eCornerstone Application Update

for April 14, 2003 Deployment

The following changes to the eCornerstone system will be deployed and effective on April 14, 2003. If you have any questions, please contact the Cornerstone Call Center at toll-free 1-877-447-4221. NOTE: The data displayed on screen captures is test data, and in no way reflects actual data being captured by the Youth Services agencies.

GENERAL INFORMATION

The **eCornerstone Reference Manual** is now available to all eCornerstone users. To access this manual, choose "Help" from the Navigation Bar located at the top of each page.

Selecting this link opens a new browser window and displays the User Help page, which provides access to the eCornerstone Reference Manual.

The Reference Manual is available in Portable Document Format (PDF), which requires that the user have Adobe Acrobat Reader 5.0 or higher to view the manual. If you do not have Adobe Acrobat Reader 5.0 or higher, visit **http://www.adobe.com/products/acrobat/readstep2.html** to download the latest version.

The complete Reference Manual is over 150 pages, which may require some time to download depending upon the type of Internet connectivity being used. To reduce download time, the manual can also be accessed by individual chapters.

The User Help page displays the date the manual was last updated. The eCornerstone Reference Manual will always be updated in conjunction with the deployment of a new version. In addition, periodic updates may also be made to the manual to provide additional information as deemed necessary, to update forms, etc. To ensure users always have the most up-to-date information, do not save the manual to your workstation. Instead, you should always access it via the Internet.

The User Help page will also allow users to access this and all future "eCornerstone Application Updates".

Session Timeout

eCornerstone is a secure application. This means that the user is validated with every qualified activity. Rather than having each activity prompt the user to enter his or her username and password, the application conveniently remembers the user information for a limited time. If a qualified activity occurs within this time period, it can be performed without prompting the user for their username and password.

Currently, the time period for eCornerstone is 20 minutes. Each time a qualified activity is performed, it resets the time period to start over. "Qualified" activities include clicking on the "Save" button or "Refresh" button, or navigating to a different screen. It's important to note that neither typing information in a form, nor resetting a form with the "Reset" button are qualified activities, and therefore will not reset the time period. Once the time period expires, the system requires the user to enter his or her username and password to perform any other activities.

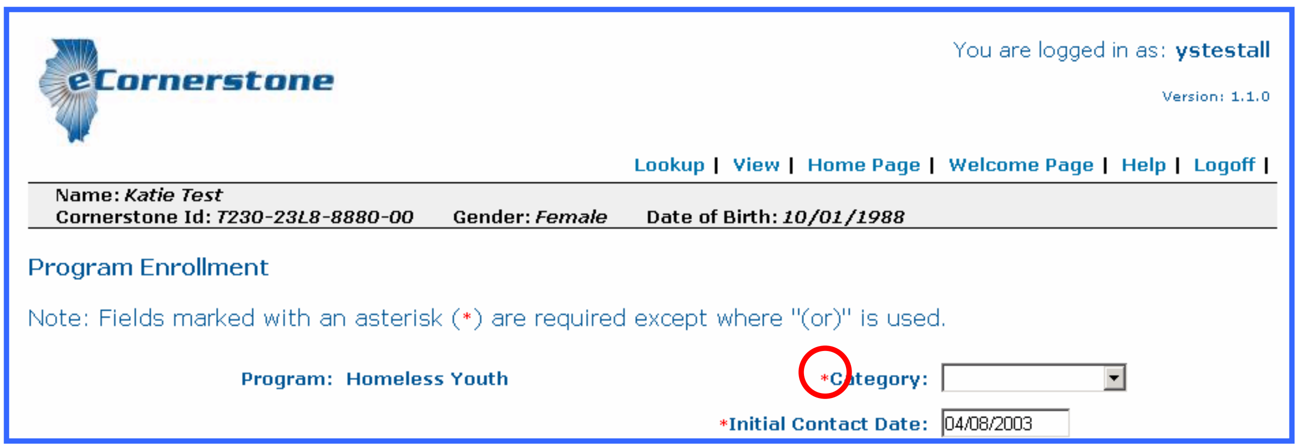
To avoid expiring your session and being directed to reenter your User ID and Password on the Logon screen, remember to "Save" often – even if you are not finished completing a form or page.

