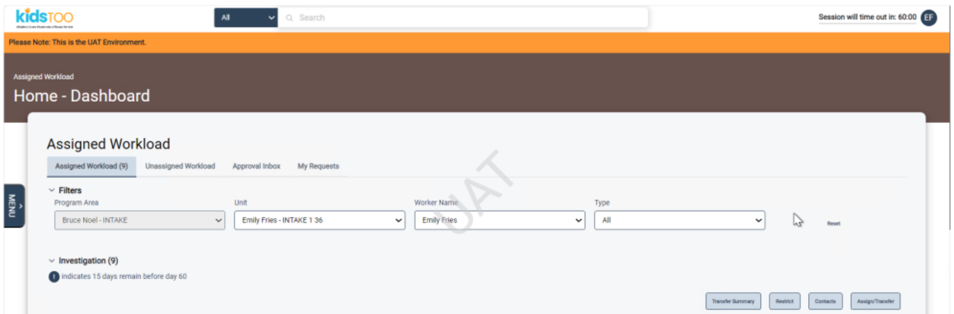
JOB AID: ENHANCED FUNCTIONALITY

Contents

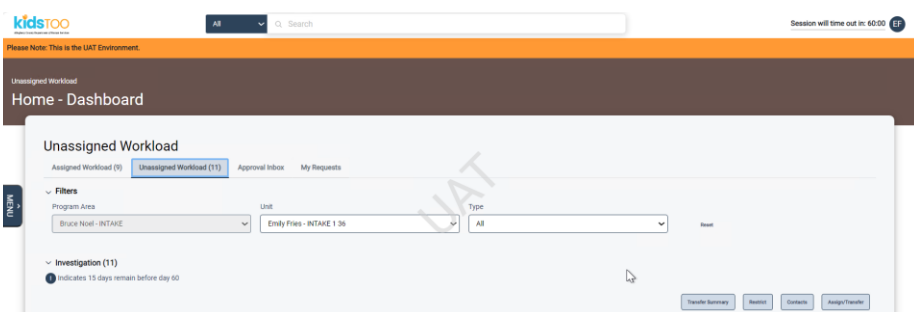
Redesigned Dashboard/Landing Page

Upon login, users will be navigated to the Dashboard where they can view their Assigned Workload, Unassigned Workload, Approval Requests etc. based on their role. To switch views, the user can click any of the tabs on the Dashboard screen (Assigned Workload, Unassigned Workload, Approval Inbox, My Requests).

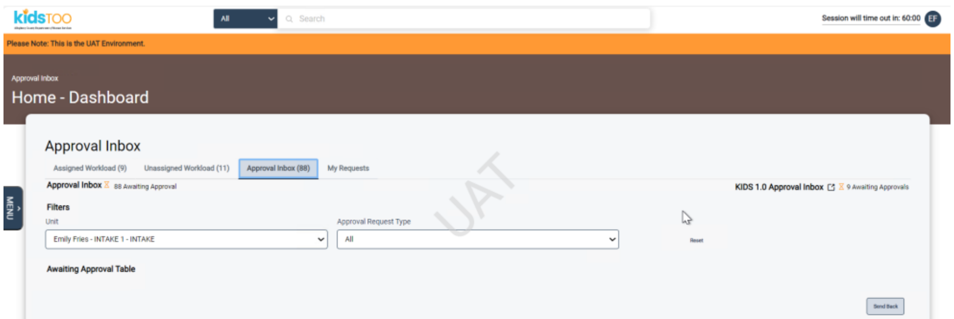
Assigned Workload: This shows the referrals assigned to a user. Based on user's role they will be able to see another user's workload. Using Program Area, Unit and Worker dropdowns above the grid.



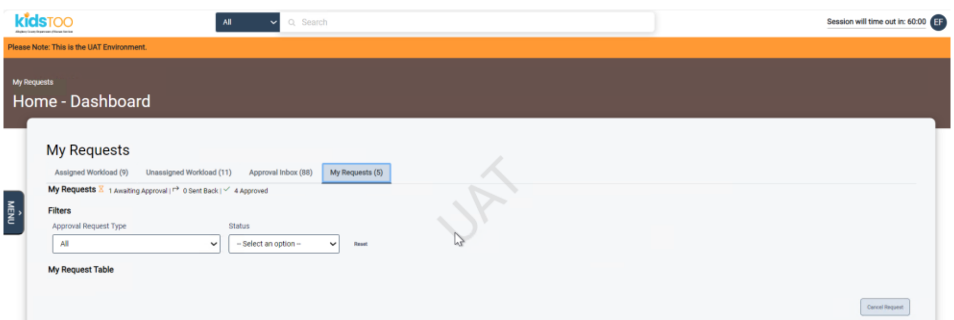
Unassigned Workload: The referrals that are not assigned to any worker but rather just assigned to either unit or program area will land in this tab. This tab will be visible only to Supervisors, Clinical Managers, RODs, and Specialists.
To view the referral assigned to a unit within a Program Area, select the corresponding unit from the Unit dropdown.
To view the referral assigned to a program area (without any unit assignment), select the Unassigned Inbox in the Unit dropdown.



Approval Inbox: This tab will also be visible only to Supervisors, Clinical Managers, RODs and Specialists. This is where all the approvals sent to them will reside. Users will have the ability to filter the approval inbox by Unit and Approval Type.



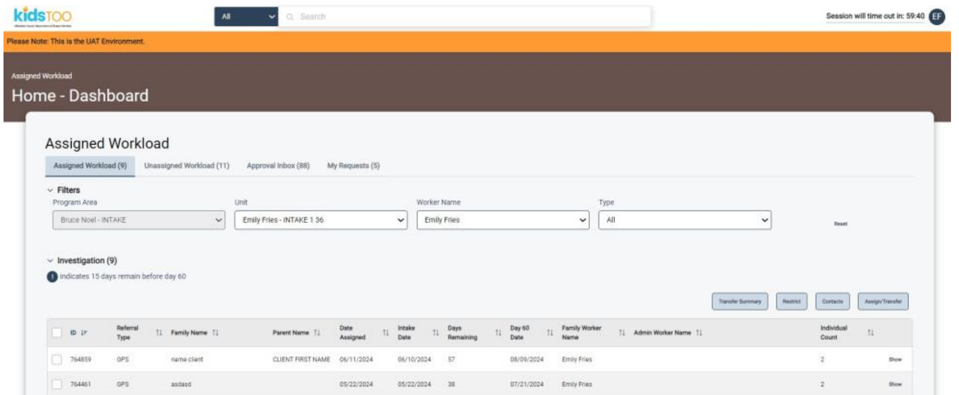
My Requests: This tab will display all the requests sent for approval by the logged in user. The requests that are approved will stay on this tab for 10 days and then will be removed after that.



Assigned Workload Enhancements

In KIDSTOO, the Assigned Workload Dashboard includes additional column names such as Family Name, Parent Name, Date Assigned, Intake Date, Days Remaining (with 15 Days Remaining indicator), Day 60 Date, Family Worker Name, Admin Worker Name, Individual Count, etc.

Commented [CP1]: @Goodwin, Caroline if the target audience of this document is all INV users then they don't see Call screening Review tab. Can we take a screenshot from UAT with 'Emily Fries' as logged in user?

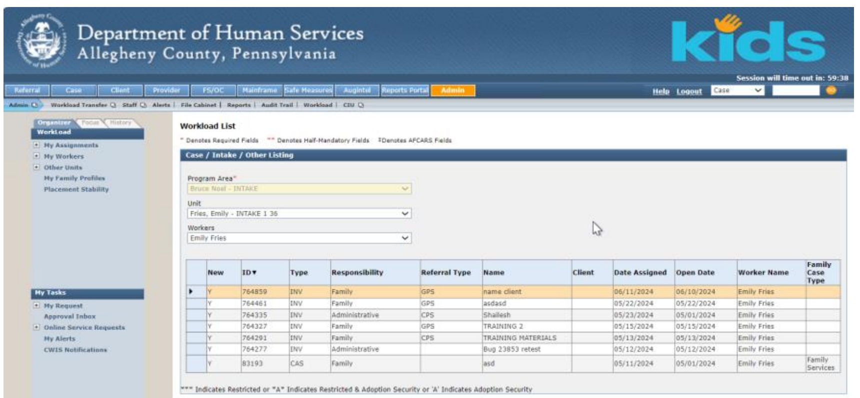


Commented [CP2]: Can we change this screenshot also, please?

Commented [CP3R2]: Also since these are INV referrals we are talking about, let's take the screenshot from that grid.

In Legacy KIDS, the column names only include New, ID, Type, Responsibility, Referral Type, Name, Client, Date Assigned, Open Date, Worker Name, and Family Case Type.

Commented [CP4R2]: We can then call out enhancements in INV grid - Family Name, Parent Name, Days Remaining (with 15 days remaining indicator), Day 60 Date, Family Worker Name, Admin Worker Name, Individual Count etc.
You can find these details in the UST for INV dashboard.



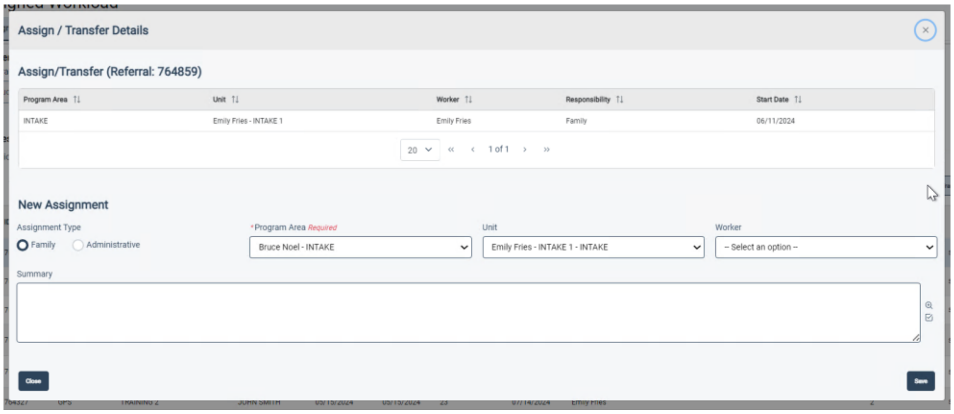
Commented [CP5]: Take this screenshot also from Emily's login in legacy.

