THEO Data System Manual

Tracking Home Visiting Effectiveness in Oregon

You can get this document in other languages, large print, braille or a format you prefer. Contact the Oregon Health Authority at 971-673-1222 or email theo.support@dhsoha.state.or.us. We accept all relay calls or you can dial 711.

All client names and personal identifies contained in this document and associated screenshot images are fictitious and created for instructional purposes. No association with a real person identified by these example names and/or example identifiers exists.

Contents

1.0 Getting Started and Password Maintenance

1.1 THEO Application Support

This manual was created to help you learn how to use the THEO data system. For questions or to give feedback, please contact THEO Application Support.

Email:	theo.support@dhsoha.state.or.us
Hours:	8:00 am – 5:00 pm, Monday through Friday
Website:	healthoregon.org/theo

When to contact application support:
- Whenever you cannot do something in THEO that you need to do
- When you are not able to log in on your own
- When you have not logged in for over 60 days, and you see a message that says your account is locked
- When you make five unsuccessful attempts to log in and you see a message that says your account is locked
- Whenever you have unanswered questions about THEO
- Whenever you have feedback about THEO

1.2 Requirements for using THEO

To use the THEO system, you will need a computer, internet access, an internet browser that is compatible with THEO, and a login. Training resources are available on the THEO website.

Internet browsers that are compatible with THEO include recent versions of these browsers:
- Microsoft Edge
- Mozilla Firefox
- Google Chrome
- Apple Safari
- Opera

Microsoft has ended support for the browser Internet Explorer, so this browser is not recommended for use with THEO. Users who work in a Windows environment should use recent versions of Microsoft Edge, Mozilla Firefox, or Google Chrome. Users who work on Apple devices should use recent versions of Apple Safari, Opera, Google Chrome, or Mozilla Firefox.

THEO cannot be used offline. You must have access to the internet to use THEO.

1.3 Log in to your account

After you have signed a user agreement, and your supervisor or super user has signed and submitted your login request form, THEO will email you an invitation to log in to your account.

The steps that follow in **Section 1.3.1** describe how to activate your account and log in to THEO for the first time. The steps in **Section 1.3.2** describe how to log in to THEO after you have signed in to THEO for the first time.

1.3.1 Activate your THEO account and log in for the first time

THEO requires you to activate your account the first time you log in. You will receive an email notification at your work e-mail address that contains a link to the website where you will log in (Figure 1).
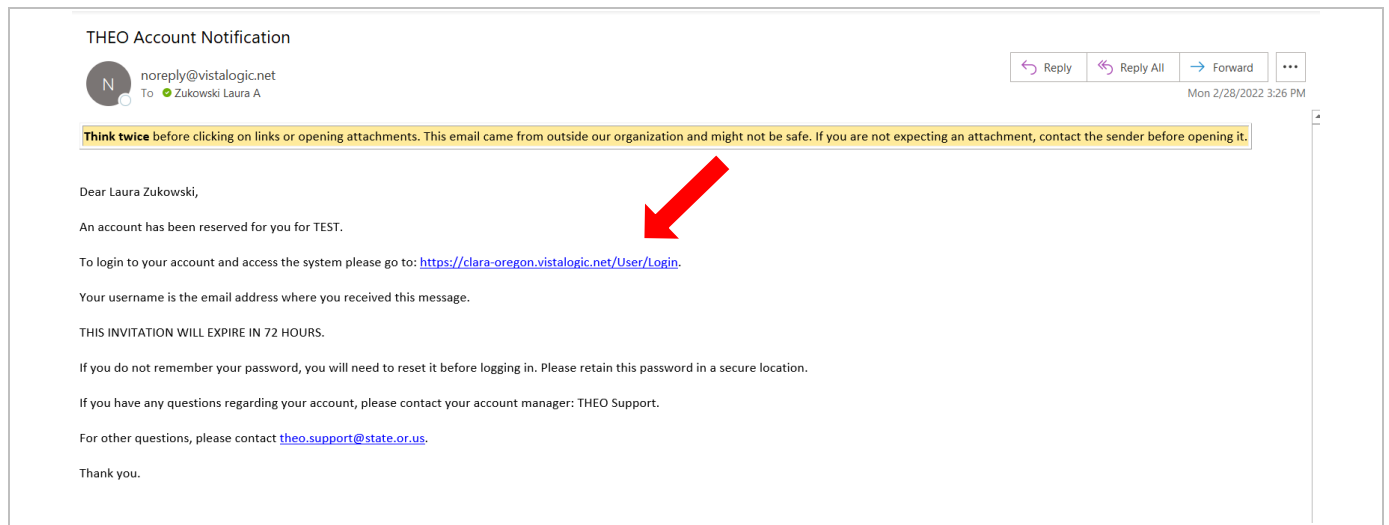

Figure 1: THEO Account Notification email

- Click on the link in the e-mail, and the THEO Login screen opens in your default browser (Figure 2).

  Warning: The row of browser icons at the bottom of the login screen are the internet browsers that are compatible with THEO (Figure 2). If you use a browser that is not compatible with THEO, parts of your screen may be missing or may not work correctly. Mouse over each icon to see a label with the name of each internet browser. Recent versions of these internet browsers are compatible with THEO:

    o Microsoft Edge
    o Mozilla Firefox
    o Google Chrome
    o Apple Safari
    o Opera

  Microsoft Internet Explorer is obsolete and no longer works with THEO. (Microsoft Edge is the free default browser in current versions of Windows.)

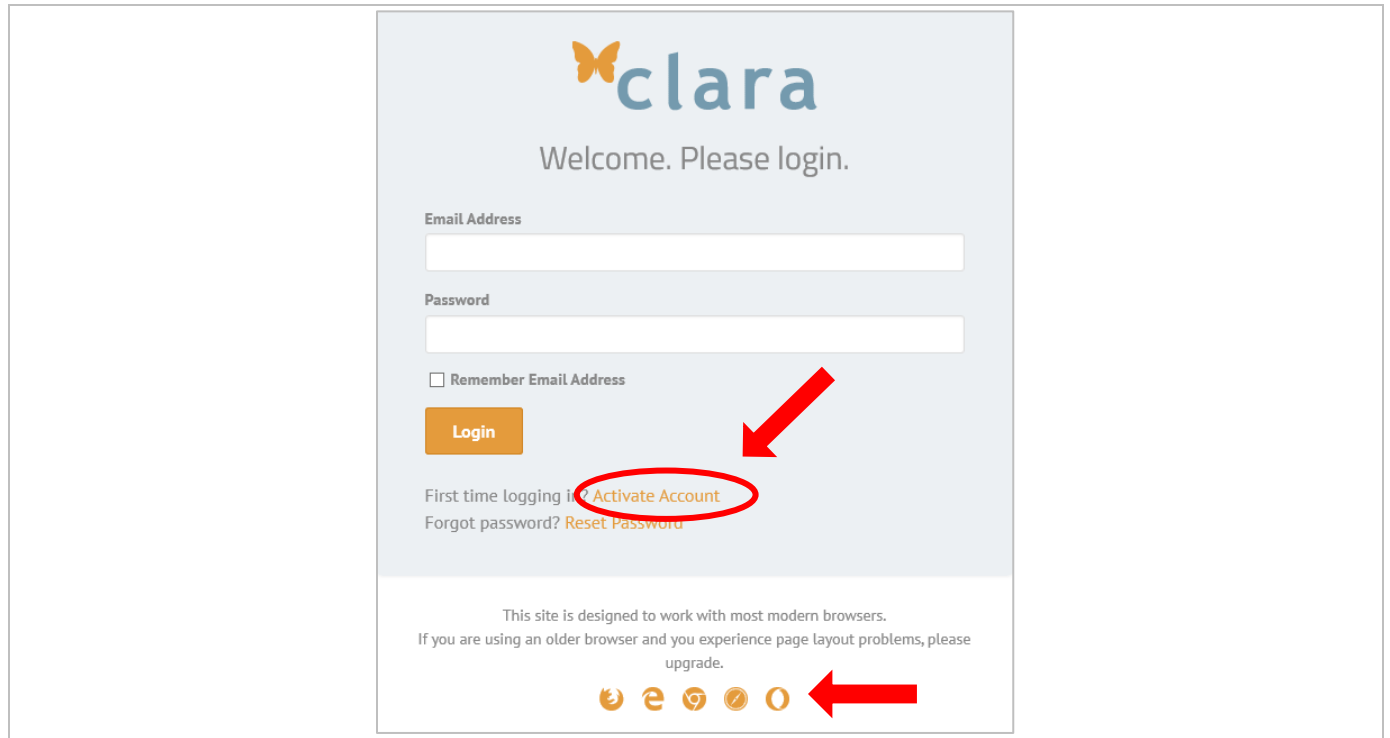- Click on the orange Activate Account link on the THEO Login screen (Figure 2).