SYSTEM CHANGES AND ENHANCEMENTS

Modifications have been made to **drop down lists** on various screens to display the lists in alphabetical order, with one blank at the top of the list.

When a user **logs out** of eCornerstone (by selecting "Logoff" from the Navigation menu), the page displayed (with the message "You are now logged out") now contains a link for the user to navigate to the Welcome page.

All **required fields** (on each page/section within the application) have been marked with a red asterisk (*) to indicate that the field is required.



Select the Program to Complete the Assignment
Modifications have been made to the way a client's program history is sorted on the Select the Program to Complete the Assignment page [accessed from the (Re)assign this Participant link].   The list is now sorting by Program, by 'Active' status, and then by Assignment End Date.

In addition, when viewing the program history on the Select the Program to Complete the Assignment page, the "Assignment Start Date" field has been modified to reflect the date the client was assigned to the Case Manager rather than the client's Enrollment Date.

Family and Support
Selection of the Primary Language on the Family and Support page has been modified to remain selected after leaving the page.

Demographic
The "Intake Date" field on the Demographic page no longer reverts to today's date after saving and leaving the page.

View Program History

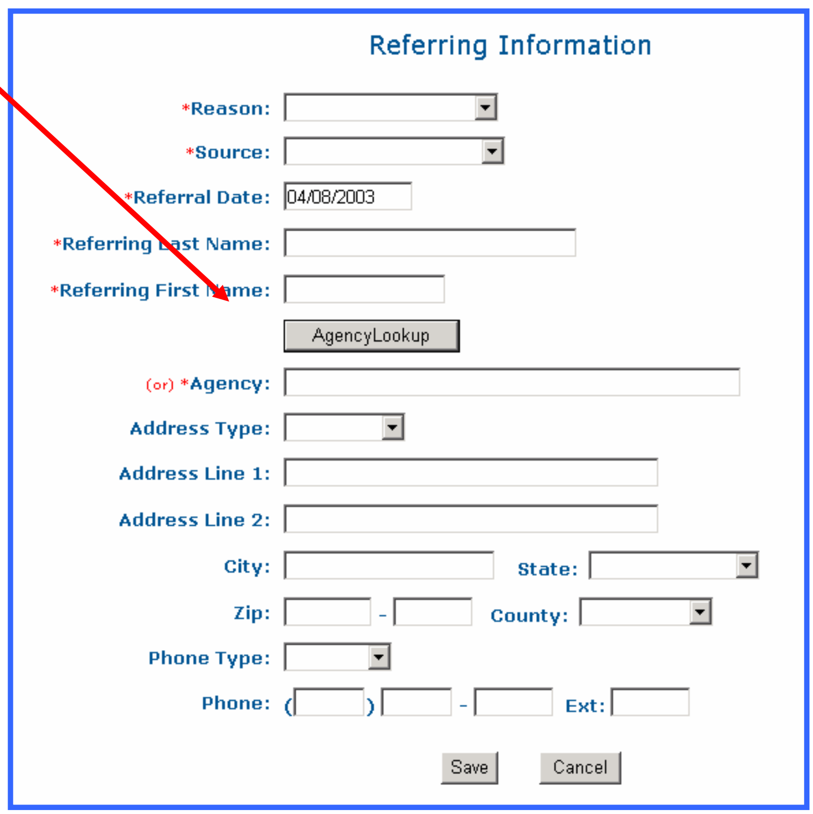
When viewing the Program List (by selecting the Program Information: View Program History link on the Participant View page), the "Filter By Program" drop down list now shows only the programs in which the client is enrolled. Previously, the list displayed all programs.

