



eCornerstone Application Update

for July 14, 2003 Deployment

The following changes to the eCornerstone system will be deployed and effective on July 14, 2003 (version 1.1.2). If you have any questions, please contact the Cornerstone Call Center toll-free at 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 has been updated with all changes and additions outlined in this document.

SYSTEM CHANGES AND ENHANCEMENTS

Miscellaneous Modifications

Pages requiring entry of a date now contain a new calendar feature. Users can click on the calendar icon to the right of the date field, and a pop-up calendar will be displayed. Users then have the option to scroll forward or backward to search for past or future dates. When the user clicks once on the desired date, the system will automatically enter the date in the field. The calendar pop-up box also displays a "Today" link. If a user clicks once on this link, the system will automatically fill the date field with the current date. Users can still enter dates manually if desired.

The screenshot shows the eCornerstone application interface. At the top left is the eCornerstone logo. At the top right, it says "You are logged in as: cststall" and "Version: 1.1.2" with a "Version Detail" link. Below this are navigation links: "Lookup | View | Home Page | Welcome Page | Help | Logoff |". A user profile bar shows: "Name: Bo Hart", "Cornerstone Id: H630-1008-9138-00", "Gender: Male", and "Date of Birth: 05/14/1989". Below the profile bar are tabs for "Demographic", "Consent", "Family and Support Contact", and "Cross Reference". Under the "Demographic" tab, there are sub-links: "Demographic | Name | Address | Phone". The main content area shows a breadcrumb trail: "Intake > Demographic > Demographic". A note states: "Note: Fields marked with an asterisk (*) are required." The form contains several fields: "*Last Name:" with the value "Hart"; "*First Name:" with the value "Bo"; "*Date of Birth (mm/dd/yyyy):" with the value "05/14/2003" and a calendar icon; "Gender:" with a dropdown menu set to "Male"; "SSN:" with three empty input boxes; and "*Intake Date (mm/dd/yyyy):" with the value "06/02/2003" and a calendar icon. A red circle highlights the "Date of Birth" field and its calendar icon, with an arrow pointing to a pop-up calendar window. The calendar window shows the month of May 2003, with the 14th of May highlighted. At the bottom of the calendar is a "Today" link.

The following pages within the **Assign Multiple Participants** module were modified:

- The **Select Participants for Assignment** page was redesigned to simplify the process of assigning participants to case workers. The page now lists Unassigned Participants and workers with participants who are available for reassignment.

eCornerstone You are logged in as: **cststall**
Version: 1.1.2
[Version Detail](#)

[Lookup](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

Selected Program: Cmprhnsv Com Bas Srv

Select Participants for Assignment

Unassigned Participants	[Click to view names of participant(s)]
CS TSTWKR	[Click to view names of participant(s)]
CS TSTALL	[Click to view names of participant(s)]
Worker First	[Click to view names of participant(s)]

- The user will click the link to the right of “Unassigned Participants” to view the list of participants who are not assigned to a case worker. Clicking on the link to the right of the case worker’s name will produce a list of that case worker’s current caseload.

[Lookup](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

Selected Program: Cmprhnsv Com Bas Srv

Select Participants for Assignment

Unassigned Participants	[Click to view names of participant(s)]
CS TSTWKR	[Hide participant names]

Participant Name	Enrollment Date	View History
<input type="checkbox"/> Blane , Ryan	06/24/2003	View History

Other caseloads being handled by CS TSTWKR

Participant Name	Program Name	Enrollment Date	View History
Blane , Ryan	Comm for Youth	06/24/2003	View History
Water , Hot	Comm for Youth	06/20/2003	View History
Blane , Ryan	Homeless Youth	06/24/2003	View History
Preyasi , Test	Homeless Youth	Pending	View History
Blane , Ryan	JJ Tit15 Delinq Prev	06/20/2003	View History
Consent , Test	Release Upon Request	06/25/2003	View History

CS TSTALL	[Click to view names of participant(s)]
Worker First	[Click to view names of participant(s)]

The **Participant Lookup** page was changed to default to search as "Sounds Like" instead of "Exact Match."