Assign/Transfer Functionality

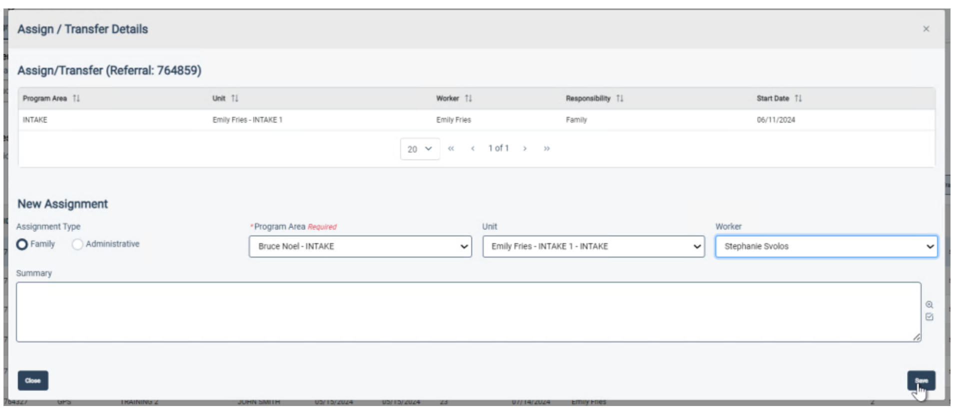
Ability to End-Date Admin Assignments, Transfer Summary Popout (on dashboard)

1. Select a referral from the Dashboard using the checkbox.

2. Click the Assign/Transfer button in the top right of the grid.

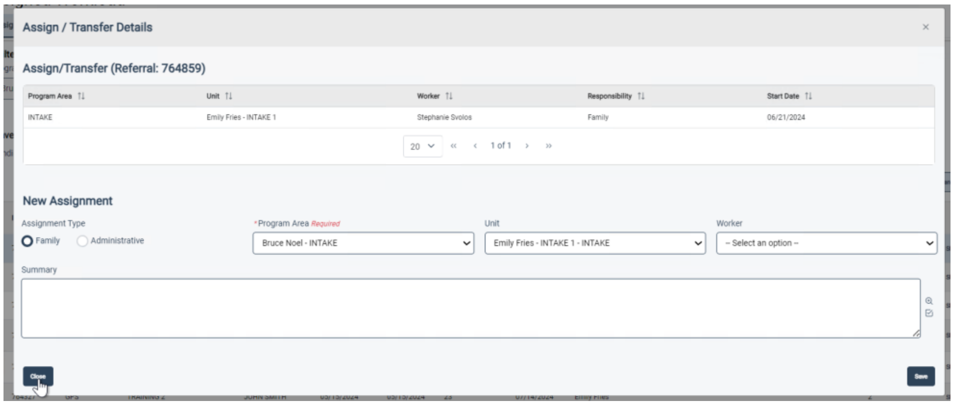


3. Select the Assignment Type, Program Area, Unit, and Worker.

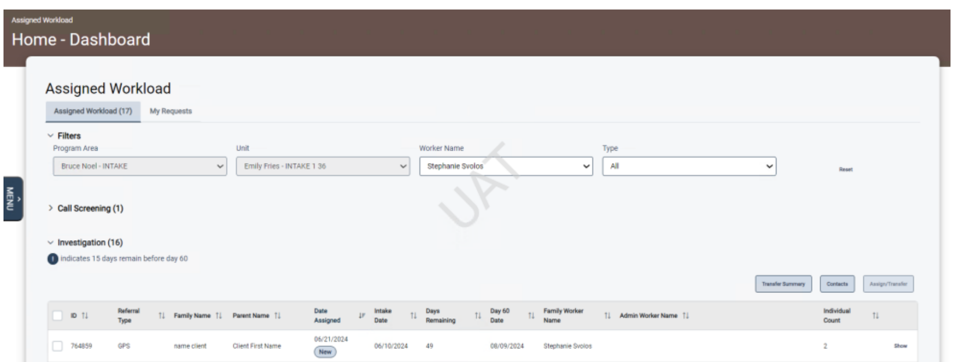


4. Click the Save button.

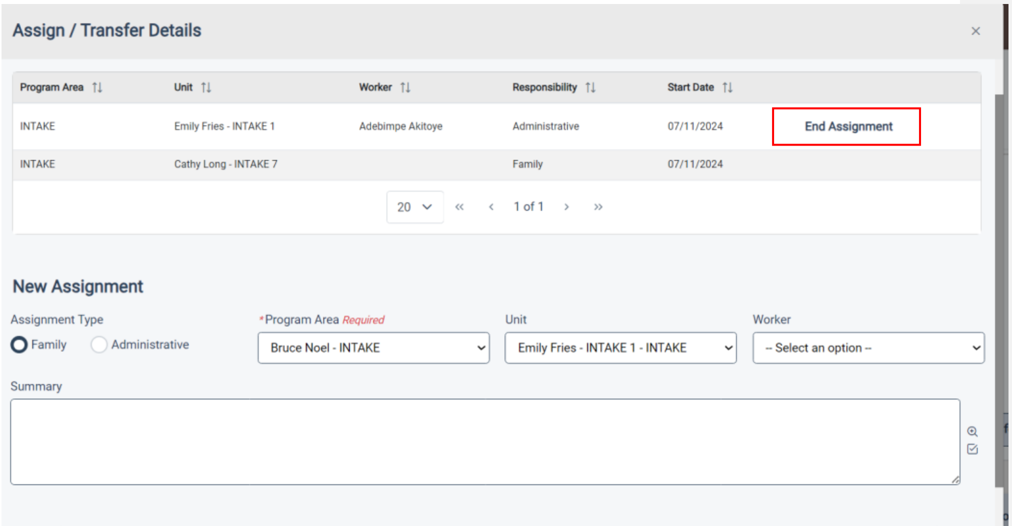
5. A confirmation popup will appear. To confirm, click the Yes button.



6. The Assign/Transfer Details popup will remain open where users can view the current assignment and assignment history.
7. To go back to the Dashboard, users click the Close button.

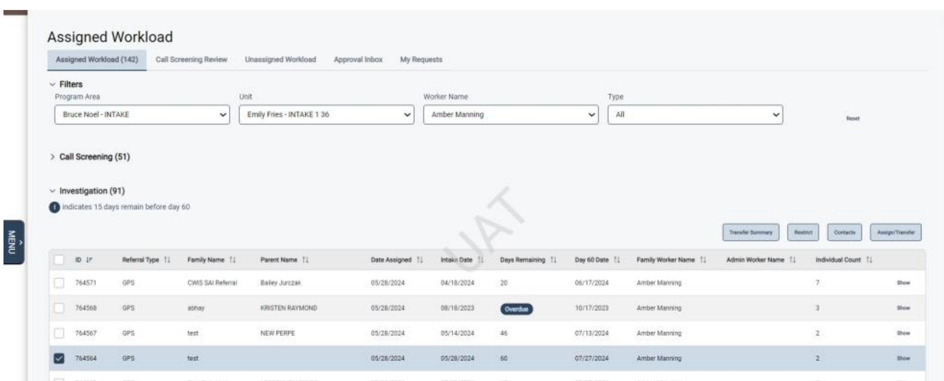


8. The assigned worker will then have the referral in their Assigned Workload with a New tag in the Date Assigned column.
9. Users will have the ability to make multiple Admin assignments. And creating a new admin assignment will not auto-end date previous admin assignment.
10. Users can manually end date the Admin assignment using End Assignment button within grid for admin assignments.

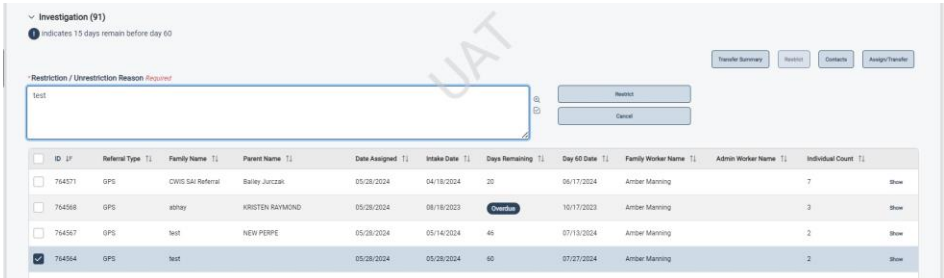


Restrict Functionality

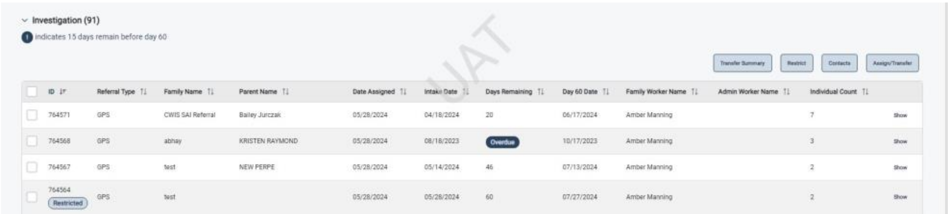
Users can restrict referrals from the Dashboard.



1. The user selects a referral using the checkboxes in the leftmost column.
2. The user then clicks the Restrict button and the below Restriction/Unrestriction Reason box appears.



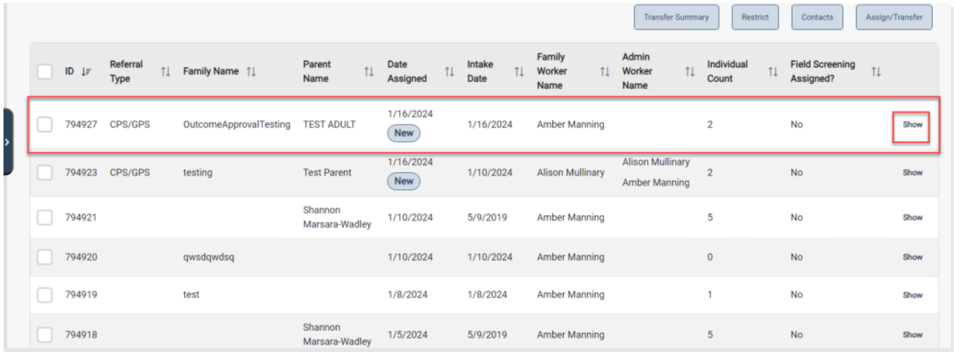
3. The user puts a restriction reason in the textbox and then clicks the Restrict button.



4. A Restricted tag will then appear below the referral ID in the grid.

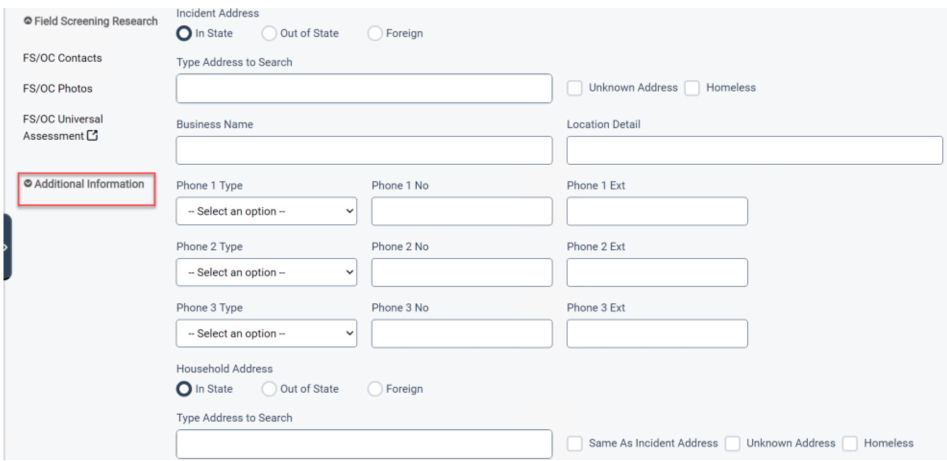
Putting Referral in Focus from Dashboard

Once the user navigates to the Dashboard, the user can see the list of referrals getting displayed in the grid. To select any referral and view it the user can select the show button which is present beside each referral in the grid.