Program Enrollment

The following changes have been made to the Program Enrollment page:

- (304) A new program enrollment selection has been added to the system. "Other YS Program" is to be selected to designate a youth that is participating in a program that is not funded by DHS Division of Community Health and Prevention (i.e., not one of the 10 programs currently listed). This would include any other DHS-funded program or programs funded by other sources. If the agency elects to administer the YASI assessment and use eCornerstone to record the results, a program enrollment page is to be completed using "Other YS Program".
- When viewing an existing program record (by selecting a program from the Participant View page), the "Initial Contact Date" field date now displays the correct date. Previously, this field would default to the current date. If the user changed the date and saved, then returned to the page, eCornerstone would still display the current date.
- This page was also modified to correctly save. Previously, users might receive an error message when attempting to save this page.
- A new "County" field has been added, with a drop down list of all Illinois counties.
- The referral date ("Date" field under the "Referring Information" section) has been modified to allow users to enter a date prior to the Initial Contact Date. Previously, users could not enter a date prior to the Initial Contact Date. eCornerstone now allows users to enter any date, so long as it is greater than the birth date, and not after the Initial Contact Date.
- All users can now enroll a client in any or all programs. (Supervisory staff still must assign a client to a case worker who is authorized to work in the appropriate program.)
- The "Category" field is now editable for users, even after they have saved the initial record.
- A **new Agency Lookup Function** has been added to the Program Enrollment page. When completing the Program Enrollment page, a user can now search for the referring agency by clicking on the new "Agency Lookup" button:

  The Agency Lookup page is displayed. The user can search by agency name or by city. After entering the search criteria and clicking on the "Search" button, a list of possible agency matches is displayed. If the referring agency is found (displayed), the user can select the agency by clicking on its name. The following fields will auto-fill with the agency's information:
  - "Agency"
  - "Address Type"
  - "Address" (line 1 and 2, as applicable)
  - "City"
  - "State"
  - "Zip"
  - "Phone Type"
  - "Phone"



Assign Multiple Participants

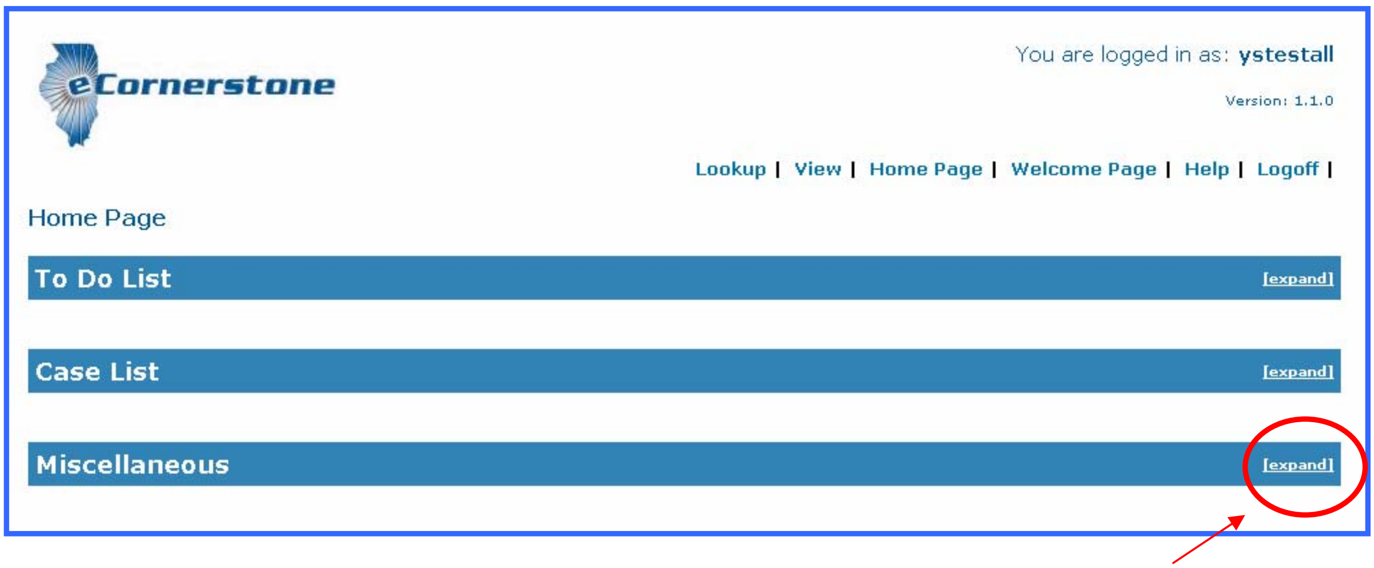
The Assign Multiple Participants page has been modified to include a "Back" button to allow users to return to the Home Page.