The **Preparing Participant for Intake** page has been modified. The "Intake Date" field is now blank and must be completed by the user. Previously, this date defaulted to the current date but could be edited. By changing this field to be blank, users will be more likely to correctly complete the field. **NOTE: Once this date is set, it can not be changed.**

The following changes were made to the **Program Enrollment** page:

- This page now allows a participant to be in a "pending" status.
 - i) When enrolling a participant in Homeless Youth, Title V, UDIS, or CCBYS-Non Mandated (any level of risk), upon saving the page, the participant's status will be "Pending" instead of "Active". The saved Program Enrollment screen is displayed, and this status is reflected in the "Status" field. To make the participant active, the user will need to complete the "Start/Certification Date" on the Program Enrollment screen. The "Start/Certification Date" is defined as the date the client became certified and was eligible to receive services as defined in the policies of the specific program. This field should be completed as applicable (immediately, or at such time when the participant actually becomes active in the program). Upon completing the "Start/Certification Date" and saving the screen, the participant will become active.

NOTE: Participants in a pending status who have not been assigned to a case worker will be displayed in the To Do List as an unassigned participant.
 - ii) When enrolling a participant in any other program, upon saving the **Program Enrollment** page, the participant's status will be "Active". The saved Program Enrollment screen is displayed, and this status is reflected in the "Status" field. The "Start/Certification Date" will default to the "Enrollment Date" and will not be editable.
- The "Referral Date" and "Initial Contact Date" fields are now blank and must be completed by the user. Previously, these fields defaulted to the current date but could be edited. By changing these fields to be blank, users will be more likely to correctly complete the fields with the correct date. **Note: The "Initial Contact Date" can not be changed after it is saved.**

Care Plan Overview

This new feature incorporates functionality to link assessments to specific programs, and to allow the system to focus on a care plan that supports multiple program enrollments. Numerous changes have been made to accommodate this new feature:

A new **Care Plan Overview** page has been added to the system. This page is accessed from the View page, and provides links to the new Enrollment-Assessment Relationship page (see below), Progress Notes, and other pages/functionalities that will be added in future deployments. The Care Plan Overview page also displays an overview of the programs in which a participant is active:



Name: *Robert Silver*
Cornerstone Id: *S416-61D8-8070-00* Gender: *Male* Date of Birth: *03/08/1988*

Care Plan Overview

[Enrollment-Assessment Relationship](#)

Care Plan

[Apply Direct Service Hours](#)

[Progress Notes](#)

[Close This Case](#)

Participant Enrollment Information

Program Name	Category	Status	Start Date	Term Date
Cmprhnsv Com Bas Srv	Non-Mandated High	Pending		
Delinq Prev	DP	Active	07/01/2003	
Unfd Delinq Intrv Srv	UDIS	Pending		

To accommodate the new Care Plan functionality, the following changes were made to **Assessments**:

- Assessments are no longer defined as “Initial”, “Reassessment” or “Closing” for a participant; instead these distinctions are made for assessments linked to each program. Therefore, a participant enrolled in two programs will have two initial assessments – one for each program. Depending on the situation, these initial assessments may in fact be the same assessment, or they may be different assessments.
- A participant can only have one incomplete assessment at any given time. A worker cannot start a new assessment until the incomplete assessment is finished.
- The “Assessments” link from the View page now functions in a different manner.
 - If a participant has no existing assessments, this link is used to add an assessment. After clicking on the “Assessments” link from the View page, the user will choose to “Add” an assessment, and will then be prompted to enter the date the assessment was initially administered. In a case where the assessment was administered over a weekend, but is not being entered into eCornerstone until the following work week, this allows the user to back-date the assessment to reflect the date it was actually administered. (The “Initial Administered Date” for all additional assessments will be the date the assessment was entered into eCornerstone. This is a system generated date that cannot be changed.)
 - If a participant has existing assessments, clicking on the “Assessments” link from the View page will display a listing of all assessments. The user can use this link to add additional assessments after one has been completed. If only completed assessments are present, the “Add” link will be present. If there is an incomplete assessment in this list, the “Add” link will not be available. In the event of an incomplete assessment, the user will be required to click the “YASI” link and complete the assessment before having the option to “Add” an assessment.