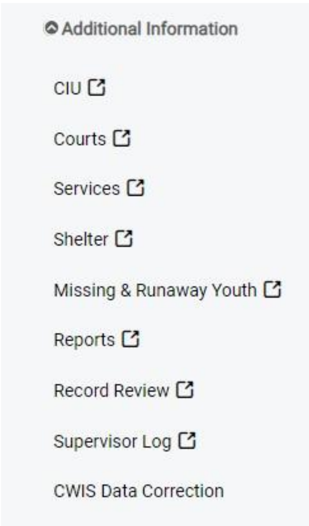
Left Navigation – Additional Information

The Left Navigation gives users a recommended screen flow, so they know which screens they have or have not completed. Additionally, users are able to move between screens without using dropdowns. Within the left navigation there is a section labeled Additional Information. It is collapsed by default but can be expanded by clicking the arrow. The menu will then appear, and users can use any of the links below. The selected link will open in a new window.



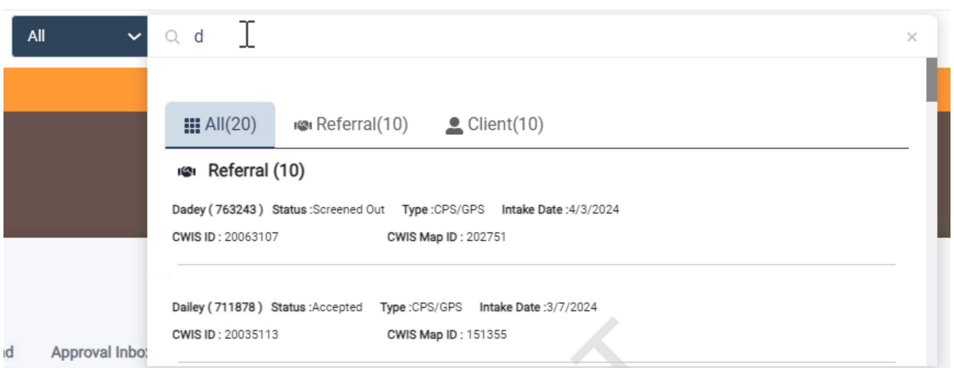
To view the options present under the Collapsed View, click on the arrow to open and view the options available.

Commented [CP6]: @Goodwin, Caroline Can we add some details about left navigation itself first? It might be there in our CS documents. If not, we can write 2-3 lines about how left navigations makes it easier to navigate between screens and provides a structure to the workflow.

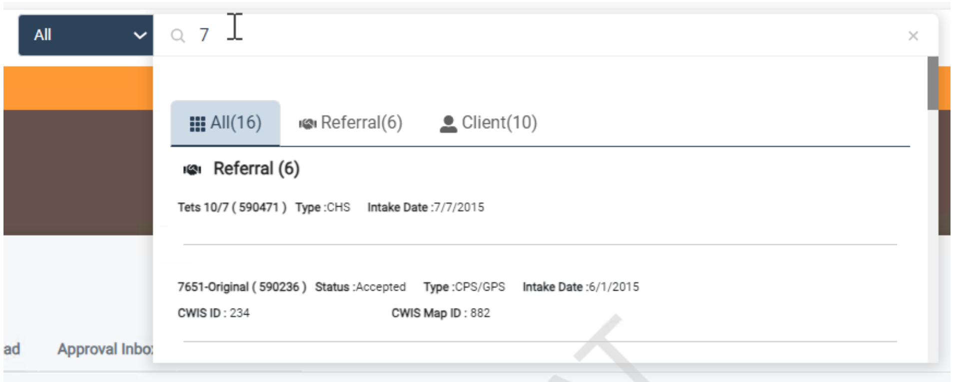


Search – Universal and Advanced

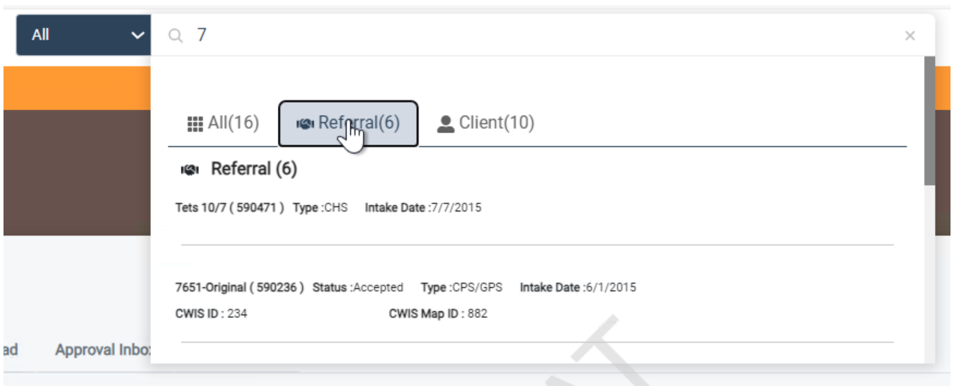
There are two main ways for users to complete a search. At this stage, users are only able to search for Referrals and Clients but as functionality is added to KIDSTOO, there will be more options available. At the top of the screen there is Universal Search which is the quickest and easiest search option.



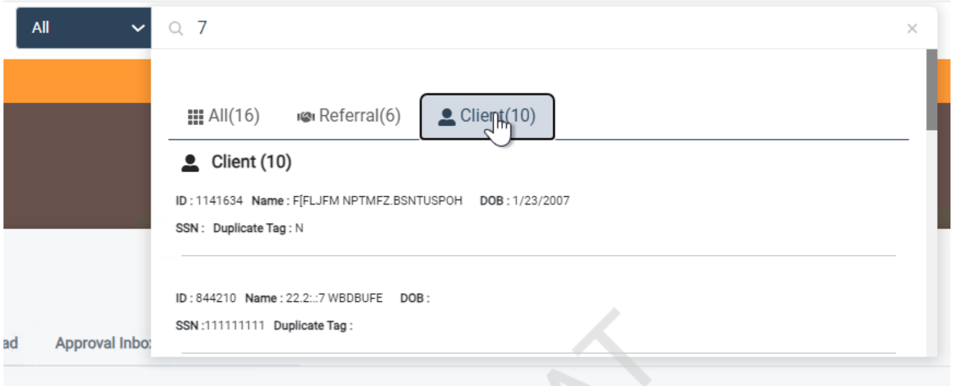
1. Users can enter any number of characters (even 1) and return results.



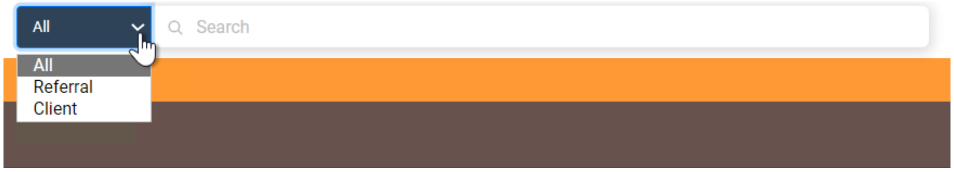
2. Users can also enter numbers, such as referral IDs.



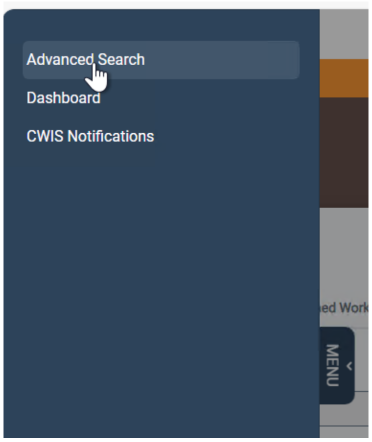
3. If the user is searching for a referral specifically and want to filter out the other results, they can click on the referral tab within the search dropdown.



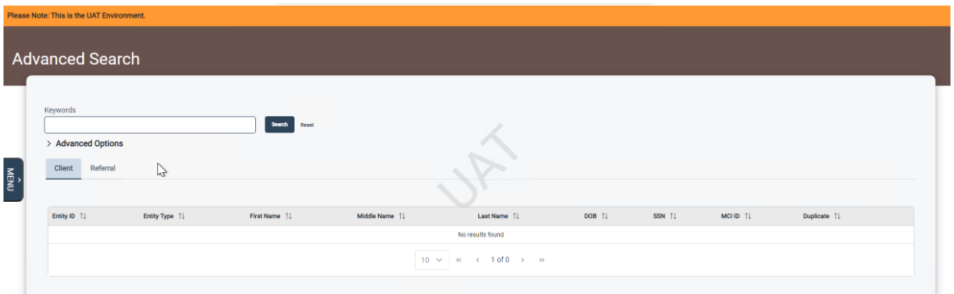
4. Users can do the same for clients.



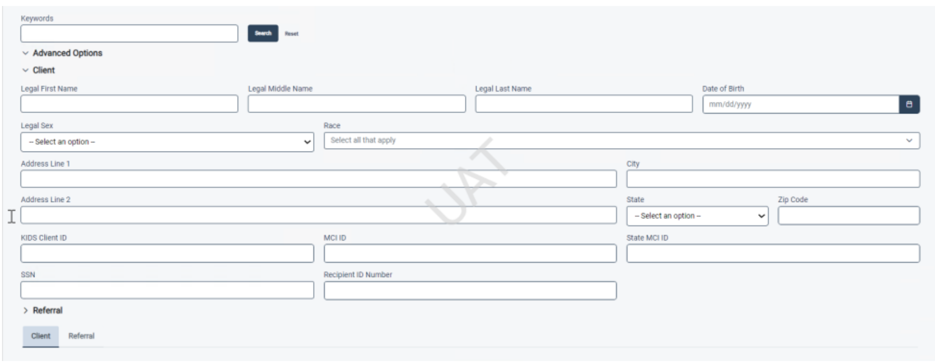
5. If the user would like to filter the results before searching, they can also use the dropdown to the left of the search bar.



