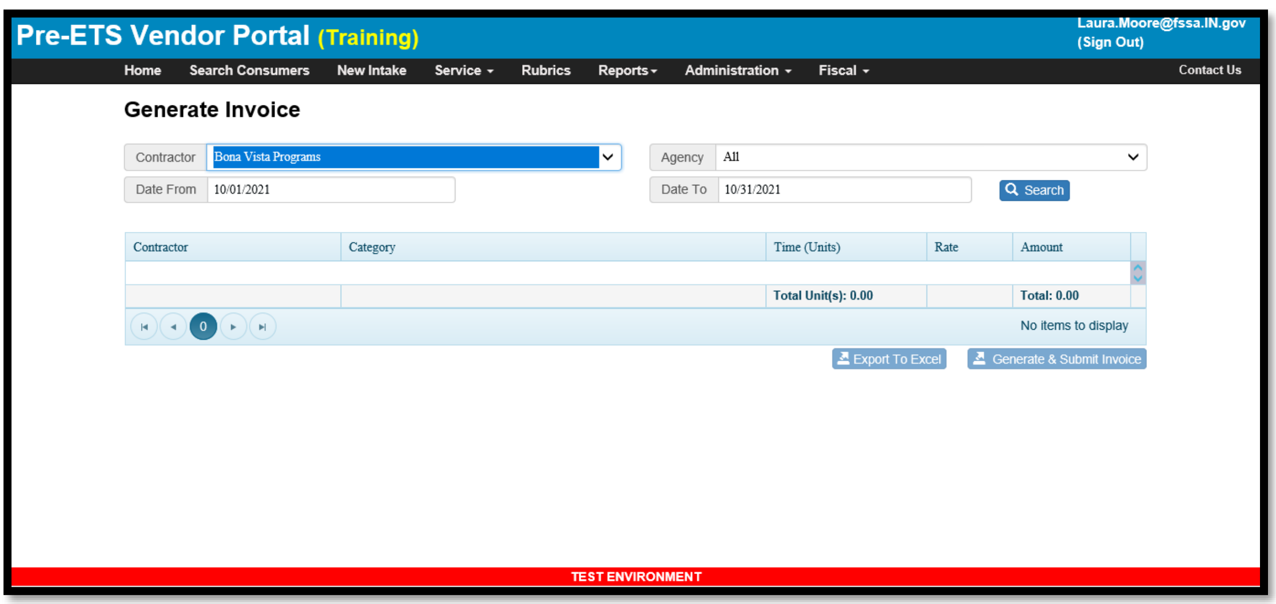
This function is only available with 'new' contractor rates (with Date From 01-01-18 for most Contractors and from 10-01-18 for contractors with later contract renewals with new rates).

Typically, the time period will be for the prior month. Once all service and stipend sessions have been entered for the month, the invoice can be run for the time period, exported to excel and reviewed/approved prior to generation/submission of the invoice.

When ready to submit the invoice, run for the desired time period and click Generate & Submit Invoice.

- A warning message will be displayed indicating that the action cannot be reversed. The user can cancel from the action or proceed.
- Once the user clicks OK to proceed, all service and stipend sessions within the selected date range will be marked as "Invoiced" and will no longer be available for inclusion in future invoices.

- The generated invoice can be saved for record-keeping and/or inclusion of supporting documents with submission of the State claim form.
- The Vendor Portal invoice does NOT automatically submit the invoice to the State for billing nor does it replace the State required claim form.
- The values from the invoice can be copied/pasted into the corresponding Claim form line items.
- The invoice is an aggregate of the Service Sessions Details for Monthly Billing report, provided in the format of the State claim form.
- The invoice functionality will facilitate invoice review/approval by the State, accuracy of claims and federal reporting.
- Note: The monthly invoice can be compared to the Service Session Details for Monthly Billing report prior to generating/submitting the invoice.
- The Service Session Details for Monthly Billing report will show all service sessions for a period, including those that have already been marked Invoiced or Paid.
- In comparison, the invoice will only include the aggregate of service sessions in the period that are un-invoiced/unpaid. Therefore, to compare, do so before the invoice generated/submitted. The *totals* should match.
- Stipends can have variable hourly rates per employer/position for different students, and therefore on the invoice stipends are shown with Units = 1, and the Rate and Amount will show as the aggregate of all total amounts for all stipend sessions in the date range.
- Individual stipend session information is available on Stipend Search which can be filtered by In-Process (i.e., uninvoiced/unpaid sessions) and date range to confirm the total amount to be used on the invoice.