Figure 2: THEO Login screen

- The Activate Your Account screen opens (Figure 3).
- Enter:
  - your work Email address, and
  - a Password that includes at least 9 characters and one special character, for example (!, @, #, $, %, ^, *). Upper case and lower case letters, numbers, and special characters are allowed.
- Confirm your password, by typing your password again.
- Click on the orange Activate Account button at the bottom of the screen.
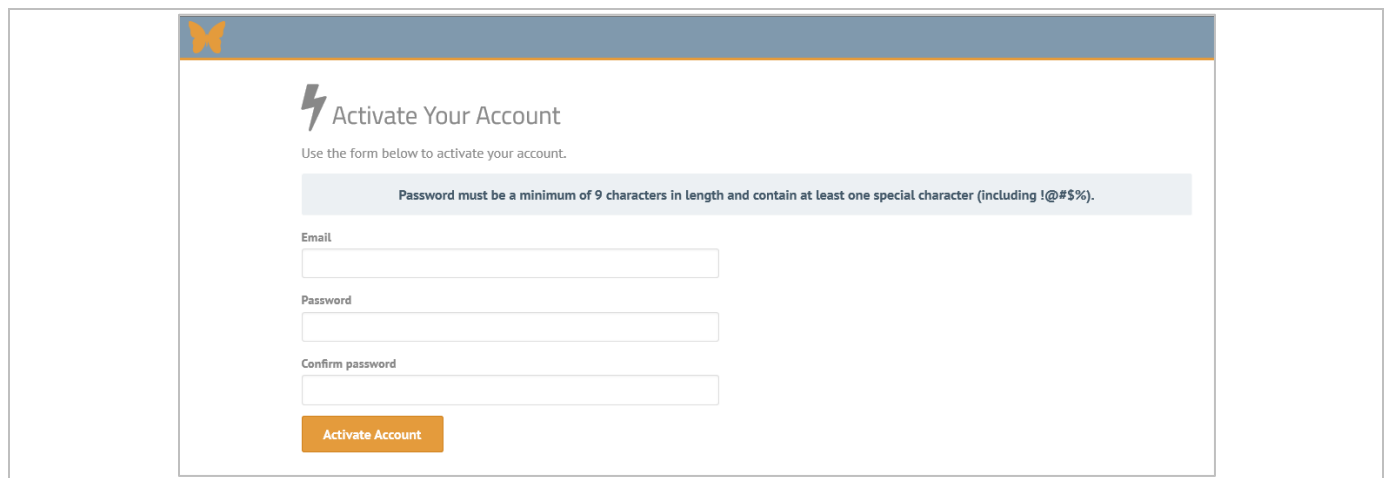

Figure 3: Activate Your Account screen

- THEO login page opens (Figure 4).
- Enter your work Email address and your new Password.
- Click on the Remember Email Address checkbox and the orange Login button.
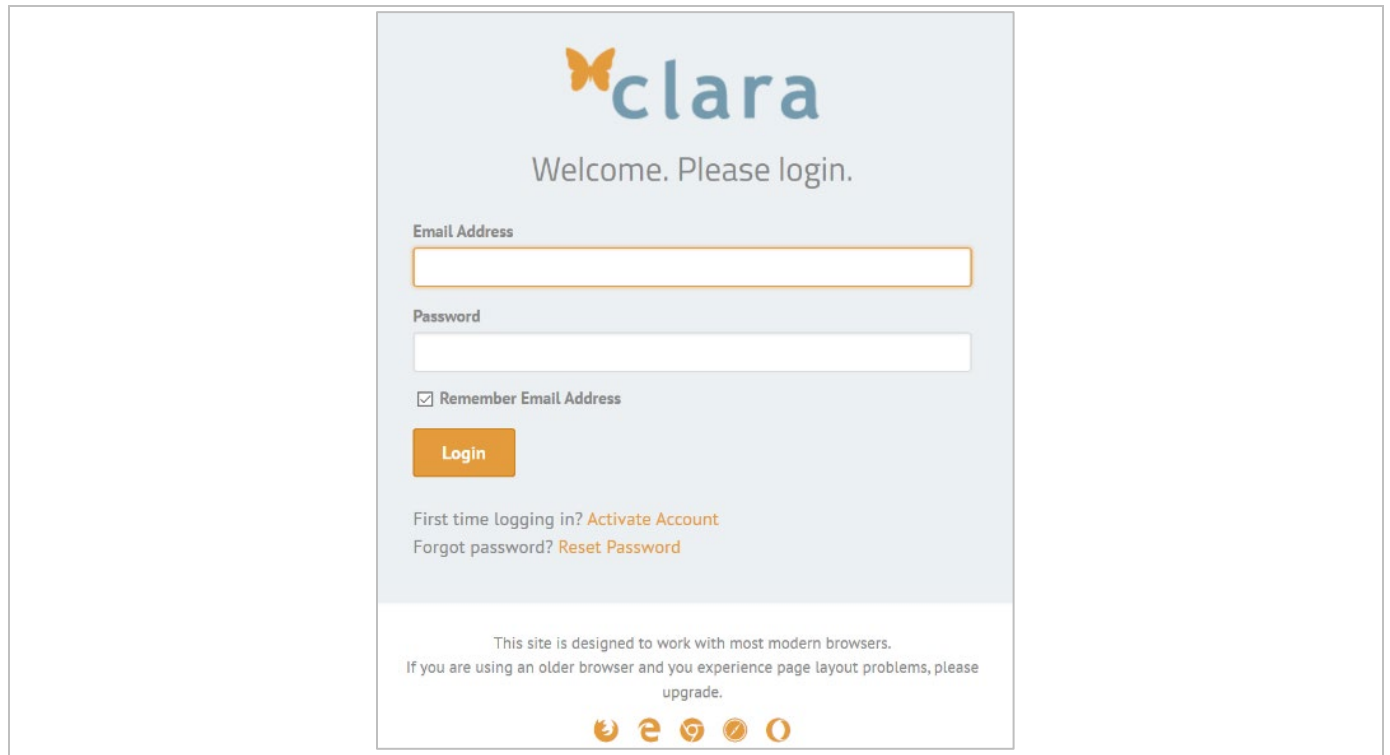

Figure 4: THEO Login page

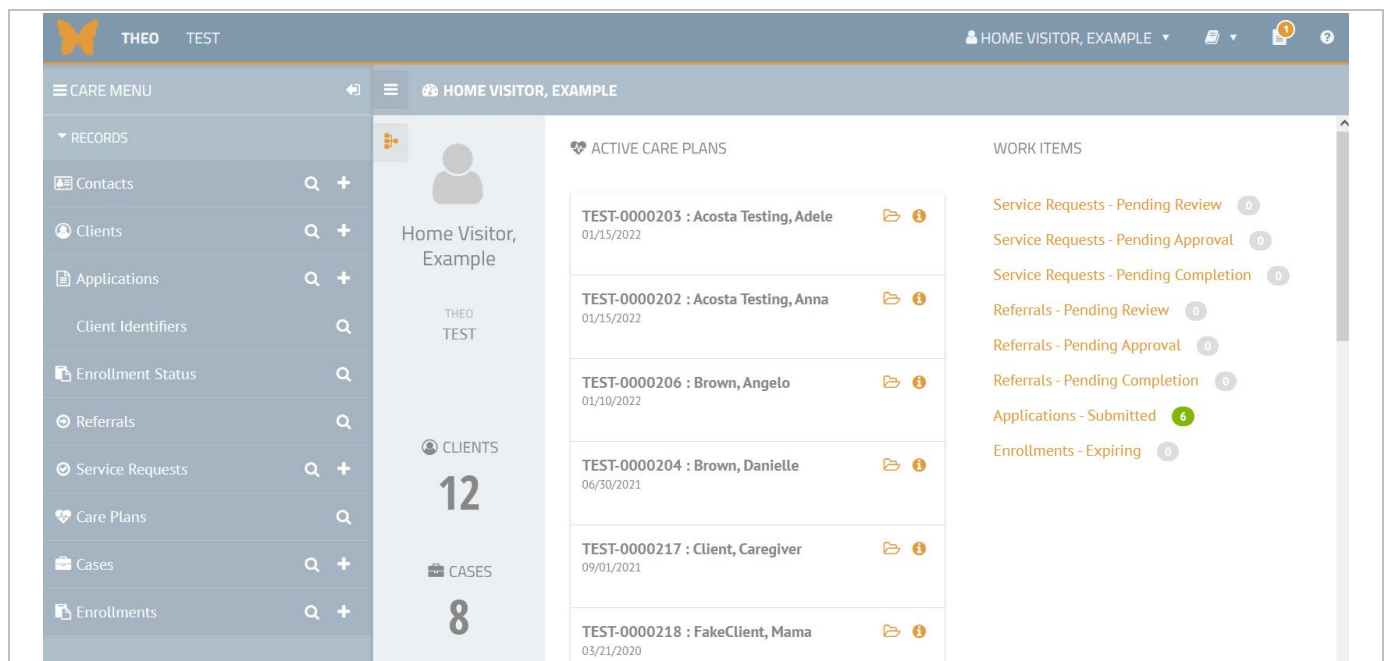- The THEO dashboard opens (Figure 5). You are now in the THEO database.