1. To access Advanced Search, users need to click on the floating Menu button.

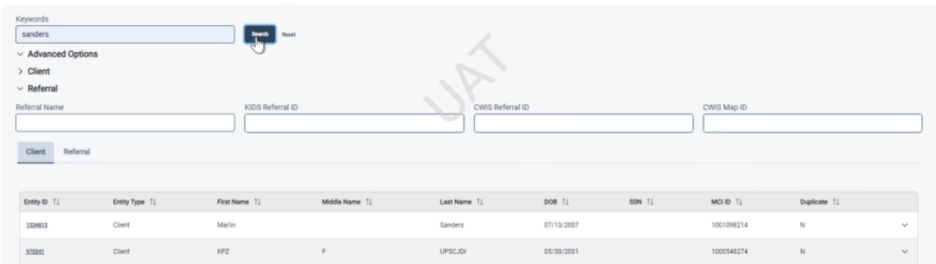


2. The Advanced Search screen will open as shown above.

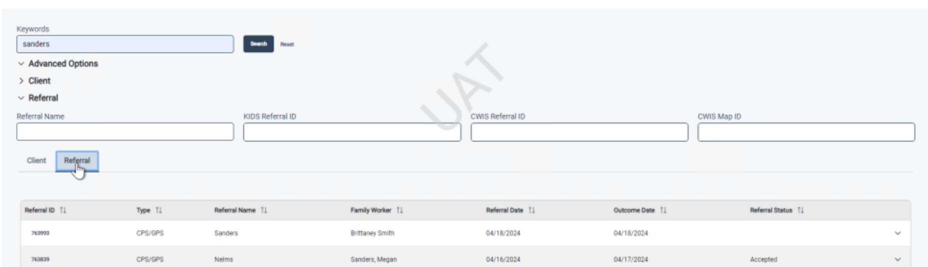


3. Using the arrow to the left of Advanced Options, users can open the collapsed section.
4. Within that collapsed section there is also a section for Client which can be opened, and the above fields are available.

5. Additionally, there is a section for referral information if the user is trying to search for a referral.



6. To search using keywords, the top search box can be used. The search results are defaulted to show the Client tab.

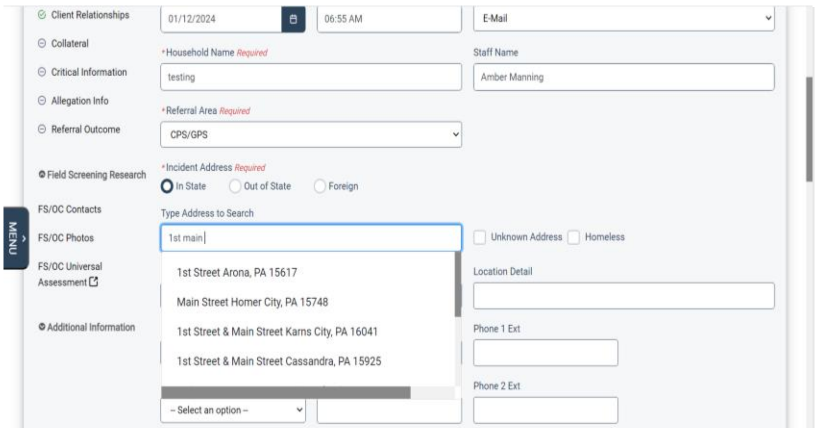


5. To view Referrals, the Referral tab must be opened.

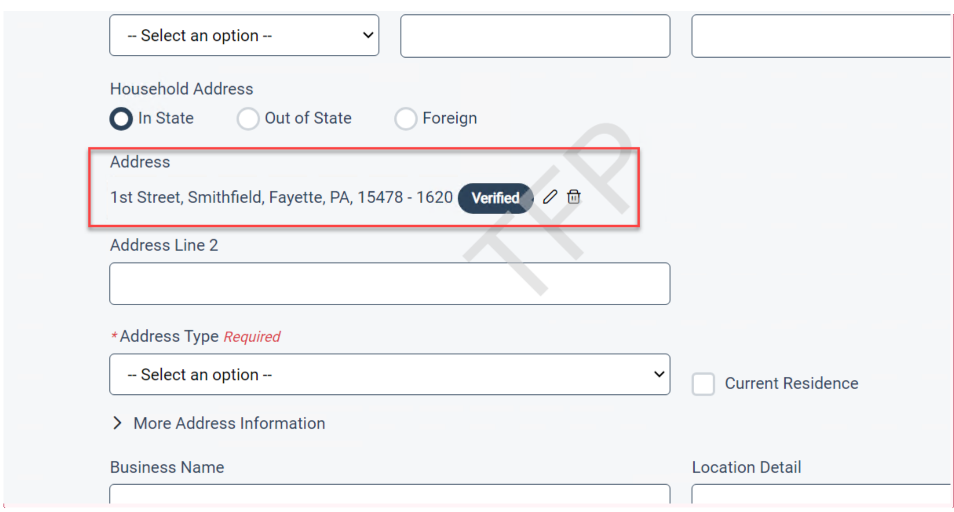
Auto Complete Address Control

The auto-complete functionality is present for all address search fields.

When the user types part of an address, minumum 5 characters, the related address suggestions are displayed in the drop down shown below.



The user can select any of the values displayed in the drop down. Once the address is selected, it will be displayed with the Verified tag.

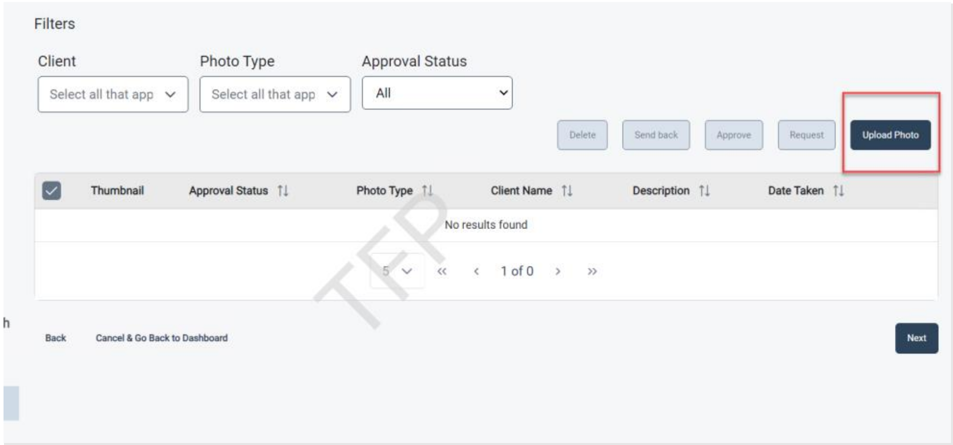


Commented [CP7]: Can we please add details about what edit and bin icon does? There seems to be some confusion around it so it's a good to have info in the training doc.

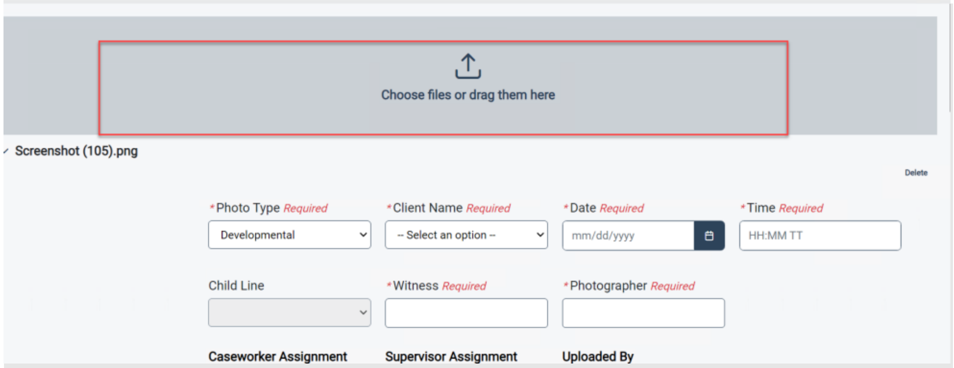
Pencil and trashcan icons are shown to the right of the address for the editing and deletion of addresses. When a user clicks the pencil icon, they are able to make edits to the previously saved address. If a user would like to completely clear the address, they can click the trashcan icon and the address will be removed.

Photos - Bulk Upload

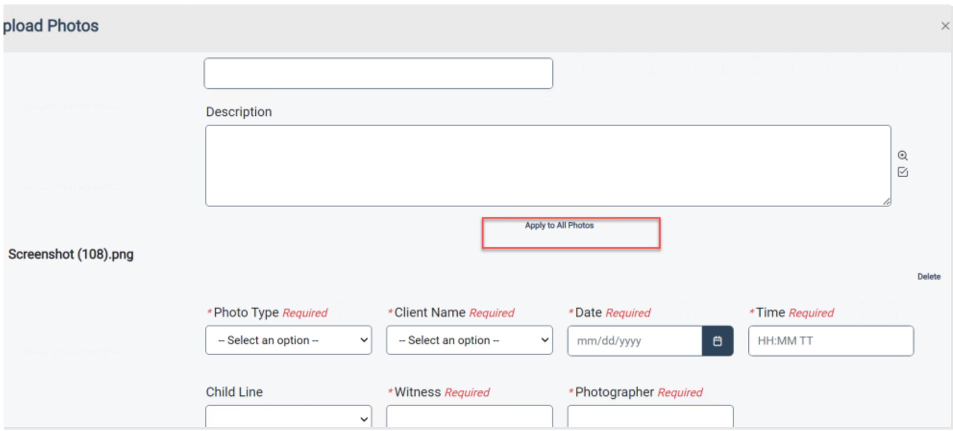
On the photos screen, there is the ability to upload photos using the Upload Photo button.



The user can choose a file by clicking in the field or dragging and dropping files into the section. Once the photos are selected, the user can fill in the required fields below.

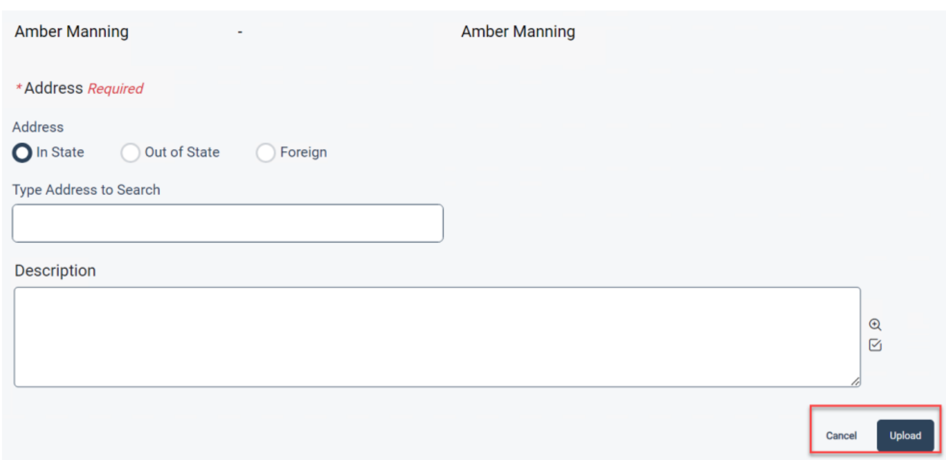


If the user selects more than one photo to upload simultaneously, they can click Apply to All Photos to apply all entered details to all photos.