A new **Enrollment-Assessment Relationship** page is now available from the **Care Plan Overview** page. This new page displays all program enrollments for the participant (left side), and it lists all assessments and their completion status (in the Participant Assessment History box on the right side):

You are logged in as: **cststall**

Version: 1.1.2
[Version Detail](#)

[Lookup](#) | [View](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

Name: *Robert Silver*
 Cornerstone Id: *S416-61D8-8070-00* Gender: *Male* Date of Birth: *03/08/1988*

Enrollment-Assessment Relationship

Delinq Prev(DP)

Actively Enrolled Since: 07/01/2003

[Add an Initial Assessment](#)

[Add a Reassessment](#)

[Add a Closing Assessment](#)

Participant Assessment History

Type	Completion Date	Status	Result
YASI	06/26/2003	Completed	

[Create a New Assessment](#)

[RETURN TO OVERVIEW](#)

The Enrollment-Assessment Relationship page is used to link assessments to each program for a participant.

○ **Assessments:**

- If no assessments have been initiated for a participant, the user will see a "Create New Assessment" link in the Participant Assessment History box. Clicking on this link will begin the process of adding an initial assessment for the participant (just as if the user selected the "Assessments" link from the View page).
- If the participant has an incomplete assessment, it will be listed in the Participant Assessment History box. The status field serves as a hyperlink, and after clicking on the word "Incomplete", the system will display the incomplete assessment in edit mode so that the worker can modify or complete it.
- If the participant has only complete assessments, the user can click on the "Create a New Assessment" link, and proceed with adding an additional assessment for the participant.

○ **Programs:**

- The case worker is given the option to Add an Initial Assessment, Reassessment or Closing Assessment to each program, as appropriate. An initial assessment must be designated before a reassessment or closing assessment can be added.
- Upon clicking on any links to assign an assessment to a program, the system will display a list of all applicable assessments:
 - When designating an Initial Assessment for a specific program, the system will display all assessments dated thirty (30) days prior to the "Start/Certification Date," and all assessments completed after the "Start/Certification Date."
 - When designating a Reassessment for a specific program, the system will display all assessments dated within thirty (30) days of the current date, but will not include any

assessments that have already been designated as the Initial Assessment, Reassessment or Closing Assessment for the selected program.

- When designating a Closing Assessment for a specific program, the system will display all assessments completed within thirty (30) days prior to the "Status Date," and all assessments completed after the "Status Date." **Note: The Status Date is the date entered by the system at the time the enrollment was terminated.**
- Each program can have only one Initial and Closing assessment associated with it, but can have multiple reassessments. Again, it is possible for the assessments to overlap (e.g., an assessment from 6/23/2003 may serve as the closing assessment for one program and also serve as the initial assessment for a different program).

NOTE: All existing assessments must be linked to appropriate programs by August 15, 2003, to accommodate future system enhancements.

To Do List Changes

Changes have been made to the To Do list functionality to better define when messages are generated, and to whom they apply. These changes also reflect the changes in assessment management that resulted with the new functionality of the Care Plan Overview.

Missing Assessment message: This message is generated for the case worker to whom the participant is assigned, and indicates that an Initial Assessment has not yet been assigned to the program. The due date will be set for thirty (30) working days from the "Start Certification Date." Upon selecting this message (clicking on the hyperlink), the system will display the Enrollment-Assessment Relationship page. From this page, the case worker can assign a completed assessment as the Initial Assessment for the selected program.