Progress Notes
The Progress Notes page has been modified to allow the "Progress Notes Date" to be a date in the past [not prior to the Intake date (found on the Preparing Participant for Intake page), and not later than the current date.).

Assessment
If a client does not have any existing assessments, the "Select Purpose for new YASI" field now defaults to "Initial Assessment" as the only option. If a client has an existing assessment, the "Initial Assessment" option will not be available, and the user can select "Reassessment" or "Closing Assessment".

To Do List
The To Do List is a new function that helps users remember important time-sensitive events that need to be completed, including completion of pre-assessments and full assessments, follow-up reminders, and any other time-related notifications pertinent to the client's case. If the user logged in is a supervisor, or is a worker who has rights to assign clients (as defined by his or her security role established by the agency), the To Do List also displays a list of clients who need to be assigned to a case worker ("unassigned participants").

Once a user logs in to the application, the Home Page is displayed:



The Home Page contains the To Do List, Case List, and Miscellaneous sections. An "Expand / Collapse" link is located on the far right of each section's blue header bar. This option allows the user to expand (display) or collapse (hide) each section.

The To Do List offers various filters and sorting capabilities:

- The supervisor can filter the To Do List to view only a specific employee's items (so long as the user is the supervisor of the employee). After selecting an employee's name from the "Worker" drop down list and clicking on the "Filter" button, the page displays the items for that specific employee (such as Generic Reminders, and Missing Assessments as applicable). If the user is not a supervisor, his or her name will be the only option in the "Worker" field.
- The user can filter the list by Category (All, Pre-YASI, Full-YASI, Generic Reminder, or Missing Assessment). If the user is a supervisor, or is a worker who has rights to assign clients, he or she can also filter by "Unassigned Participant". After selecting the desired filter from the "Category" field and clicking on the "Filter" button, the page displays only those applicable items.
- The system uses the default duration time frame of five days for identifying To Do Items. Therefore, any items due in the next five days (as well as all over due items) are displayed by default. However, any user can set the duration as he or she desires, within the minimum of one 1 day and the maximum of 180 days. Should the user change the duration (by entering a

new number in the "Duration" field and clicking on the "Filter" button), the new duration setting is saved as the default for that user.

The To Do List displays the following elements for each item:

- Messages – Identifies the action that needs to be taken.
- Message Type – Further clarifies the item by identifying its Category.
- Participant Name – Name of the client directly associated with the action required.
- Time Remaining – If the item is time-based, this column displays the amount of time (days, hours and minutes) remaining from the current date until the task is due, or the amount of time (days and hours) the item has been overdue. Overdue items are displayed in a red font ["33d 1h (past due)" meaning 33 days and 1 hour overdue), and items due in the future are displayed in a green font ("8d 21h 51m" meaning due in 8 days, 21 hours and 51 minutes).

These elements can also be sorted by clicking on the column header:

MESSAGES	MESSAGE TYPE	PARTICIPANT NAME	TIME REMAINING
Incomplete Assessment	Pre-YASI	brown, nathan test	43d 2h (*past due*)

The system automatically sorts the To Do List items in chronological order with past due items first, items scheduled for the current date next, and items scheduled to be completed in the future (time frame defined by the duration setting) last. However, the user can resort the list by clicking on the "Messages", "Message Type" or "Participant Name" column heading. The system re-sorts the list alphabetically by the selected item.