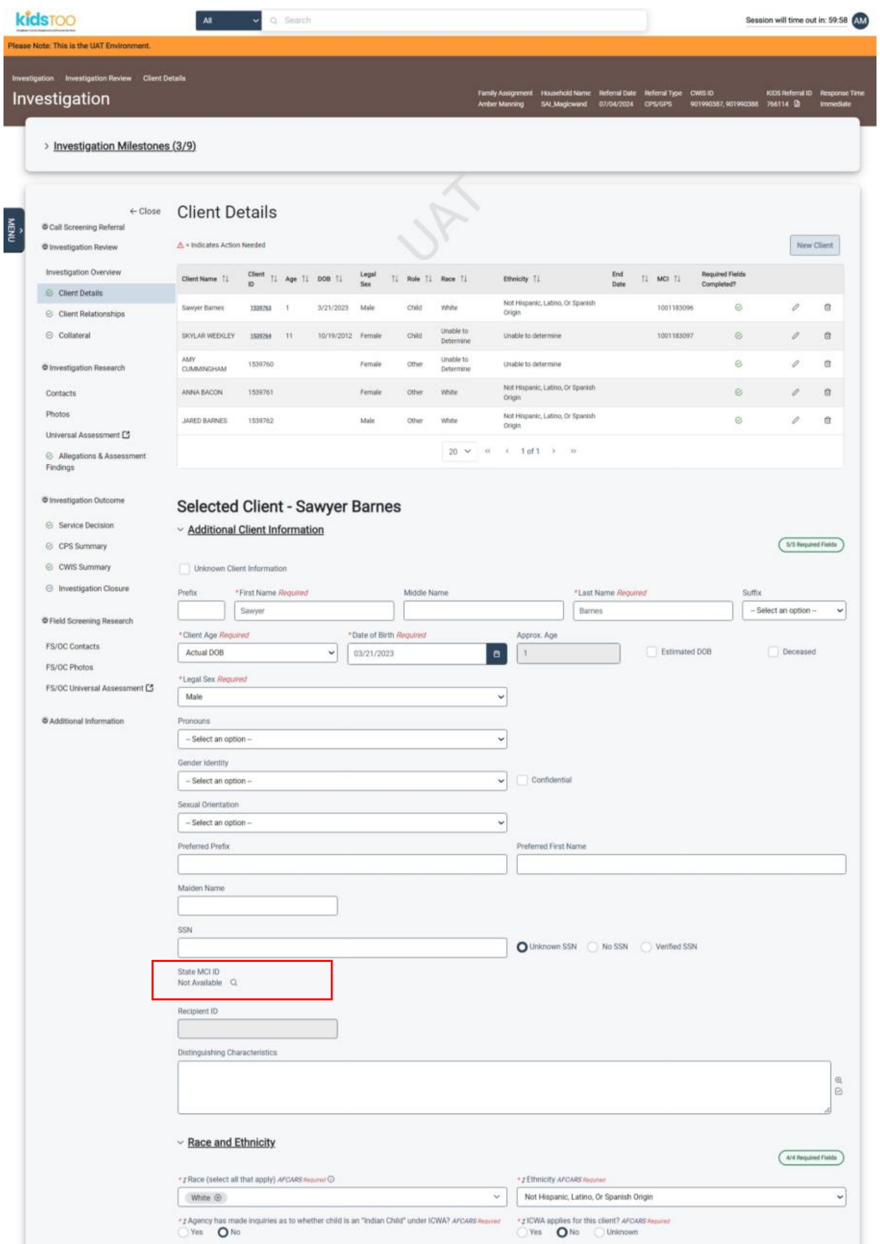
After applying the details to all photos, you can still edit the information for individual photos. For example, if the client's name is different but all other details are the same, use the 'Apply to All Photos' option and then update the Client Name for individual photos.

Once all the required details are added, the user can click the Upload button and the photos will be uploaded with entered details.



State MCI Clearance

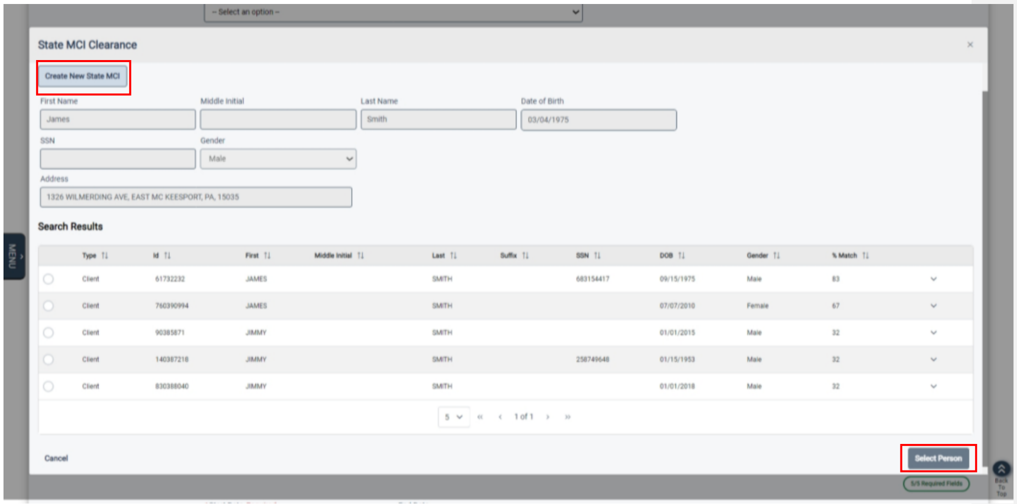
Users can perform the state MCI clearance by using the magnifying glass for State MCI under Additional Client Information section. The State MCI will show 'Not available' until the client has state MCI.

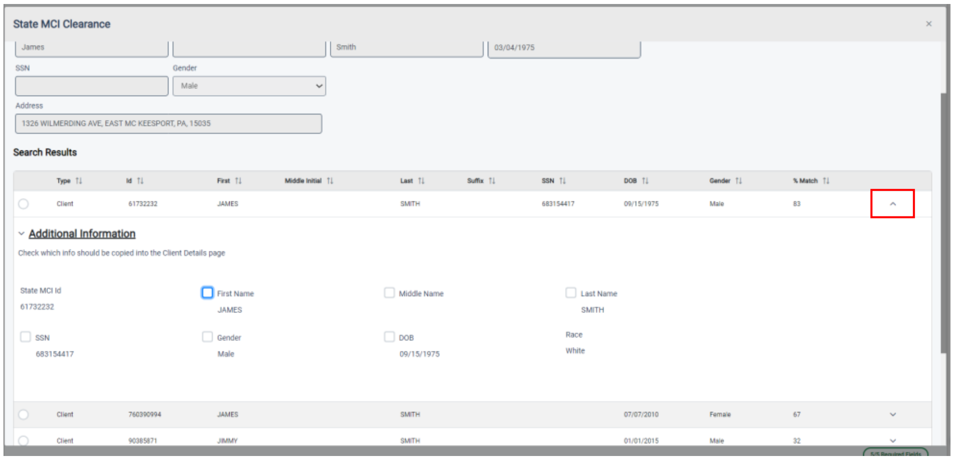


Please Note: This is the UAT Environment.
Investigation
Investigation Milestones (3/9)
Client Details
Selected Client - Sawyer Barnes
Additional Client Information
State MCI ID
Not Available
Race and Ethnicity

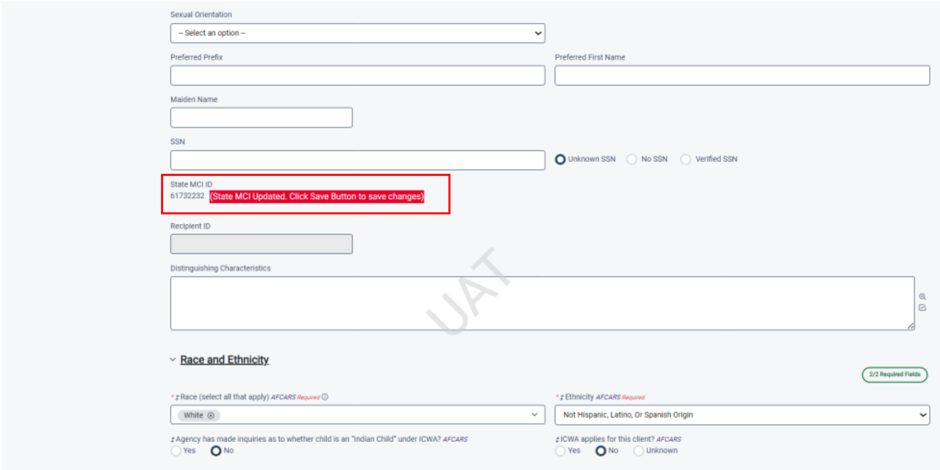
On click of the magnifying glass below popup will open. User can either select one of the existing state MCI from the Search Results or Create New State MCI by clicking the button at the top.

User can also see additional information about the Search Results by using the drop arrow towards the end of the table row.



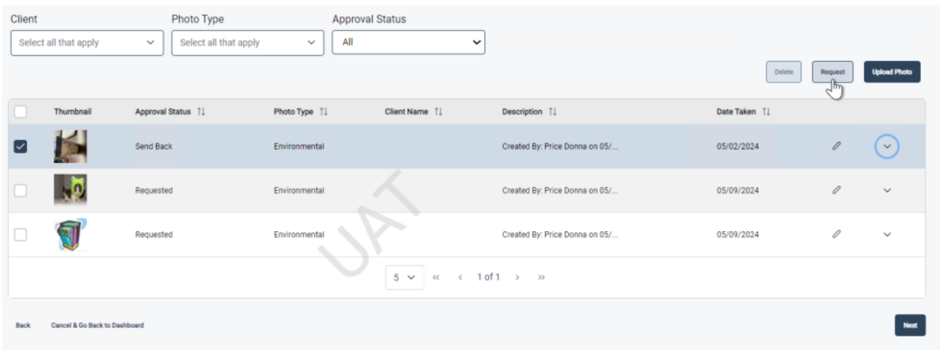


Upon selecting or Creating the new state MCI, it will start reflecting on the screen. However, it will not be saved until the Save button is clicked. The message next to State MCI ID field will indicate the same.