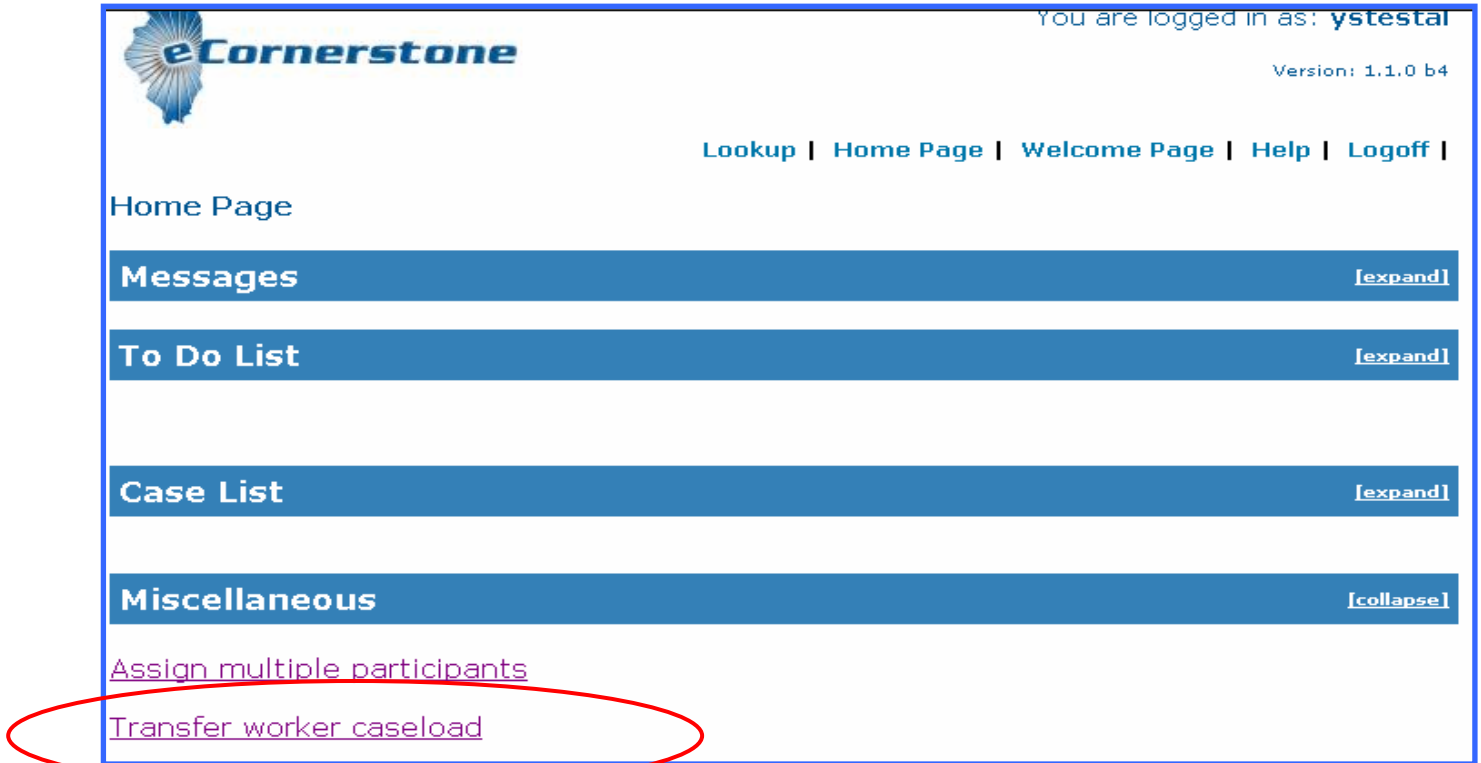
Reassessment message: This message is generated for the case worker to whom the participant is assigned, and indicates that an assessment has not been completed in the last 76 days. The 76 days is calculated from the "Completion Date" of the last assessment linked to the selected program. Upon selecting this message (clicking on the hyperlink), the system will display the Enrollment-Assessment Relationship page. From this page, the case worker can assign a completed assessment as a Reassessment for the selected program.

Closing Assessment message: This message is generated for the case worker to whom the participant is assigned, and indicates that a Closing Assessment has not yet been assigned to the program. The due date will be based on the "Status Date," and will be set for thirty (30) working days from that date. Upon selecting this message (clicking on the hyperlink), the system will display the Enrollment-Assessment Relationship page. From this page, the case worker can assign a completed assessment as a Closing Assessment for the selected program.