The system provides a navigational mechanism to assist users in completing an item. The "Messages" text serves as a link to the appropriate page to complete the task:

- Clicking on the "Incomplete Assessment" text link navigates the user to the appropriate assessment (Pre-YASI or full YASI) page.
- Clicking on the "Missing Assessment" text link navigates the user to the "Select Purpose for new YASI" page.
- Clicking on the "Unassigned Participant" text link navigates the user to the "Assign a Participant" page.
- Clicking on the text link of a generic reminder navigates the user to the Generic Reminder page.

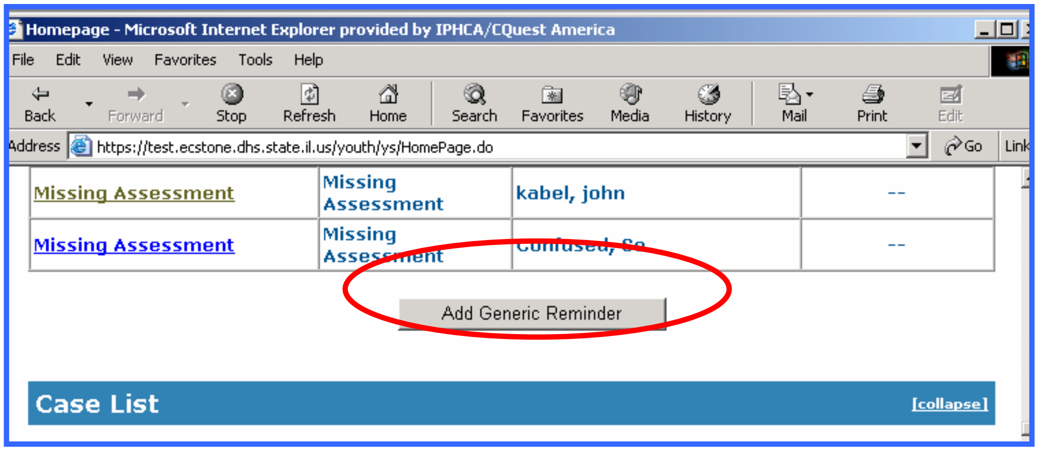
Following the enrollment of a client in a program, the system automatically generates a To Do item in the following scenarios:

- If the client has not yet been assigned to a case worker.
- If the client needs to be assessed (has no existing assessment or has an incomplete assessment). The item will be displayed (in the "Message Type" column) as "Pre-YASI" until the Pre-YASI assessment completion date/time is set. Once the Pre-YASI assessment completion date/time is set, the item will be displayed as "Full-YASI".
    - The Pre-YASI assessment scheduled completion date/time is calculated using two working days from the assessment start date/time.
    - The Full-YASI assessment scheduled completion date/time is calculated using 10 working days from the assessment start date/time.
        - The "assessment start date/time" is the date and time recorded by the eCornerstone system when the user first begins the assessment.
- A reassessment reminder will be generated for a client with an open enrollment in a Youth Services program for 76 calendar days after the last completed Full YASI assessment.