Figure 5: THEO dashboard

1.3.2 Log in to THEO after your account is activated

- After your login is activated, you can log in to THEO at any time by opening your browser and going to the website for the THEO Login Page –
  https://clara-oregon.vistalogic.net/   Bookmark the page or save a desktop link.
- The THEO Login screen opens. Enter your work Email Address and your Password (Figure 1).
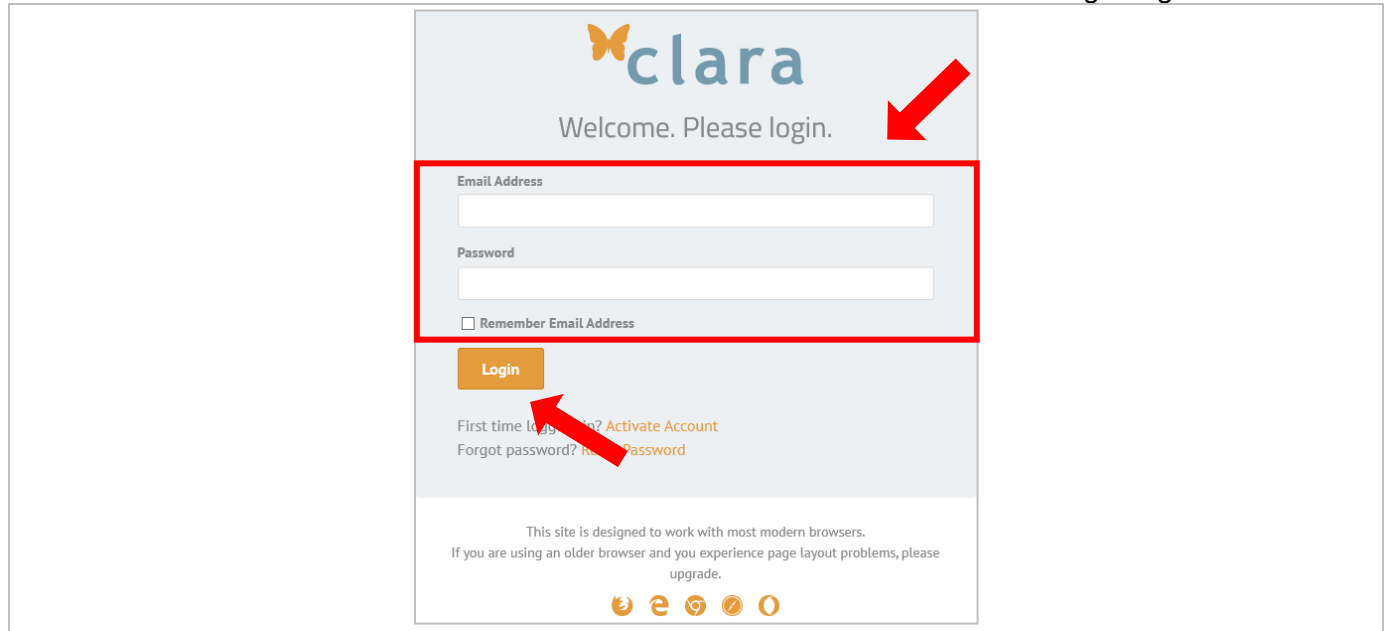- Click on the Remember Email Address checkbox to check it. Click on orange Login button

Figure 1: THEO Login screen

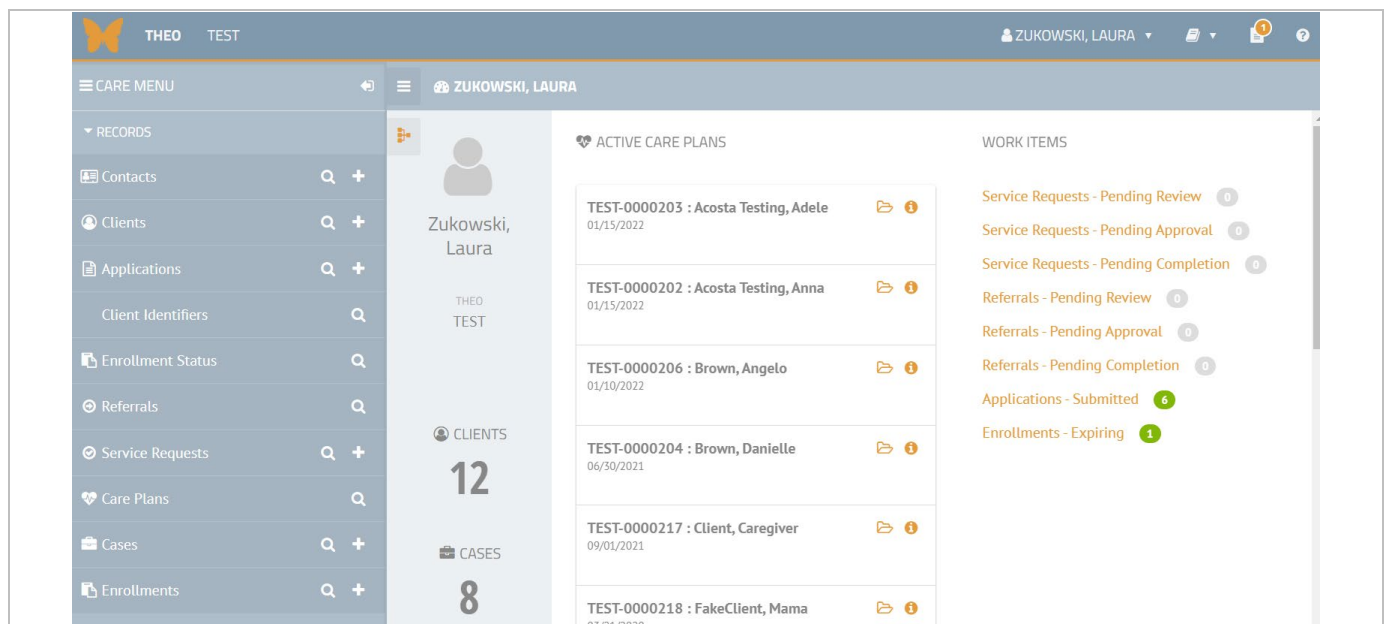- Your THEO dashboard opens (Figure 2). You are now in the THEO database.

Figure 2: THEO dashboard

1.4 Password maintenance

You can change your password yourself, without having to contact application support. In this section, you will learn how to reset your password when you forget it (**Section 1.4.1** and what to do when THEO shows you a message that says it's time for you to reset your password (**Section 1.4.2**).

1.4.1 Reset your password when you forget your password

If you forget your password, you can reset your password from the login screen.

- Open your compatible web browser and go to the THEO Login page –
  https://clara-oregon.vistalogic.net
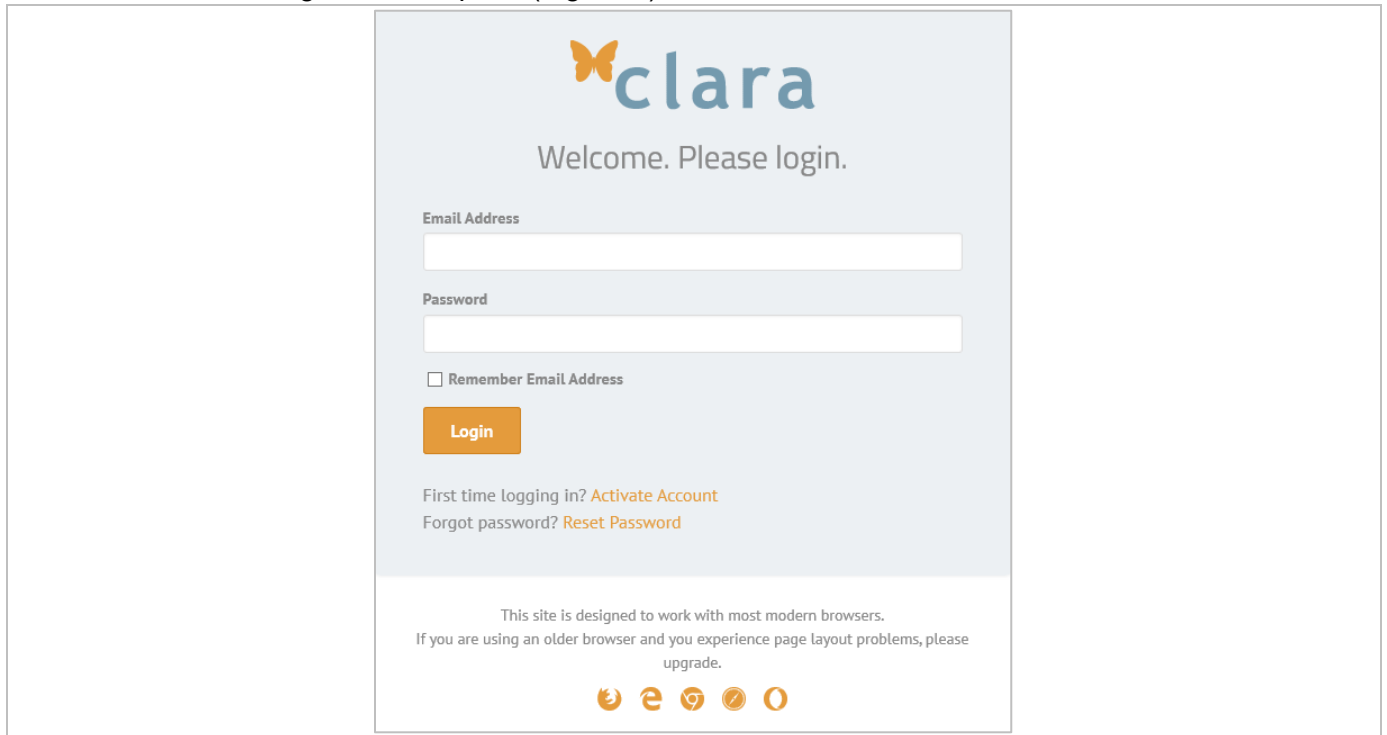- The THEO Login screen opens (Figure 1).