Transfer Worker Caseload

A new feature has been added to eCornerstone to allow an authorized user to transfer a worker's entire caseload by program to another worker. If a worker has caseloads in multiple programs, the authorized user can transfer any specific program caseload, or all program caseloads if desired. This feature offers an alternative method to assigning each participant in the worker's caseload to another worker one at a time.

The "Transfer Worker Caseload" is available on the Home Page under the "Miscellaneous" section:



eCornerstone You are logged in as: **ystestal**
Version: 1.1.0 b4

[Lookup](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

Home Page

Messages [\[expand\]](#)

To Do List [\[expand\]](#)

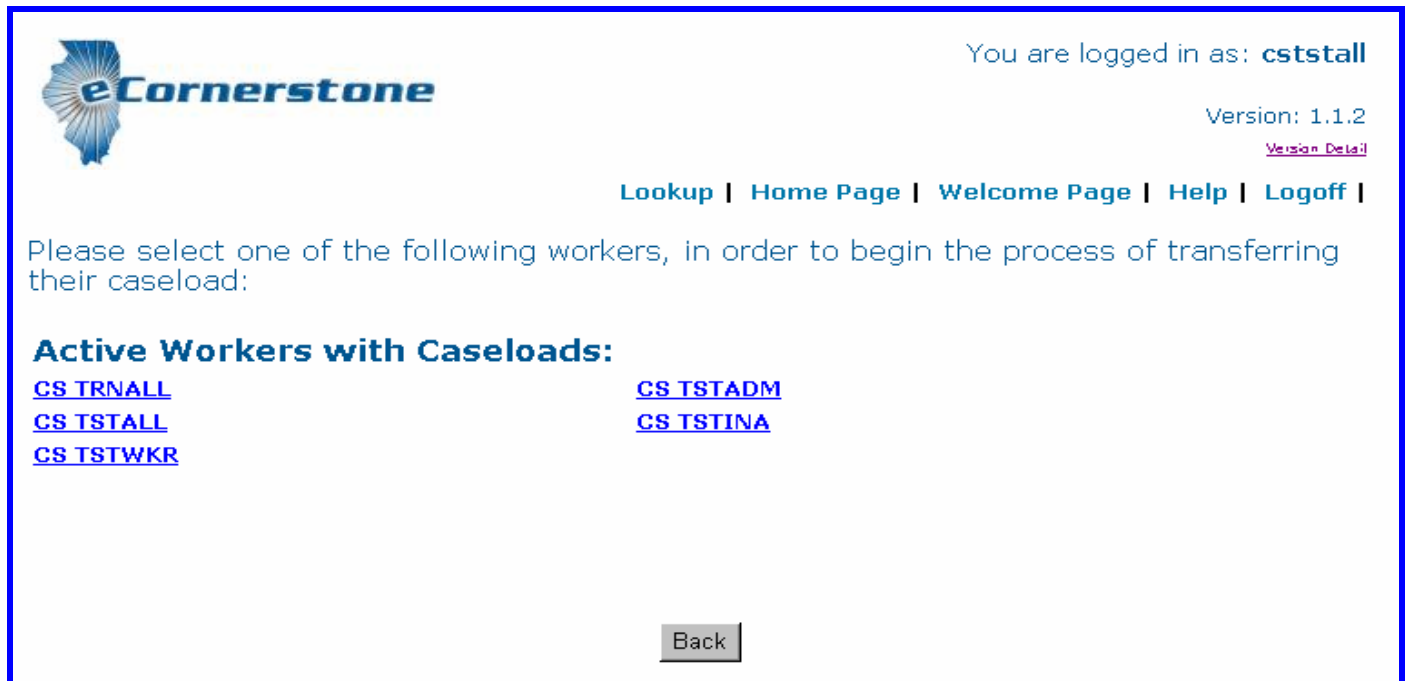
Case List [\[expand\]](#)

Miscellaneous [\[collapse\]](#)

[Assign multiple participants](#)

[Transfer worker caseload](#)

After selecting this link, the Active Workers with Caseloads page is displayed:



eCornerstone You are logged in as: **cststall**
Version: 1.1.2
[Version Detail](#)