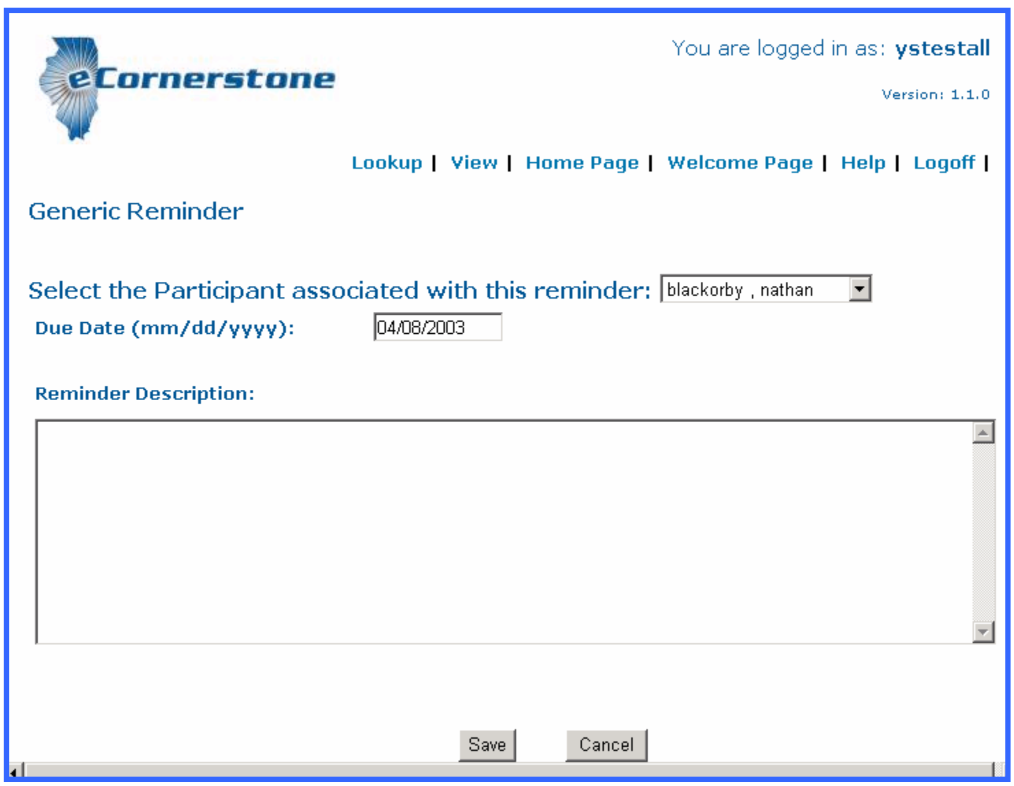
Users who have been assigned the Case Worker security role can also add "generic reminders" to assist in the managing of their caseload. A generic reminder is applicable only to the user who creates the reminder, and therefore is only viewed by the user. However, a supervisor can view and edit his or her employees' generic reminders, and when a client is reassigned to a new case worker, the generic reminders are transferred to the new case worker.

To add a new "generic reminder":

1. Select the "Add Generic Reminder" button, located at the bottom of the To Do List section. NOTE: This button is available only when a user is viewing his or her own To Do List.



2. The Generic Reminder page is displayed:



3. In the "Select the Participant associated with this reminder" field, the drop down list displays all active clients assigned to the user. Select the client to whom the reminder will be associated.
4. In the "Due Date" field, enter the date the reminder is due.
5. In the "Reminder Description" field, enter the text to be displayed in the "Messages" column of the To Do List.
6. Click on the "Save" button to save the reminder, or the "Cancel" button to cancel.