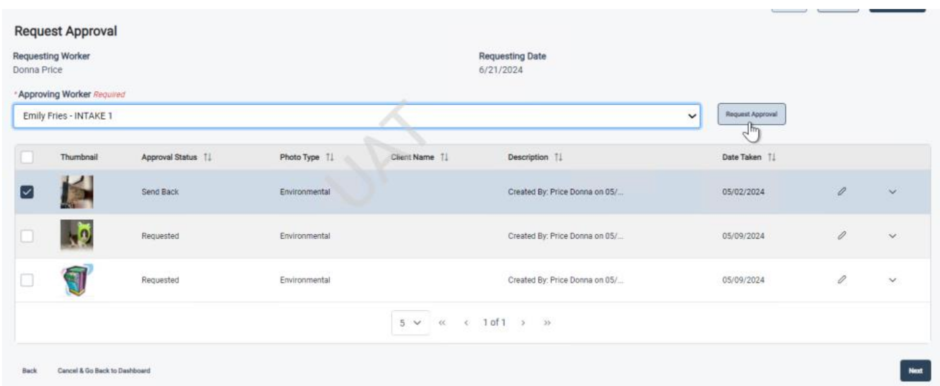


Easy-to-Use Approval Control

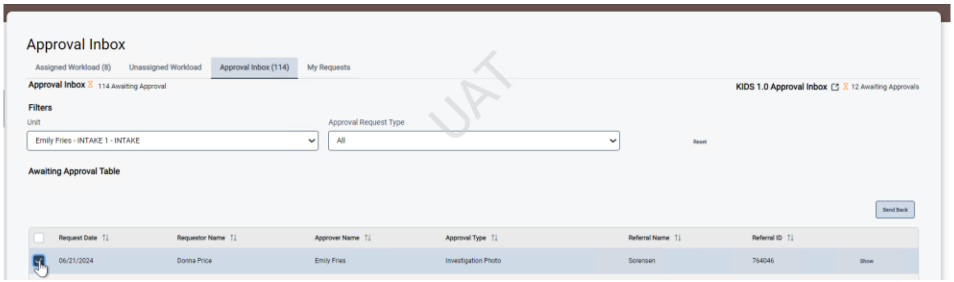
In the photos and contacts screens there are options to approve and send back. The user can directly select the record and click on Approve or Send back.



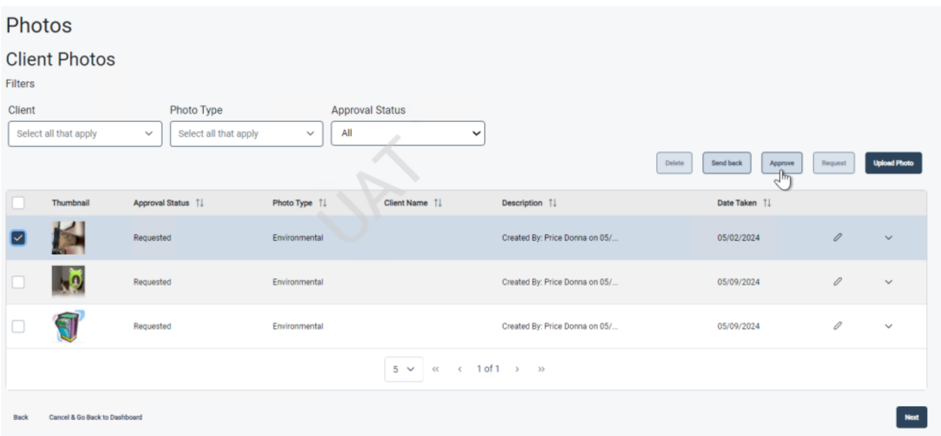
1. For approvals, users will select the entry for which they would like to request approval. Then they click the Request button.



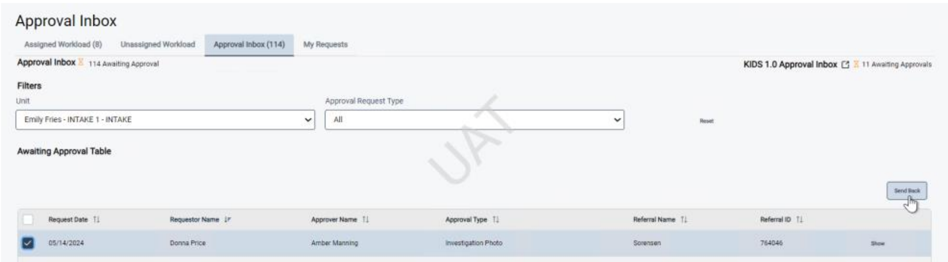
2. Users are then prompted to select an Approving Worker from the dropdown.
3. After selecting an Approving Worker, click the Request Approval button.
4. The request will be sent to the Approving Worker's Approval Inbox.



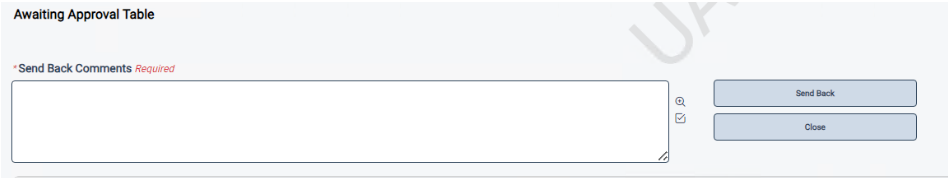
5. The above screenshot shows the request in the Approving Worker's Approval Inbox.
6. To view the request, click Show at the end of the row.



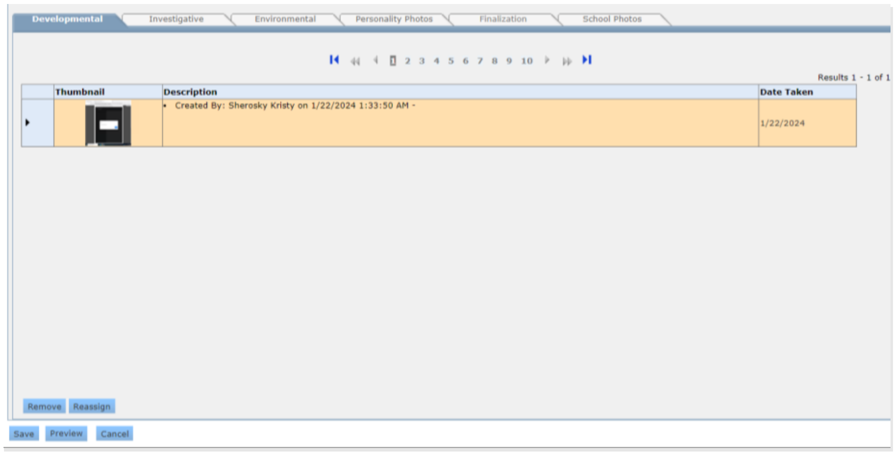
7. If the request should be approved, the approving worker clicks the approve button and the request will be approved.
8. If the request is unsatisfactory, the user can either click the Send Back button to the left of the approve button, or they can send back from the dashboard.



9. From the Approval Inbox, the user can choose the entry and select the Send Back button.



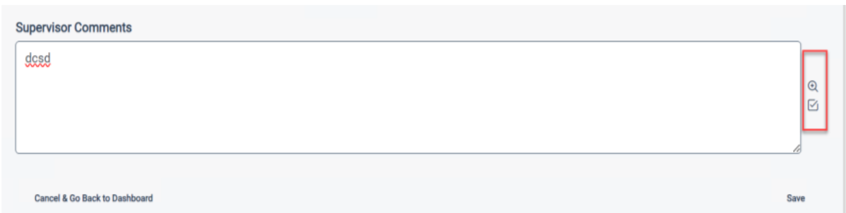
10. The user will then be prompted to add Send Back Comments.
11. If the request is sent back it will appear in the My Requests tab of the requesting worker's Dashboard.



In Legacy KIDS, this functionality is not available. The user cannot directly select a request and approve it.

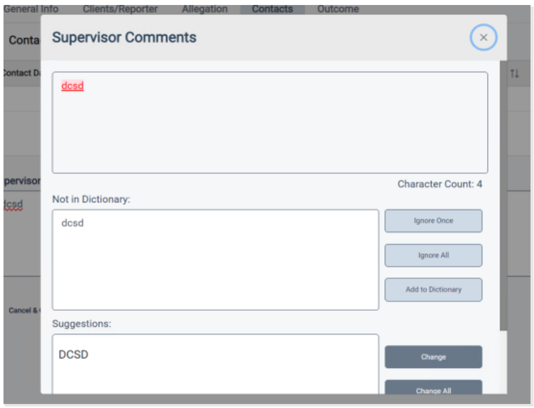
Magnifier and Spell Check

Magnifier and spell check tools are present in for text areas like Notes or Comments throughout the application.



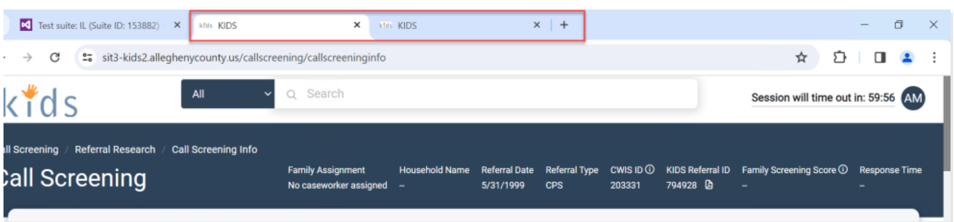
When the user selects the Magnifying Glass icon, the Comments pop up is displayed. From here, the user can view comments and also edit as required. Click the Save & Close button to save any changes.

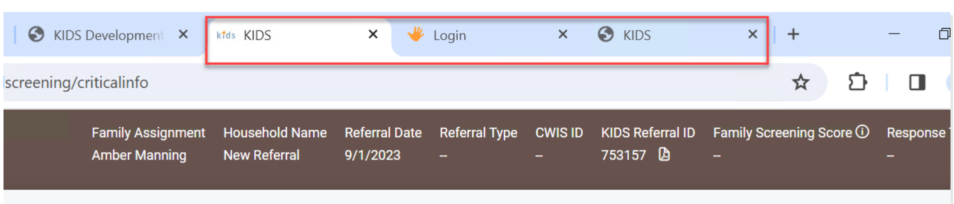
The user can also use spell check by clicking on the spell checker icon which is beside the Comments text box. If there is an internally used word or acronym that is showing up as misspelled, users can click the Add to Dictionary box so it will not be shown as misspelled in the future. After clicking, the below pop up is displayed and the user can go forward in updating the text.