[Lookup](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

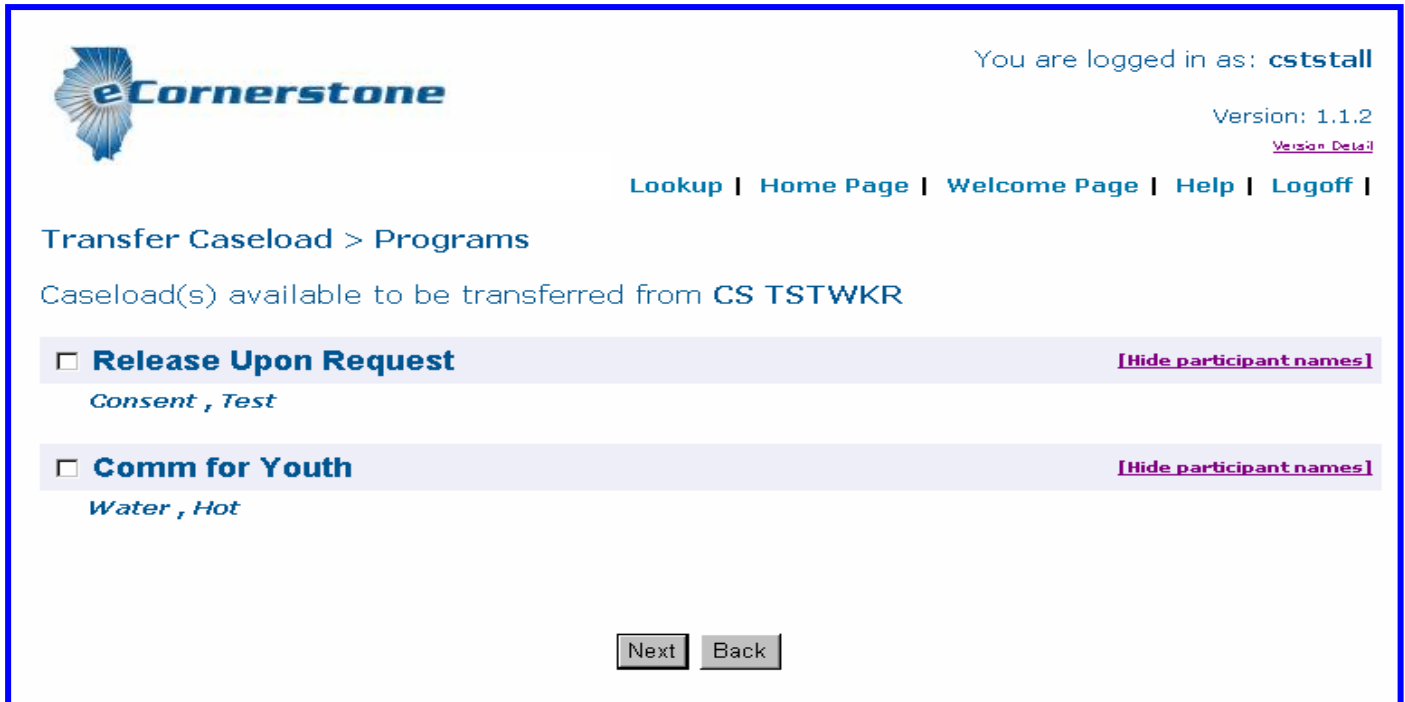
Please select one of the following workers, in order to begin the process of transferring their caseload:


Active Workers with Caseloads:

[CS TRNALL](#) [CS TSTADM](#)
[CS TSTALL](#) [CS TSTINA](#)
[CS TSTWKR](#)

[Back](#)

To transfer a worker's caseload, click on the name of the worker. The system displays the caseload(s) by program available to be transferred from the selected worker:



 You are logged in as: **cststall**
Version: 1.1.2
[Version Detail](#)