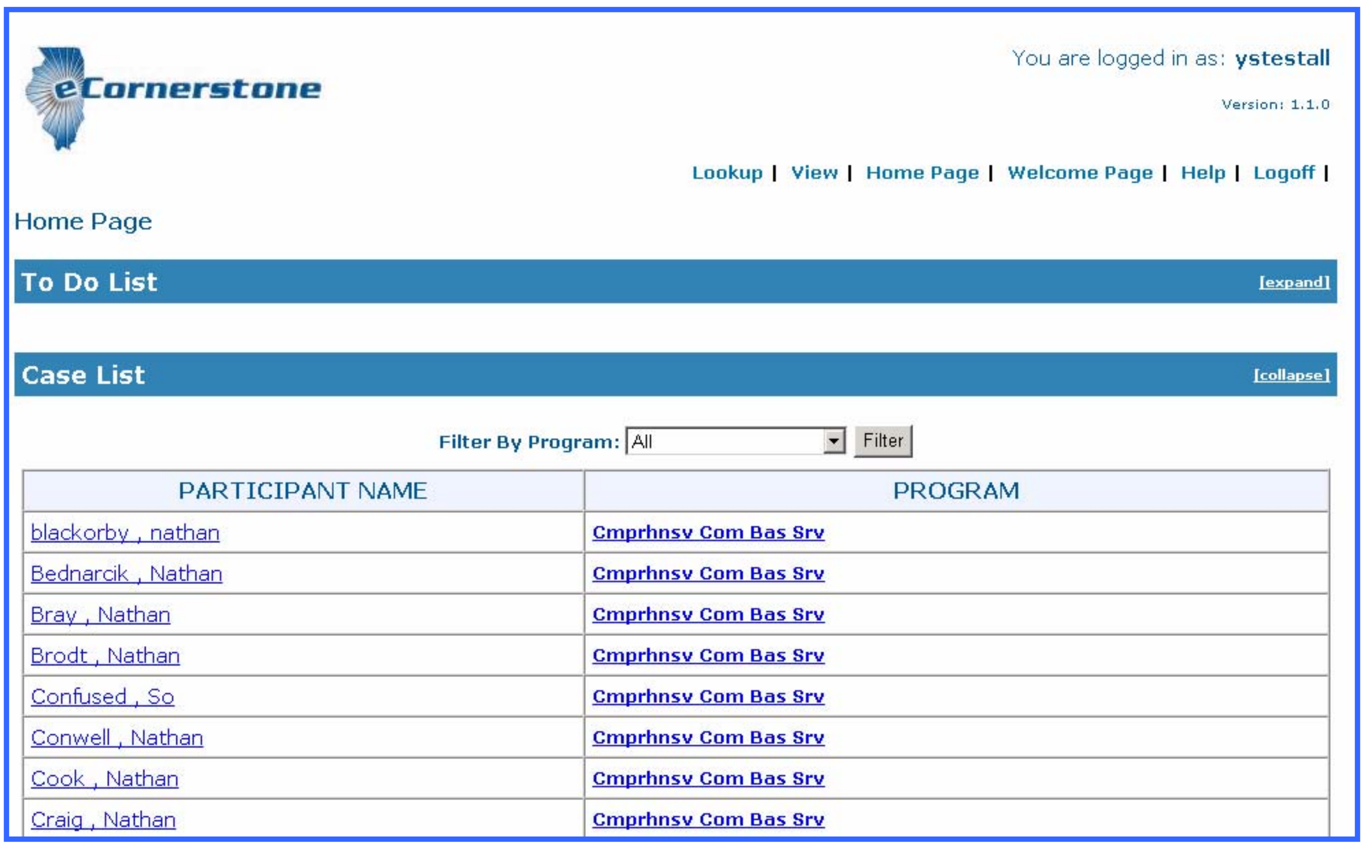
To update a generic reminder:

1. From the To Do List, click on the text in the "Messages" column of the generic reminder you wish to update:

2. The Generic Reminder page will be displayed.
3. The client's name is displayed, and can not be changed.
4. The user can update the due date, or edit the Messages text.
5. If the item is completed, the user clicks on the "Remove" button. This removes the item from the To Do List.
6. Once the reminder has been updated, click on the "Save" button to save the reminder, or the "Cancel" button to cancel.

Case List

The Case List function has also been added to the Home Page. For a user who has been assigned the Case Worker security role, the Case List section displays a list of all clients currently assigned to the user. A supervisor can also filter on his or her employees to view just the selected case worker's case list.



The list displays the client's name and program. Clicking on the Participant Name text link navigates the user to the Participant View page, and clicking on the Program text link navigates the user to the Program Enrollment page.

The user can also filter the case list by program. The "Filter By Program" drop down list displays the programs in which the case worker has cases. After selecting the desired program from the "Filter By Program" field and clicking on the "Filter" button, the page displays only those clients enrolled in the selected program.

Searching Functionality
The search functionality has been modified to only display a client (potential match) once, even if the client has multiple names and/or multiple addresses. Previously, if a client (identified as a potential match during the search process) had multiple names and/or multiple addresses entered in eCornerstone, the client would be listed as a potential match multiple times instead of once. Now, all information for the client will be displayed as one result instead of multiple results. Within the result all the information about the person, such as names and addresses, will be displayed.

NOTE: When the results are returned for a client search, only the name types that match the last name being searched on are displayed. For example, if a client whose Known By name is “Fox” and his Birth Name is “Foster”, the results for a search on “Fox” will only show the Fox (Known By) name. A search for “Foster” would also return this person, and in this case, his “Foster” (Birth Name) would be displayed.