Figure 1: THEO Login screen

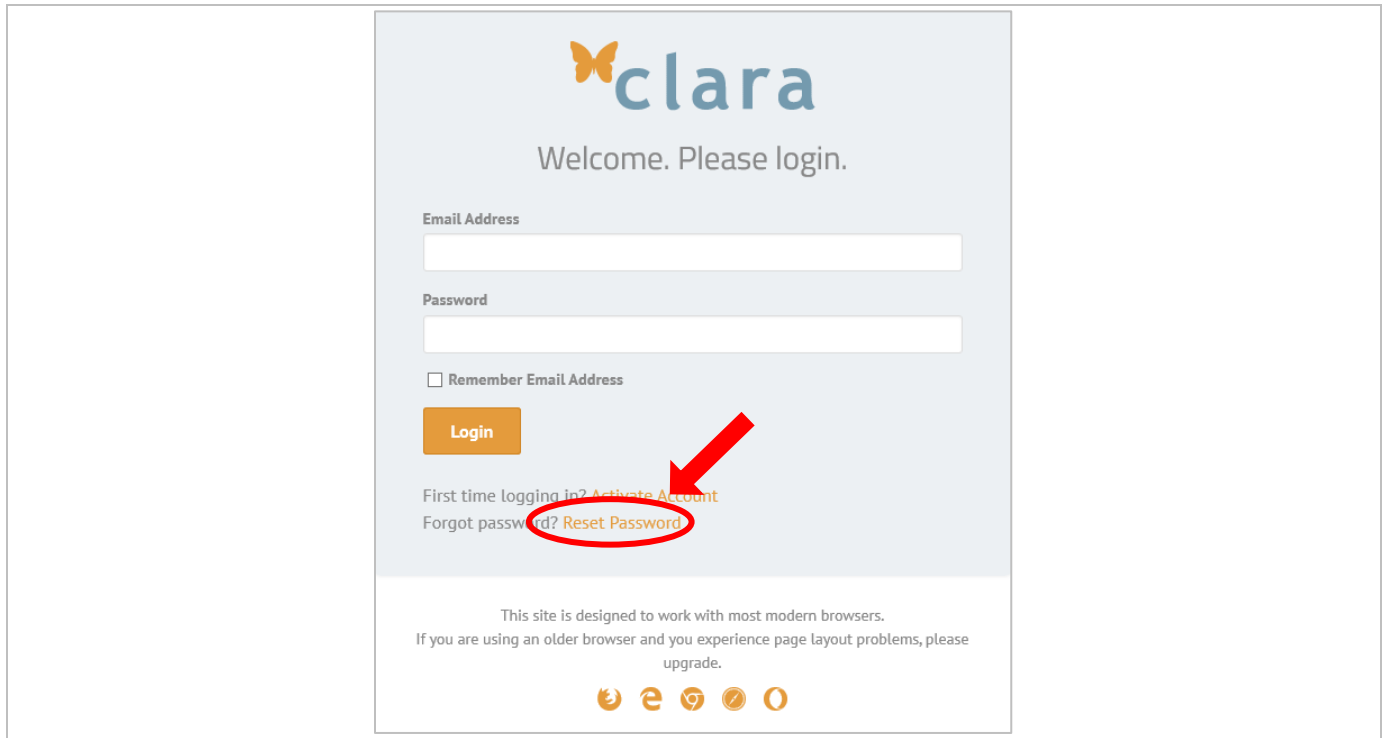- Click on the orange Reset Password link (Figure 2).

Figure 2: THEO Login screen – Reset Password link

- The Reset Your Password screen opens (Figure 3).
- Enter your work Email Address and click on the orange Reset Password button.
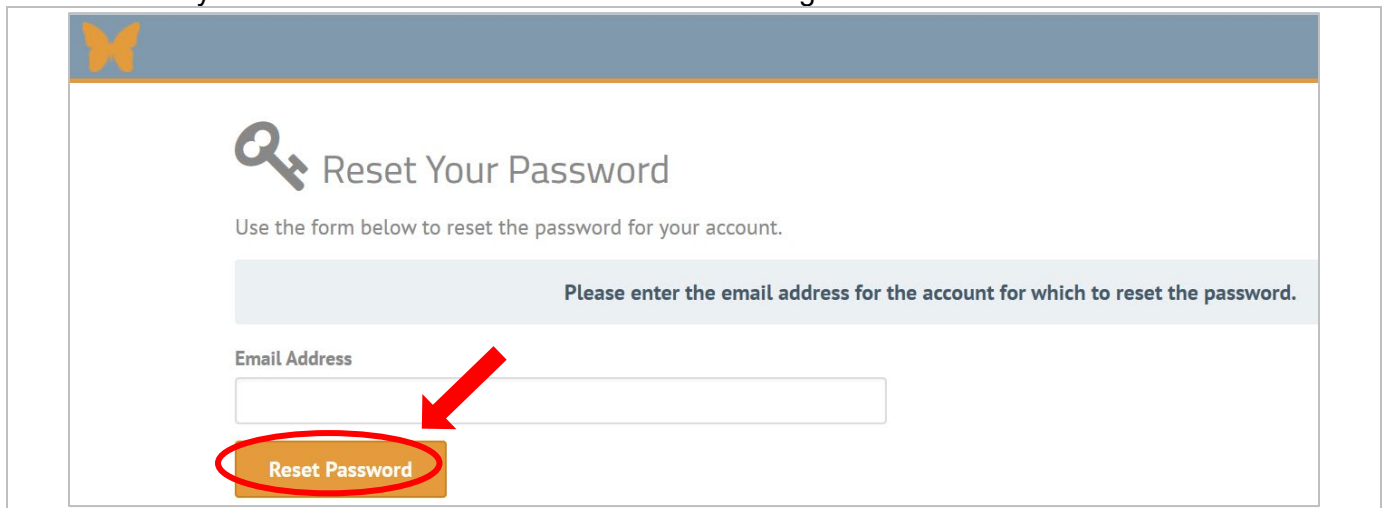

Figure 3: Reset Your Password screen

- The Forgot Password Confirmation screen opens and tells you to check your work email Inbox for a message to reset your password (Figure 4).
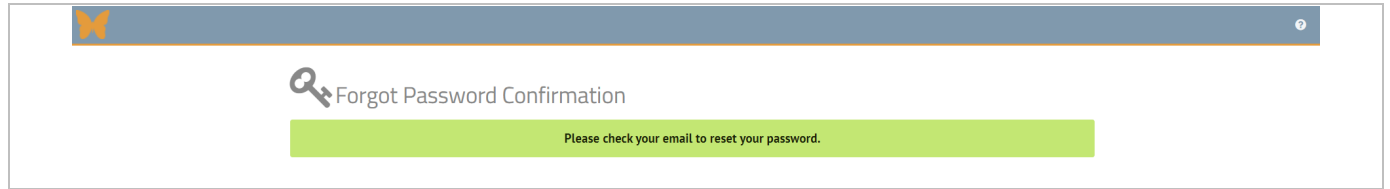

Figure 4: Forgot Password Confirmation screen

- Click on the Reset my account link in the email (Figure 5).
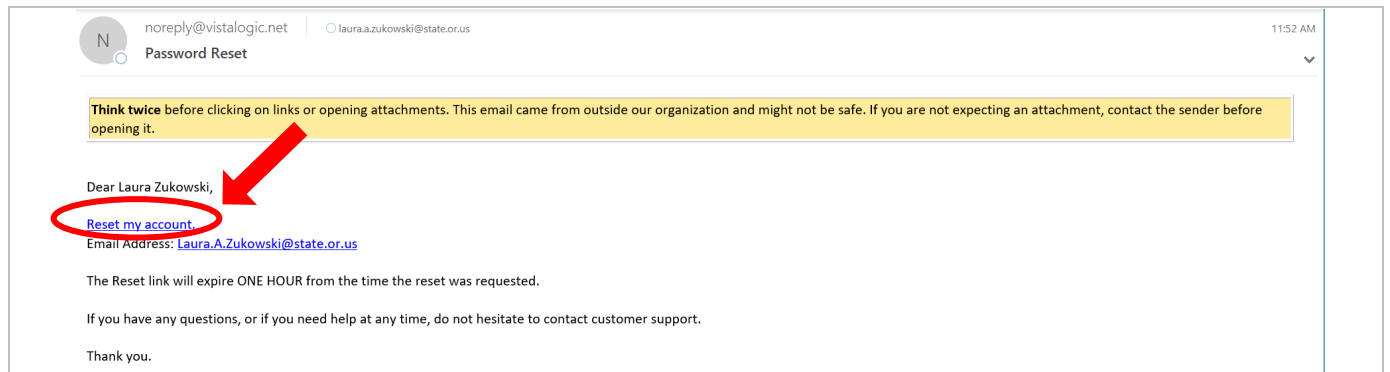