[Lookup](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

Transfer Caseload > Programs

Caseload(s) available to be transferred from **CS TSTWKR**

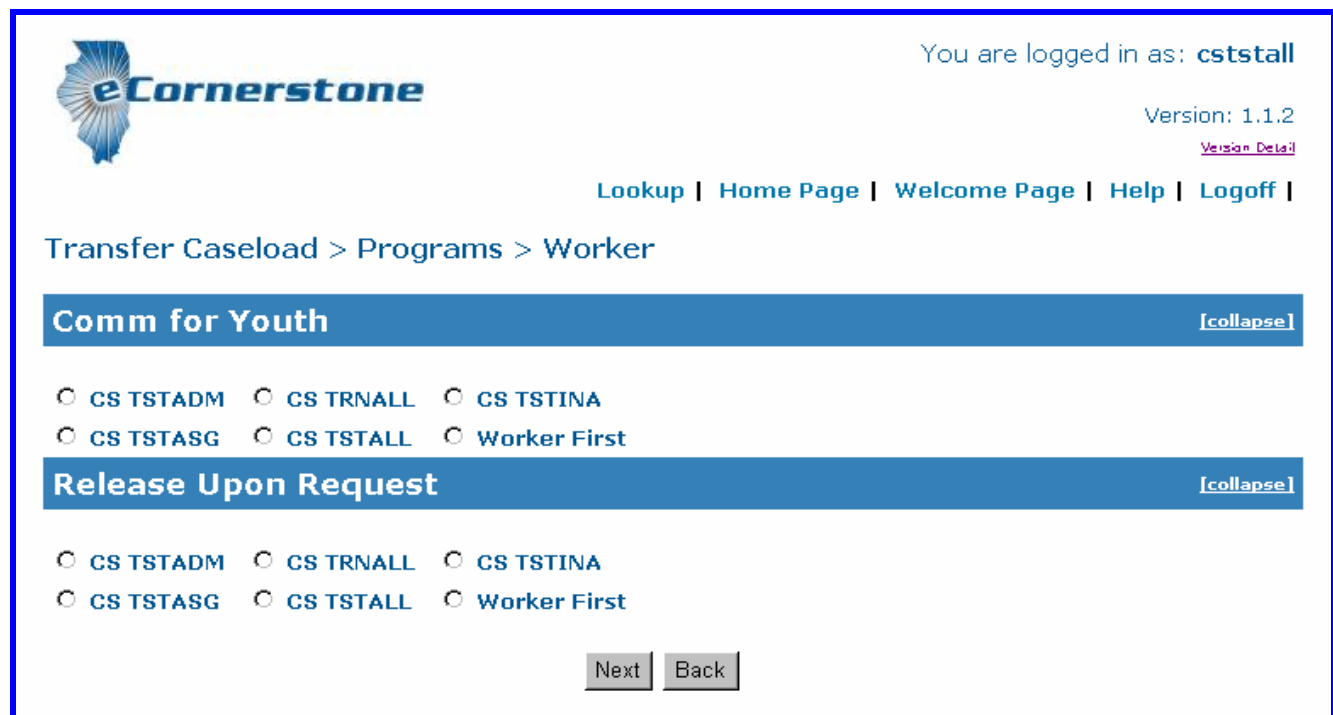
Release Upon Request [\[Hide participant names\]](#)
Consent , Test


Comm for Youth [\[Hide participant names\]](#)
Water , Hot

If the worker has a caseload in more than one program, all caseloads will be listed. The system provides a link to view (expand) or hide (collapse) the names of all participants in each caseload.

To transfer the caseload, click in the check box next to the appropriate program(s) to be transferred. A check mark will appear in the box. Click the "Next" button to continue.

The system then displays a list of all active workers qualified in each of the programs selected:



 You are logged in as: **cststall**
Version: 1.1.2
[Version Detail](#)

[Lookup](#) | [Home Page](#) | [Welcome Page](#) | [Help](#) | [Logoff](#) |

Transfer Caseload > Programs > Worker

Comm for Youth [\[collapse\]](#)