Invoice Reconciliation (under construction, not yet available)

This functionality will be used by VR Pre-ETS Administrators in order to identify Pre-ETS invoices that have been paid. This information will be used for federal reporting, as well as to apply business rules to

Invoice and Service data (paid invoices/services within those invoices cannot be changed after payment).

This functionality will not be available to Contractor Leads or Agency Leads.

<Insert Invoice Reconciliation screen shot here>

Shortcut Keys

Throughout the system, shortcut keys are available. These are combinations of keys that will allow the user to 'jump to' or perform the desired function without having to navigate to the button.

The shortcut keys are listed by screen below:

Home Page

ALT + R = Go to Search Consumer

ALT + N = Go to New Intake

ALT + S = Go to Services Search

Consumer Search

ALT + R or focus on any Search field and press ENTER = Search

ALT + N = Go to New Intake

ALT + I = View/Modify Intake

ALT+M = Add/Modify Services

Alt + G = Set cursor focus on Grid

Intake

ALT + S = Save

ALT + I = Save and Close

ALT + L = Delete *[Note: The Delete intake function is restricted to VR Administrators.]*

ALT + 0 = Close

Transfer Case

ALT + R or focus on any Search field and press ENTER = Search

ALT + S = Transfer

Service Search

ALT + R or focus on fields and press ENTER = Search

ALT+M = to Add/Modify Services

ALT + N = Create New Service

Alt + G = Set cursor focus on Grid

Service Session

ALT+ U = Go to Add Services / Select Services pop-up screen

ALT+K = Go to Add Consumers / Select Consumers pop-up screen

ALT + S = Save

ALT + I = Save and Close

ALT + L = Delete

ALT + 0 = Close

Select Services Pop-up

ALT+P = OK

ALT + 0 = Close

Select Consumers Pop-up

ALT + R or focus on fields and press ENTER = Search

ALT+P = OK

ALT + 0 = Close

Administrative Menu / Manage Users

Alt + R = Search

Alt + G = Highlights first record on results grid with focus on the Inactivate button

Alt + N= Add New User

ALT + S = Save

ALT + I = Save and Close

ALT + 0 = Close

Administrative Menu / Manage Case Assignments to additional Contractors/Agencies

Alt + R = Search

Administrative Menu / Change Consumer Case(s) Status

Alt + R = Search

Alt + S = Inactive Consumer

Alt + G = Highlights first record on results grid with focus on the Inactivate button

Administrative Menu / State-Wide Consumer Search

Alt + R = Search

Alt+ O= Close

Reports Menu / Service Session Details for Monthly Billing

Alt + R = Search

Administrative Menu / Manage Schools

Alt + R = Search

Alt + N= Add New School

ALT + S = Save

ALT + I = Save and Close

ALT + 0 = Close

Alt+M =Edit *or* Assign selected school (based on the button displayed for the selected record)

Upload Documents

Alt + U = Upload Documents

Alt + G = sets focus on Action column in the results grid for the selected record and then the user can press tab key to focus on Modify and other buttons

Upload/Modify Popup

Alt + S = Upload or Save (if document type, document name, or comment was modified)

Alt + I = Upload & Close or Save & Close (for field modifications as listed above)

Alt + L = Delete

Alt + O = Close

Menu ToolBar

Alt + Q = Set Focus on Home in Menu toolbar

Reports Menu / Service Session Details for Monthly Billing

Alt + R = Search