Figure 5: Password Reset email

- The Reset Your Password screen opens (Figure 6).
- Enter:
  - your work Email address,
  - a Password that you have not used in THEO already and that includes at least 9 total characters and at least one special character, for example (!, @, #, $, %, ^, *), and
- Enter your password a second time in the Confirm password field.
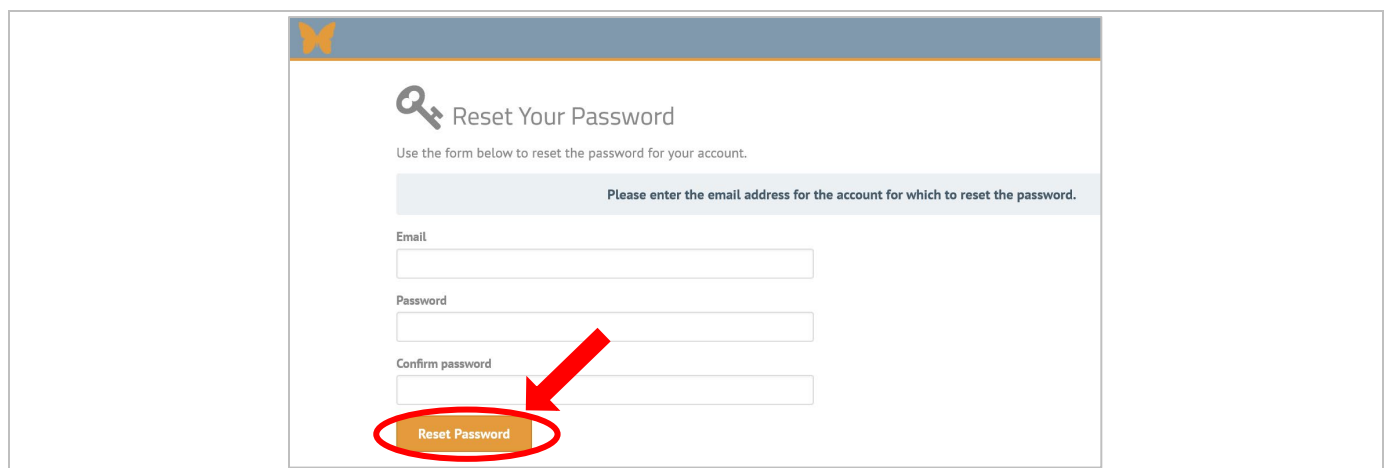- Click on the orange Reset Password button.

Figure 6: Reset Your Password screen

- The Reset Password Confirmation screen opens (Figure 7). Click on the orange click here to log in link.
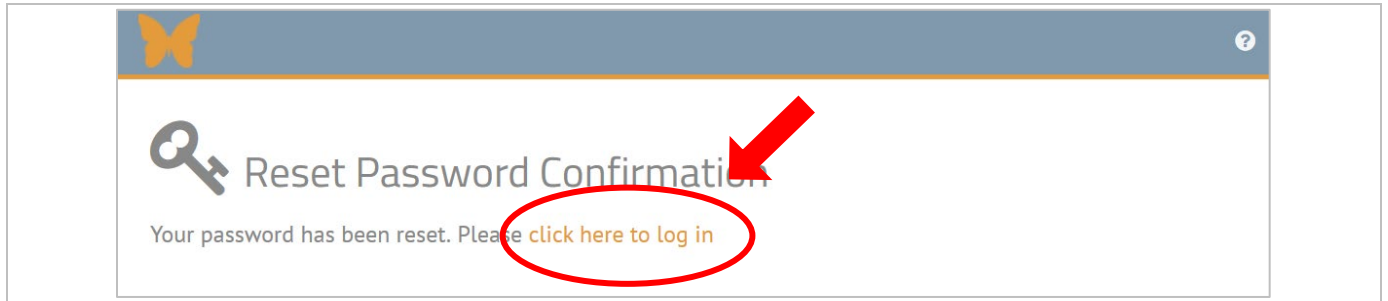

Figure 7: Reset Password Confirmation

- The THEO login screen opens (Figure 8).
- Enter your:
    - work Email address
    - new Password

- Click on the Remember Email Address checkbox to check it.
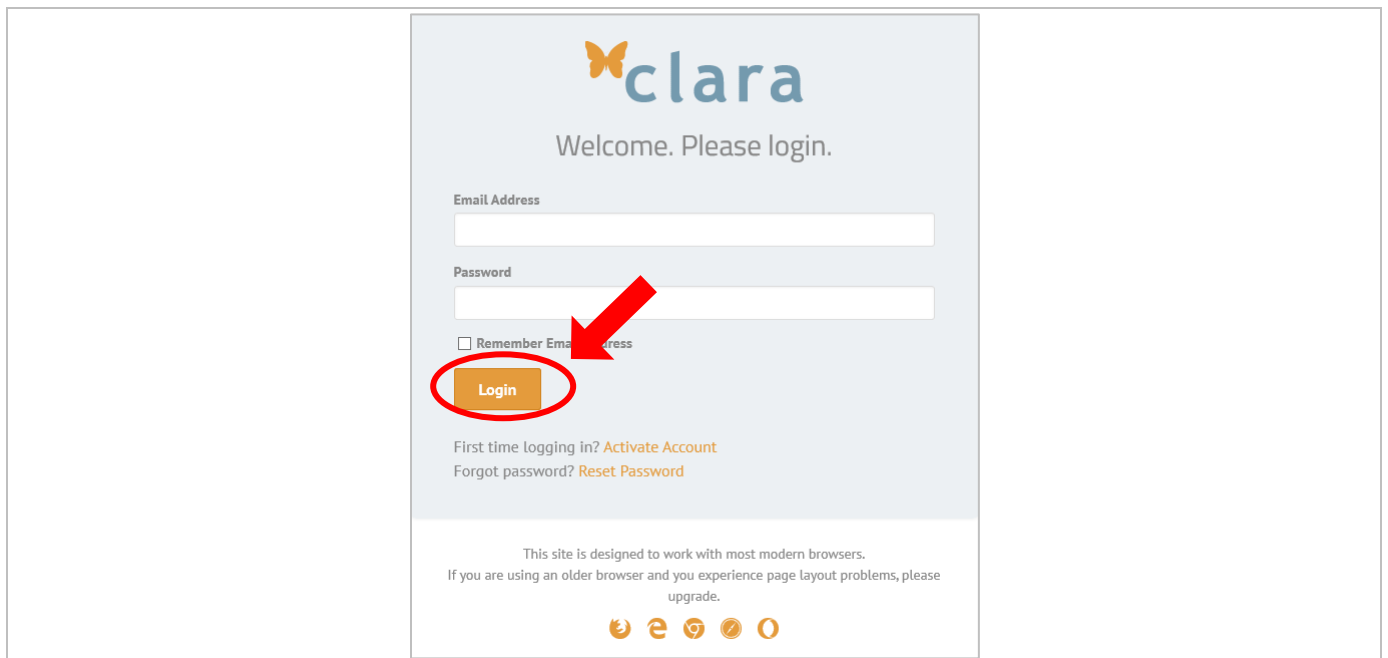- Click on the orange Login button.

Figure 8: THEO Login screen

- After resetting your password, you are required to verify your identity. The Send 2-step Verification Code screen opens (Figure 9). Click on the orange Submit button.
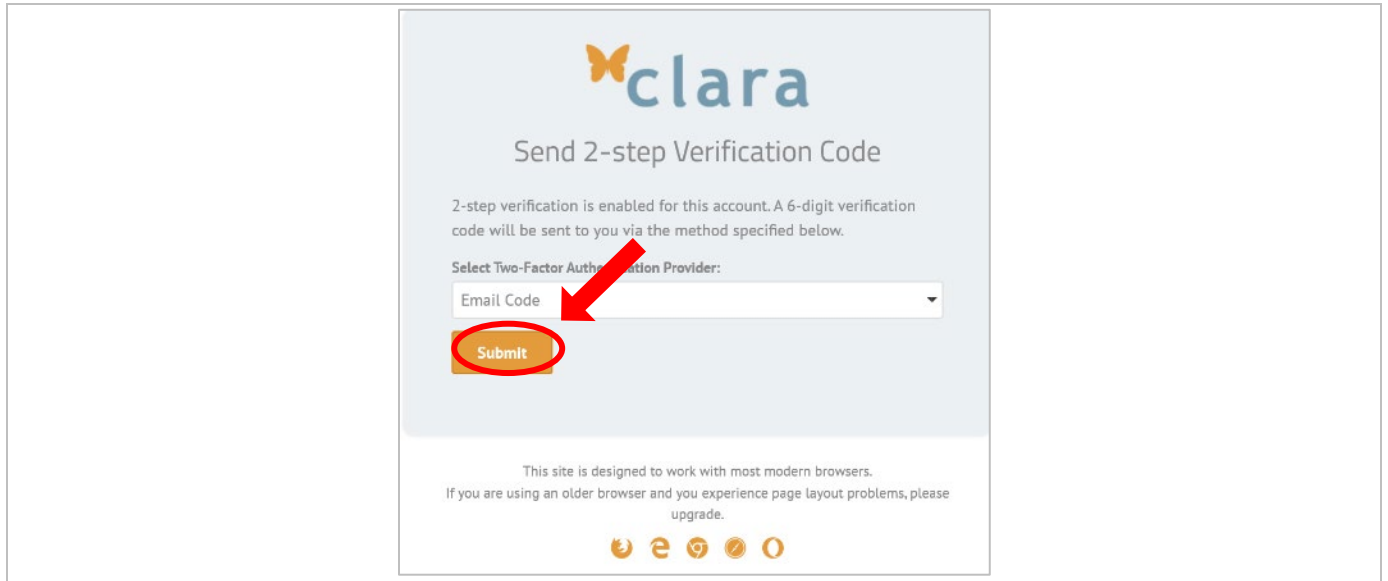