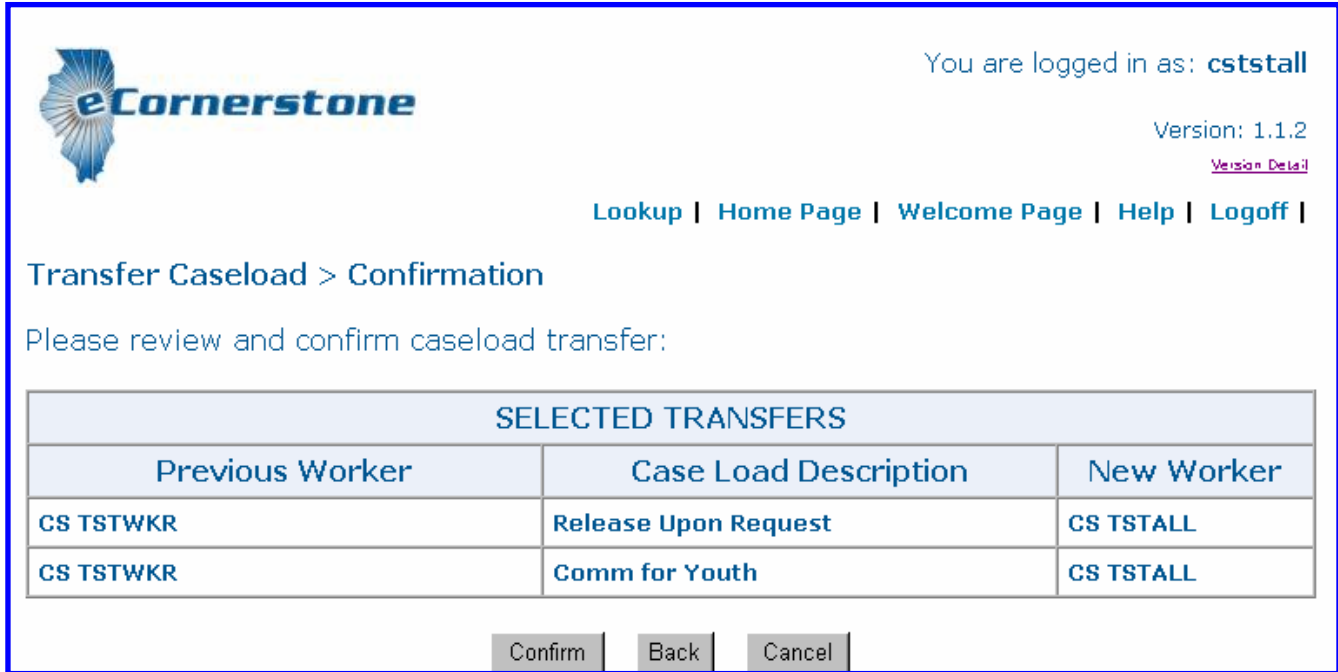
CS TSTADM CS TRNALL CS TSTINA
 CS TSTASG CS TSTALL Worker First

Release Upon Request [\[collapse\]](#)

CS TSTADM CS TRNALL CS TSTINA
 CS TSTASG CS TSTALL Worker First

To select the worker to whom the caseload will be transferred, click in the circle (radio button) next to the workers name. After completing this for all programs selected, click on the "Next" button.

A confirmation page is displayed:



The screenshot shows the eCornerstone system interface. At the top left is the eCornerstone logo. At the top right, it says "You are logged in as: cststall" and "Version: 1.1.2" with a link for "Version Detail". Below this is a navigation menu with links for "Lookup", "Home Page", "Welcome Page", "Help", and "Logoff". The main heading is "Transfer Caseload > Confirmation". Below the heading is the instruction "Please review and confirm caseload transfer:". A table titled "SELECTED TRANSFERS" contains two rows of transfer data. At the bottom of the table are three buttons: "Confirm", "Back", and "Cancel".

SELECTED TRANSFERS		
Previous Worker	Case Load Description	New Worker
CS TSTWKR	Release Upon Request	CS TSTALL
CS TSTWKR	Comm for Youth	CS TSTALL

From the confirmation page, the user can:

- Click on the "Back" button to return to the previous page
- Click on the "Cancel" button to cancel all activities and return to the Home Page
- Click on the "Confirm" button to confirm the changes and return to the Active Workers with Caseloads page

Please note that before a worker can be terminated in the system (using the new User Administration feature), the worker's active caseloads must first be transferred.