Multiwindow Usage

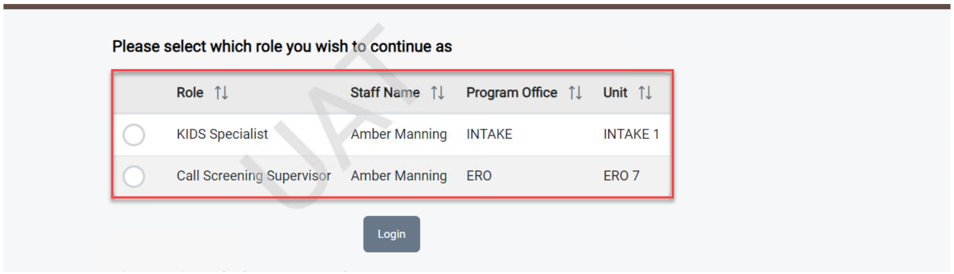
Users are now able to have more than one window of KIDSTOO open at a time.



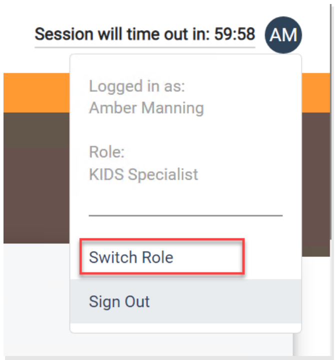


Selection of Roles (For Users with Multiple Roles)

When logging in, the user selects their desired role using the radio buttons and then clicks Login.



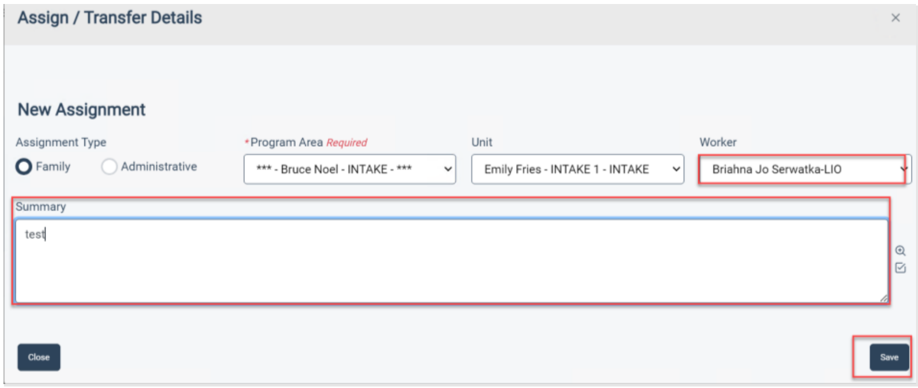
For users with multiple roles, they can switch roles without closing the application using Switch Role. Select the user icon (user initials) and then click Switch Role. The user can switch roles without closing the application.



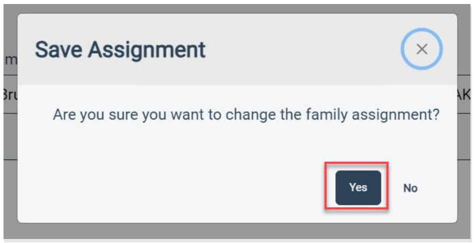
Bulk Assignment Transfer

The user can assign multiple referrals at the same time by selecting the checkboxes of the referrals and clicking the Assign/Transfer button at the top of the grid.

The Assign/Transfer Details pop up is displayed. The user can select the Program Area, Unit, Worker, and add Summary Comments if required and then click Save.

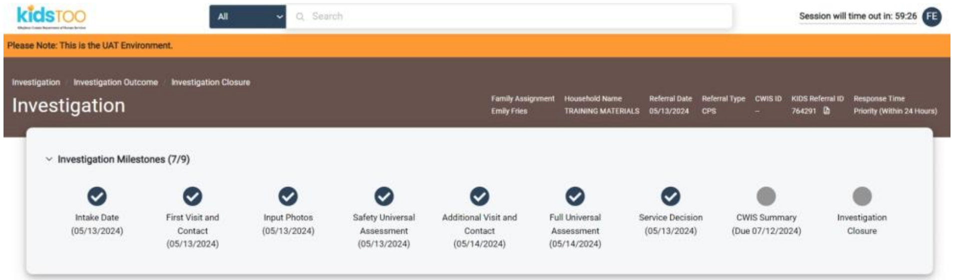


After clicking Save, the confirmation pop up is displayed. When the user clicks Yes, all selected referrals will be assigned to the selected worker.



Investigation Milestones

This is a new addition in KIDS TOO for Investigation Referrals to get a quick overview of different milestones as part of investigation process and their status. Since it's not a linear process, the milestones can be completed in no particular order. Some of these milestones have due date while others can be completed within the period of 60 days. The ones having due date will show the Due date to start with and will start showing the completion date as soon as it's completed.



- Intake Date - defaults as checked and pulls intake date.
- First Visit and Contact - checks when first face to face contact is completed and pulls the date of that contact.
  - Contact is complete when "Completed" radio button is selected.
- Input Photos - checks once a photo is entered for all child clients (participating as a child = Yes) and pulls date of photo entered on last child
- Safety Universal Assessment - checks once UA - Safety is approved and pulls the assessment date.
  - Count only Safety-UA (does not count Safety On-Call)
  - Always pulls latest assessment date of latest Safety UA listed on UA History List screen for referral.
- Additional Visit and Contact - checks once a new face to face contact is entered after the initial face to face contact.
  - Always pulls the date of the latest face to face contact if there are more than one documented after the initial face to face contact.
- Full Universal Assessment:
  - By default, shows Due Date. Due date is 60 days after the Intake date.
  - Once Full UA is approved, it changes the due date to the Assessment date.
  - Always pulls latest assessment date of latest Full UA listed on UA History List screen for referral

- Service Decision:
  - By default, shows the Due Date. Due date is 60 days after Intake date.
  - Once Service Decision is approved, it changes the due date to the approval date.
- CWIS Summary - checks once CWIS summary is approved and pull approval date.
  - By default, it shows the Due Date. Due date is 60 days after Intake date.

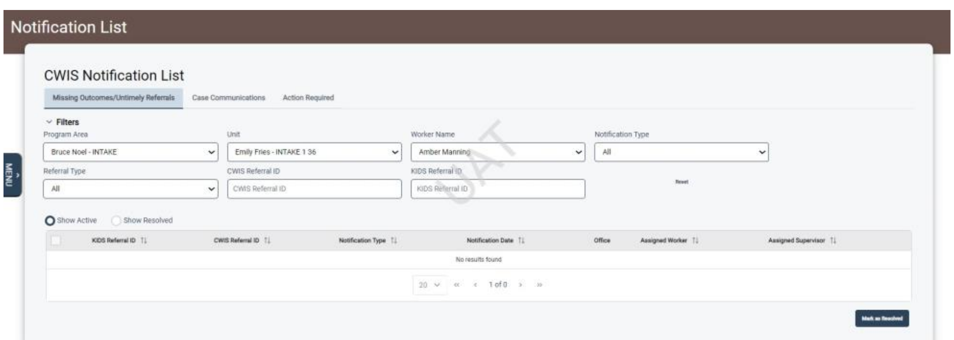
- Once CWIS Summary is approved, it changes the due date to the approval date.
    - Pulls approval date of highest tier approval.
- Does not update approval date in amend scenario. If INV is amended, it keeps the original approval date.
- CWIS id merge scenario - it shows approval date once all CWIS IDs have approved CWIS Summary
    - For latest approval date it uses the date of the highest tier approval

- Investigation Closure - checks once referral is closed and pulls the date when INV was closed.
    - Does not update approval date in amend scenario. If INV is amended, it keeps the original approval date.

KIDS Specialist Functionality

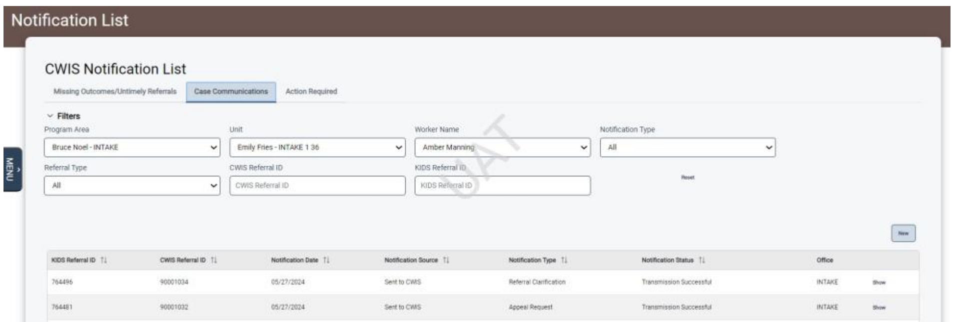
CWIS Notification

To access the CWIS Notification screen, users click the floating Menu button and then select CWIS Notification. The CWIS Notification list screen will open and default to the Missing Outcomes/Untimely Referrals tab. From here, users can search to find both active and resolved items. Multiple filters are available to pare down results. Additionally, results can be marked as resolved. The user selects the result using the checkboxes in the leftmost column and then clicks the Mark as Resolved button in the bottom right corner.

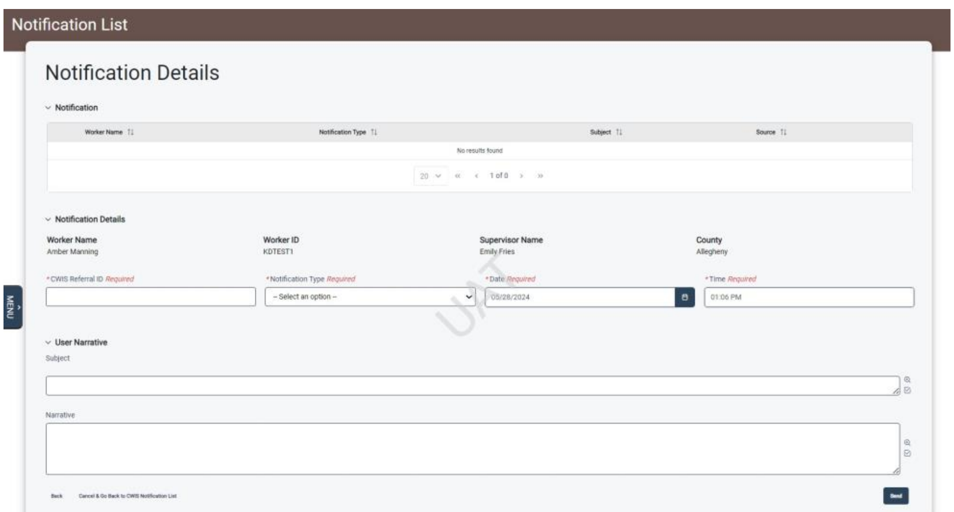


Commented [CP8]: This should be moved to Specialist Functionality Doc.