Figure 9: Send 2-step Verification Code screen

- The Enter 2-step Verification Code screen opens with a message that a 6-digit verification code has been sent to your work email address (Figure 10).
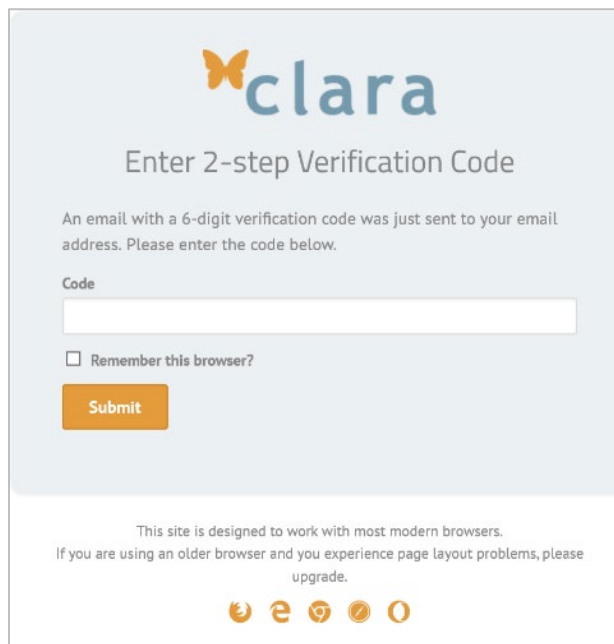

Figure 10: Enter 2-step Verification Code screen

- As soon as possible, go to your work email account and open an email from Noreply@vistalogic.net with the Subject, "Security Code."

  o NOTE: The code expires after three minutes. If you enter the verification code into THEO after three minutes, you will get a message saying, "invalid code" and you will need to click the orange Submit button again to send a new verification code to your email account (Figure 9, above).

- Copy the 6-digit security code in the email (Figure 11). If the email doesn't show up within a minute, check your email account's Junk and Spam folders.
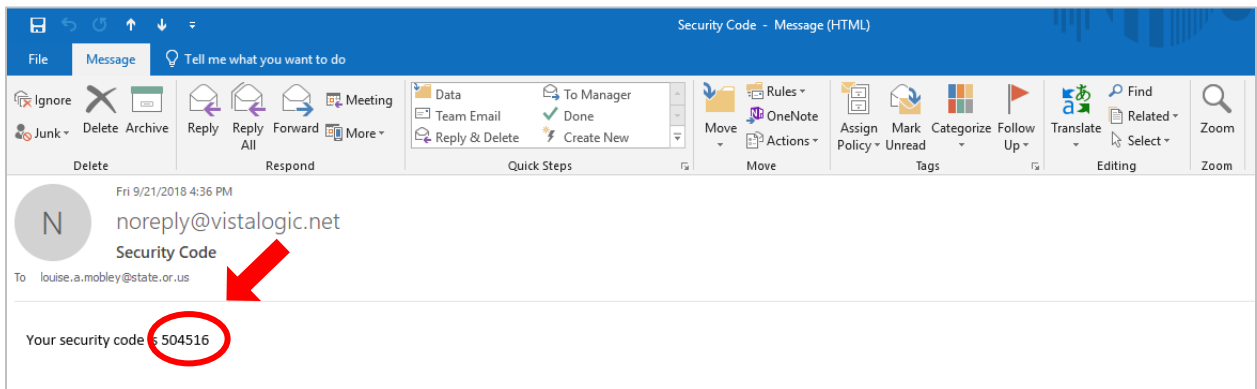

Figure 11: Security Code email

- In the Code field on the Enter 2-step Verification Code screen (Figure 12), type or paste the 6-digit security code from your email message.
- Click on the Remember this browser? to select it. This will stop THEO from making you repeat the verification steps every time you log in.
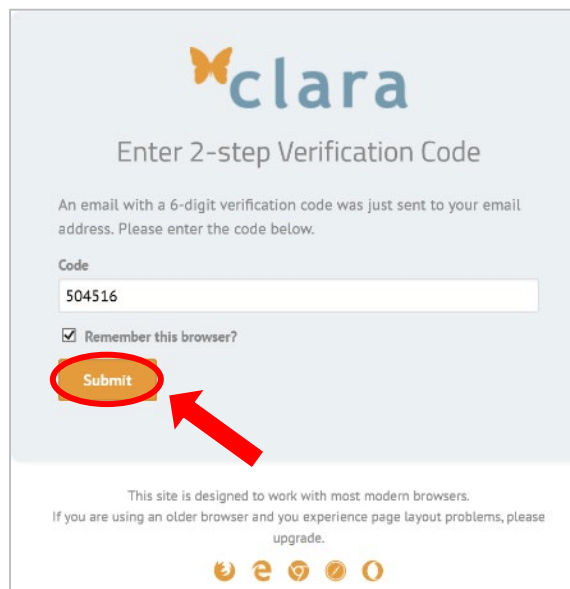- Click on the orange Submit button.

Figure 12: 2-step Verification Code

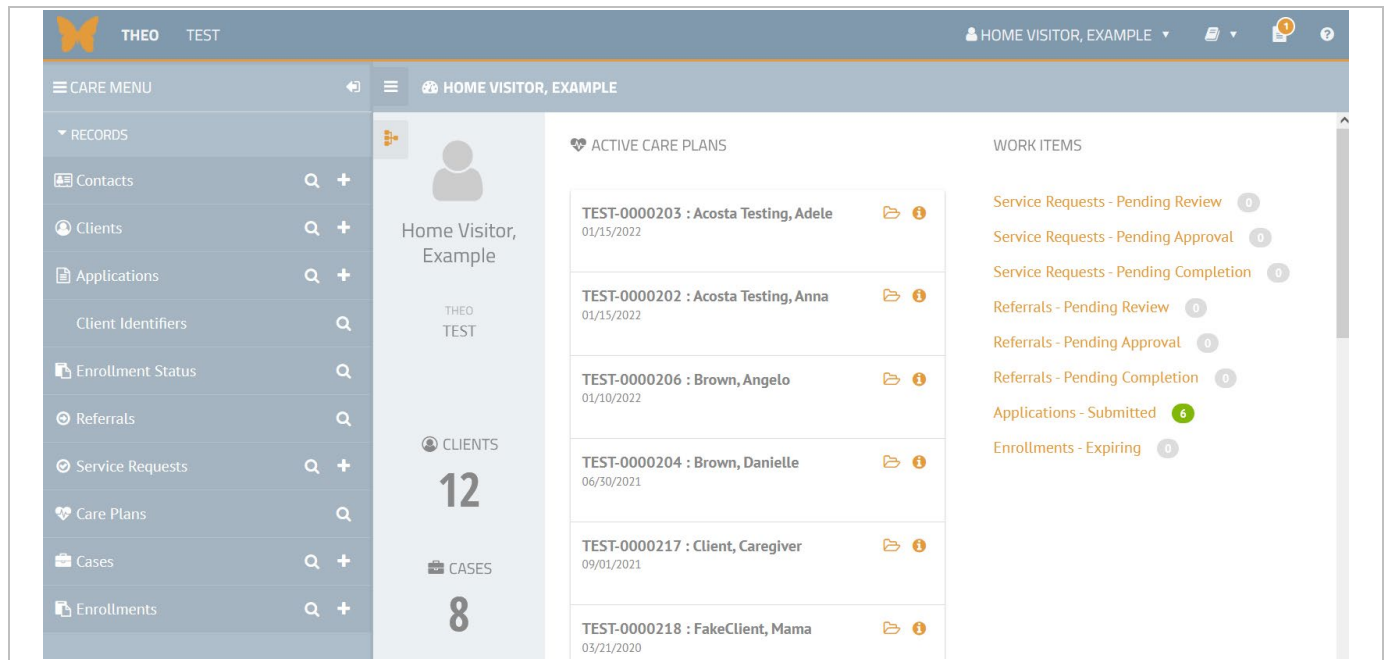- The THEO dashboard opens (Figure 13). You are now in THEO.

Figure 13: THEO dashboard

1.4.2 Change your password every 60 days

THEO requires that you log in at least once every 60 days and that you change your password every 60 days. Keep your account active by logging in regularly and by resetting your password when THEO shows a notice onscreen that says your password will expire soon.

If your account locks or deactivates, your super user or supervisor will need to give permission before your account will be reactivated. Contact THEO Application Support if you need help logging in.

> **Email:** theo.support@dhsoha.state.or.us
>
> **Hours:** 8:00 am – 5:00 pm, Monday through Friday
>
> **Website:** healthoregon.org/theo

- To change your password when you are already logged in to THEO, mouse over your name in the top right area of the Title bar (Figure 1).
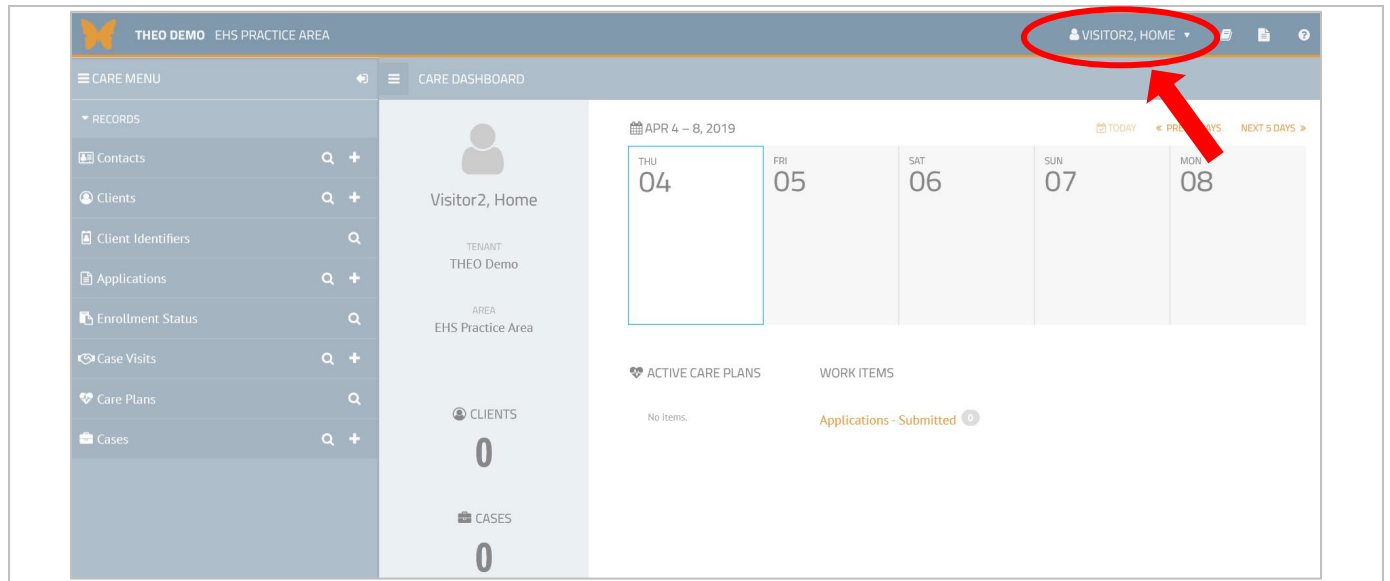

Figure 1: THEO dashboard

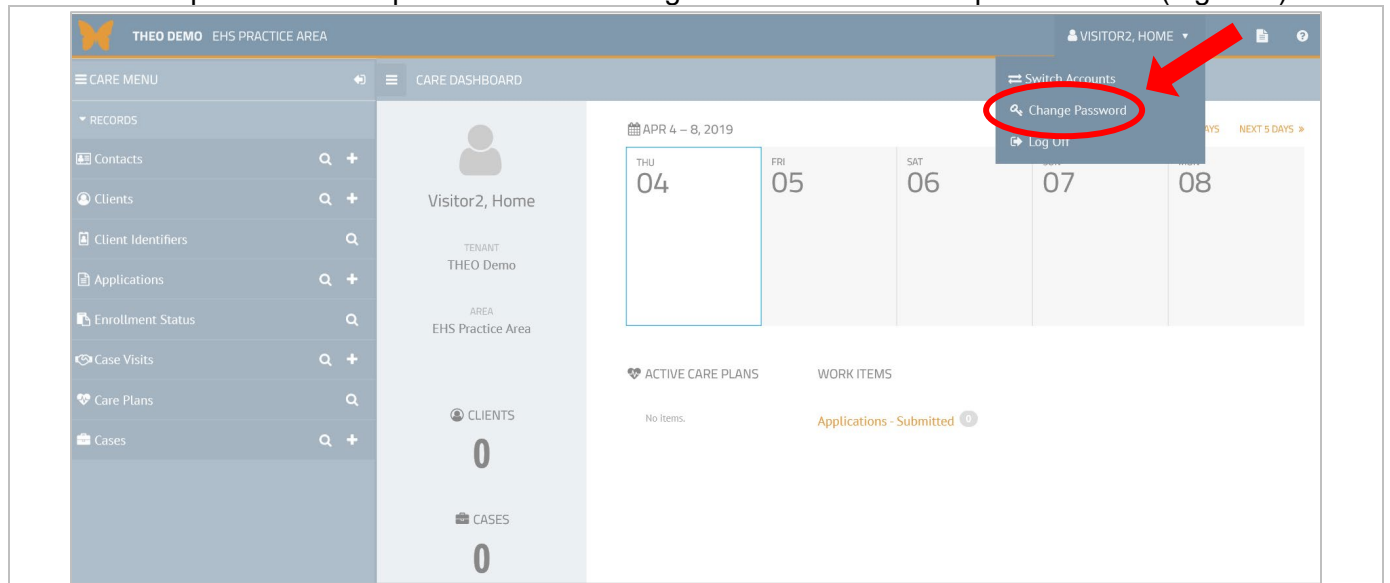- A drop-down menu opens. Click on "Change Password" in the drop-down menu (Figure 2).

Figure 2: Change Password

- The Change Password screen opens (Figure 3).
- Enter:
    - your current password
    - a new password (The password must include at least 9 total characters and at least one special character, for example, !, @, #, $, %, ^, or *.)
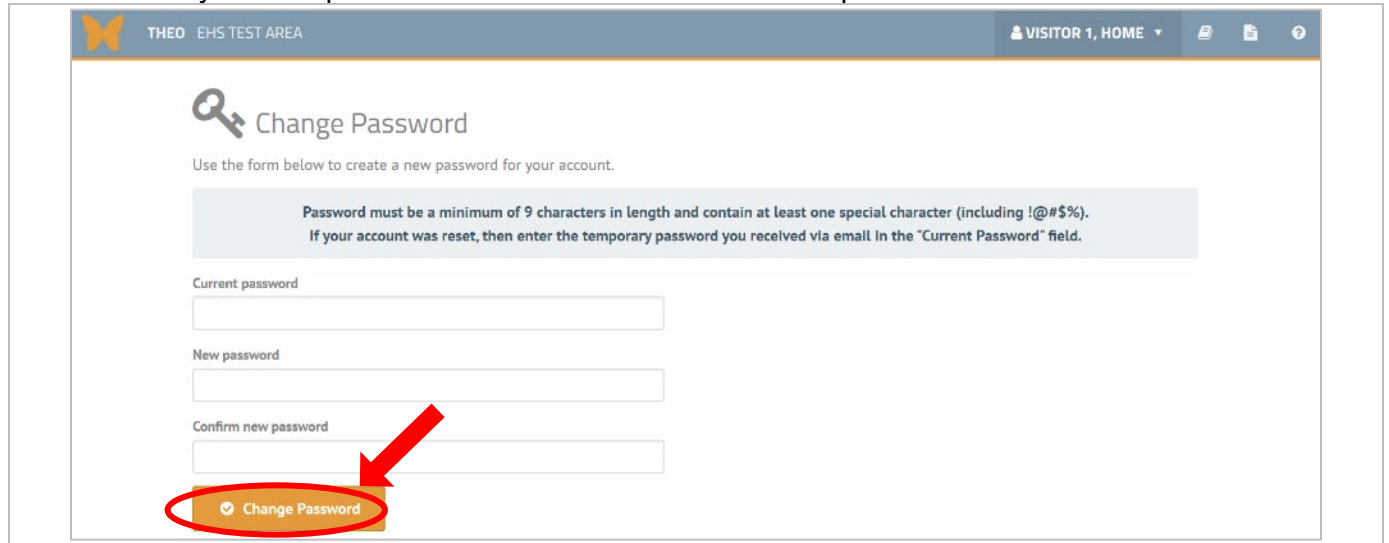- Enter your new password a second time in the Confirm password field.