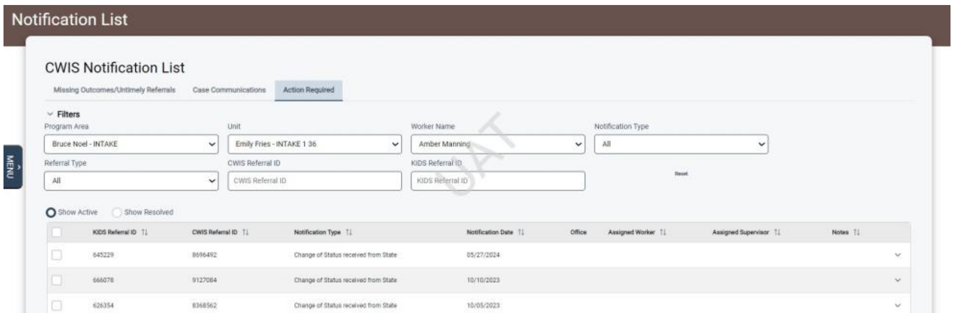
To view Case Communications, users click the Case Communications tab at the top of the screen. The same filters are available to pare down results. To view a result, users click the Show button to the far right of the row. Users can also add new by clicking the New button above the top right corner of the grid.



After clicking the New button, The Notification Details screen will open with blank fields available for users to input known information.

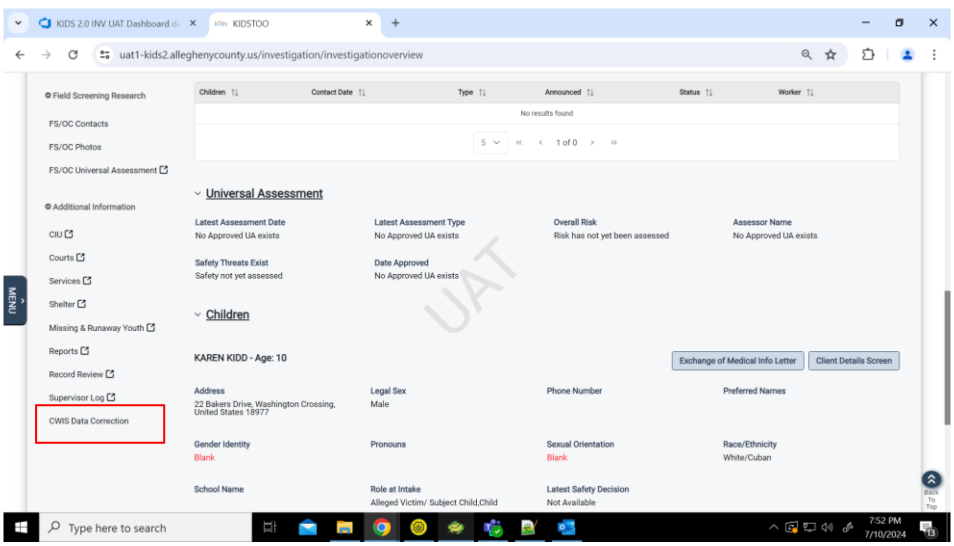


After completing the required fields, the user can send the details to the state by clicking the Send button in the bottom right corner.

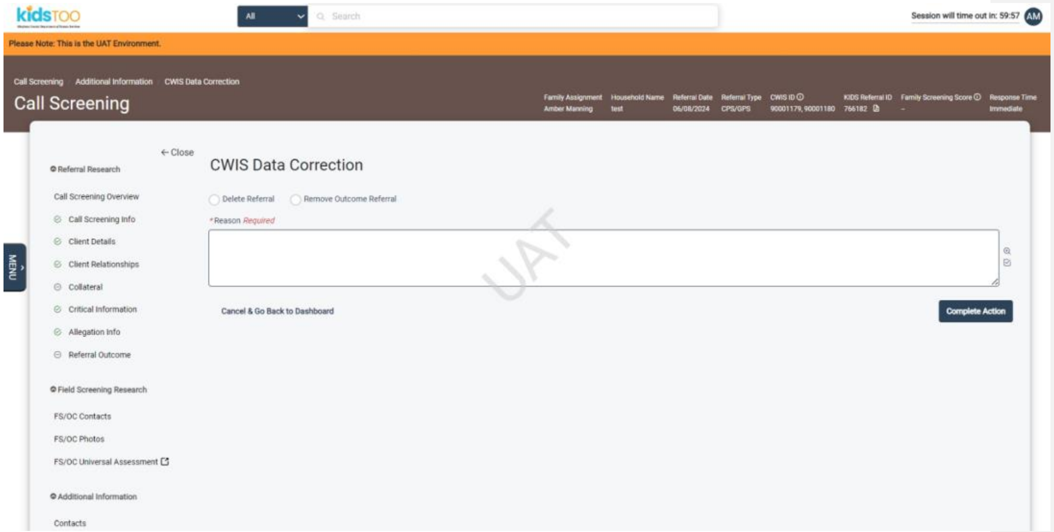


CWIS Data Correction

Specialists can access CWIS Data Correction screen from within the referral using the left navigation menu as highlighted below. The similar menu is available when the referral is still in Call Screening.

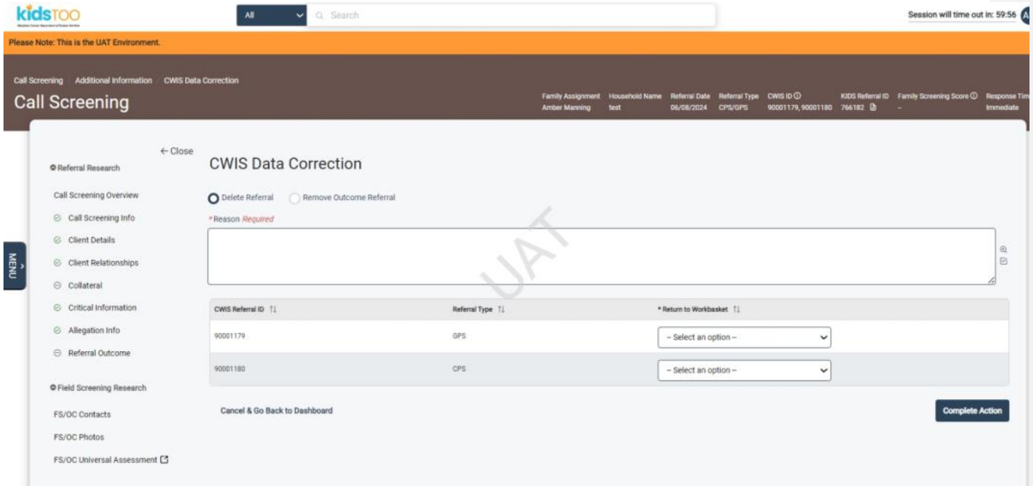


The user will have 2 options – Delete Referral or Remove Outcome Approval.



If it's a CWIS created Referral, upon selecting the Delete Referral option, user will be asked to decide whether to put the referral back to workbasket or not.

Selecting 'No' will completely wipe off the referral from the system.

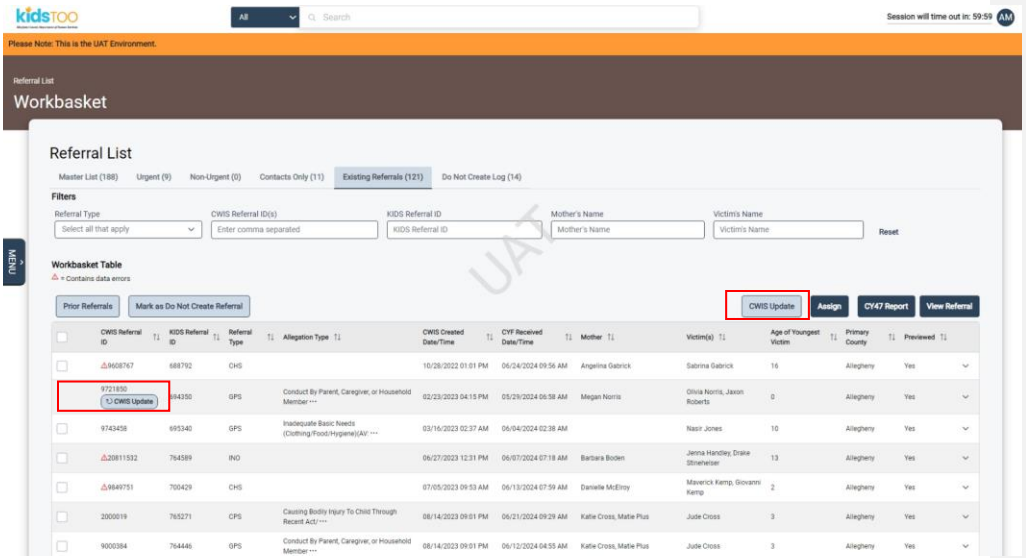


CWIS Update (Magic Wand)

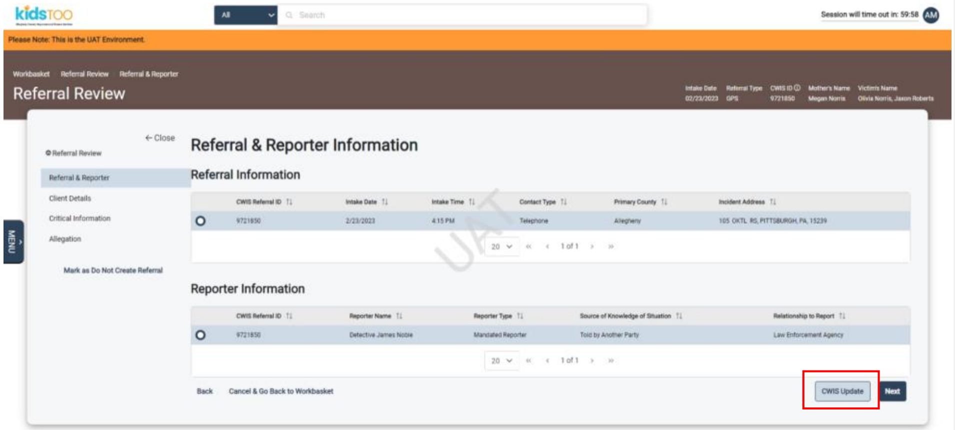
When the state sends the update on existing referral, instead of manually typing those updates in the system, specialists or ROD can perform the CWIS update on the referral on the Workbasket. This applies updates received from state to the KIDS referral. The update process is done asynchronously, and user can continue with tasks in the application.

The CWIS Update functionality is available in two places:

a. Existing Referral tab: The button CWIS Update can be clicked after selecting the referral that needs to be updated.



b. On all 4 Referral Review Screen: The CWIS Update button can be found when user clicks on the View Referral from Workbasket and opens the Referral Review Screen for reviewing the information received from the state.


Please Note: This is the UAT Environment.
Workbasket Referral Review Referral & Reporter
Referral Review
Referral & Reporter Information
Referral Information
Reporter Information
Back
Cancel & Go Back to Workbasket
CWIS Update
Next