Figure 3: Change Password screen

- The THEO dashboard opens with a message at the top saying the password has been changed successfully and will expire in 60 days (Figure 4).
- Some people who use THEO infrequently set reminders on their work calendar to help them remember to change their THEO password every 60 days to avoid lockouts.
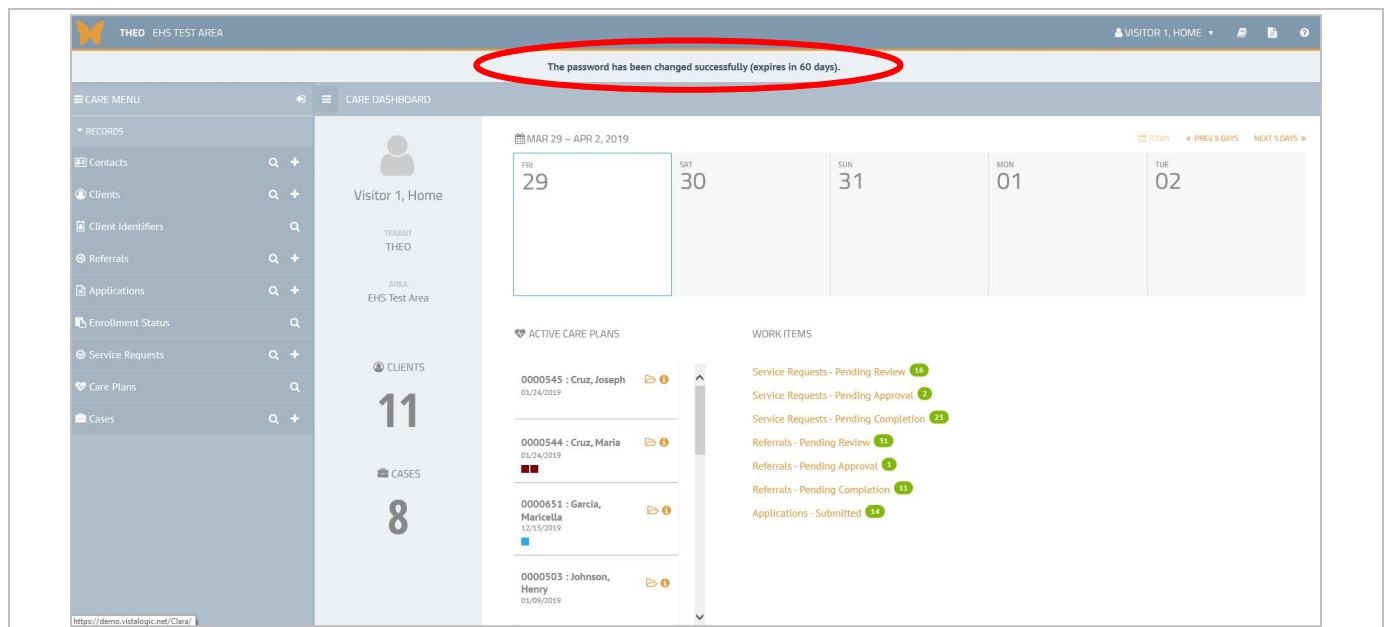

Figure 4: Dashboard with password message

1.5 Logout notice

THEO shows you a warning Logout Notice (Figure 1) when you are logged in to THEO, but you have not been working in it for 27 minutes.
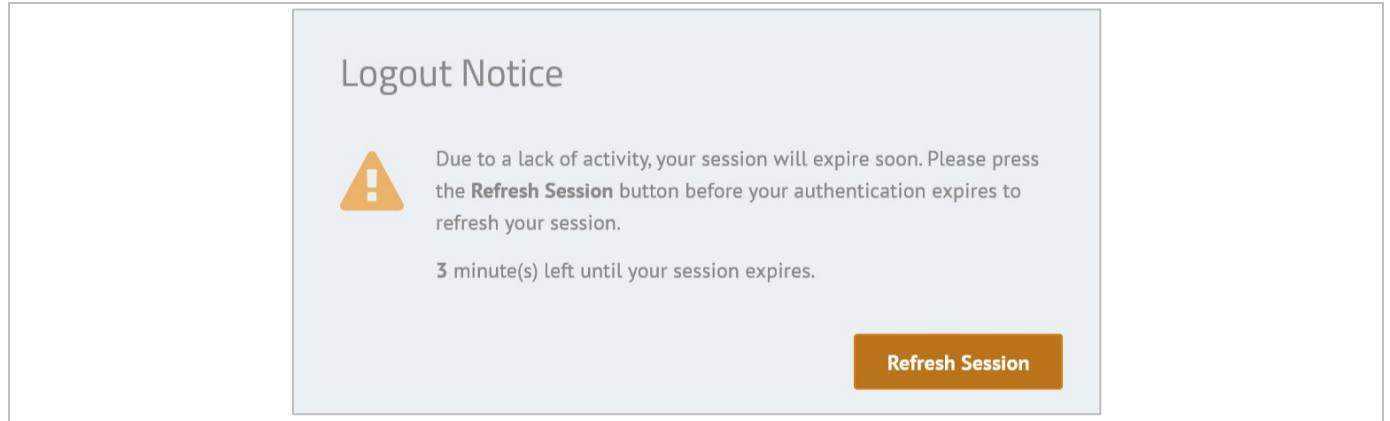

Figure 1: Logout Notice

Click on the orange Refresh Session button, in the lower right corner, to return to the screen where you were working most recently (Figure 2).
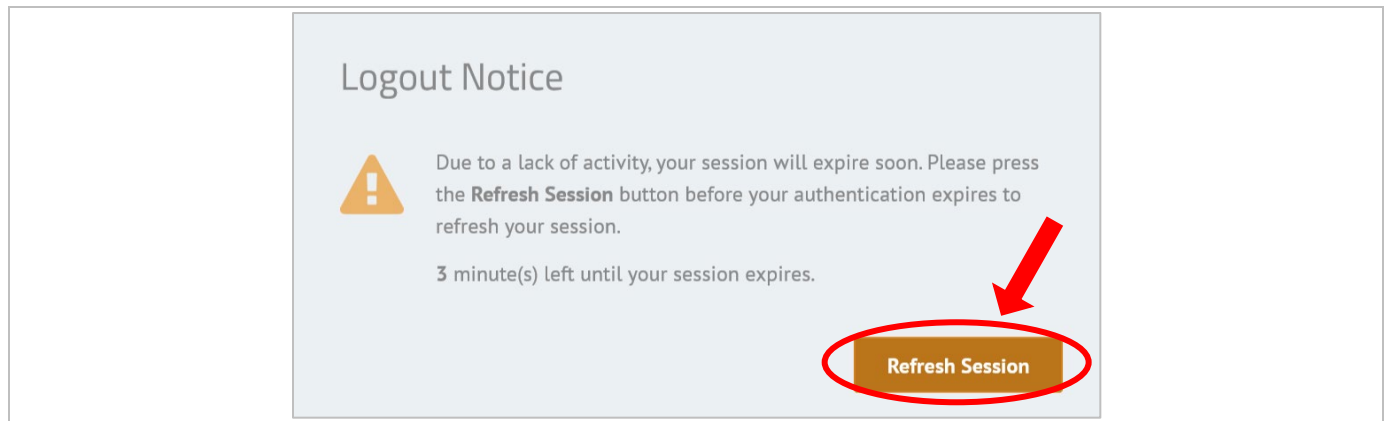

Figure 2: Logout Notice screen

If you do not click on the orange Refresh Session button, THEO will log you out of the system. The Logout Notice will close, and the login screen will appear. You will need to log in again if you wish to continue using the system.

1.6 Log off (Log out)

You can log off (log out) of THEO from anywhere in the system.

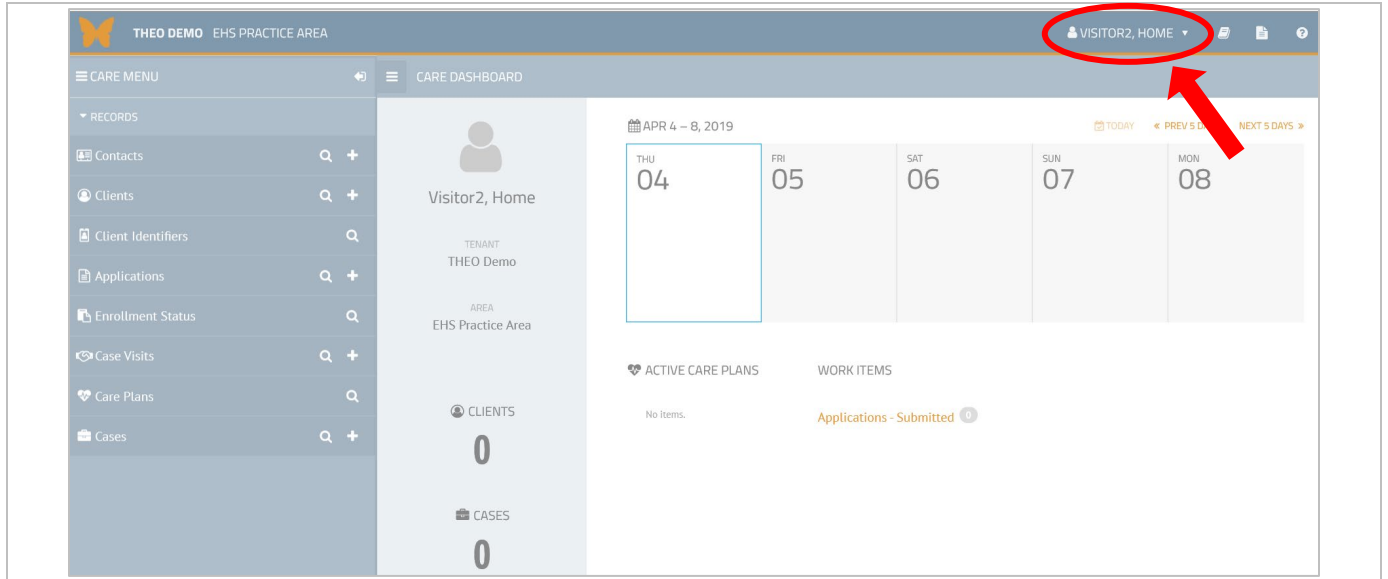- Mouse over your name in the top right area of the Title bar (Figure 1).

Figure 1: THEO Dashboard – Link to log off (log out)

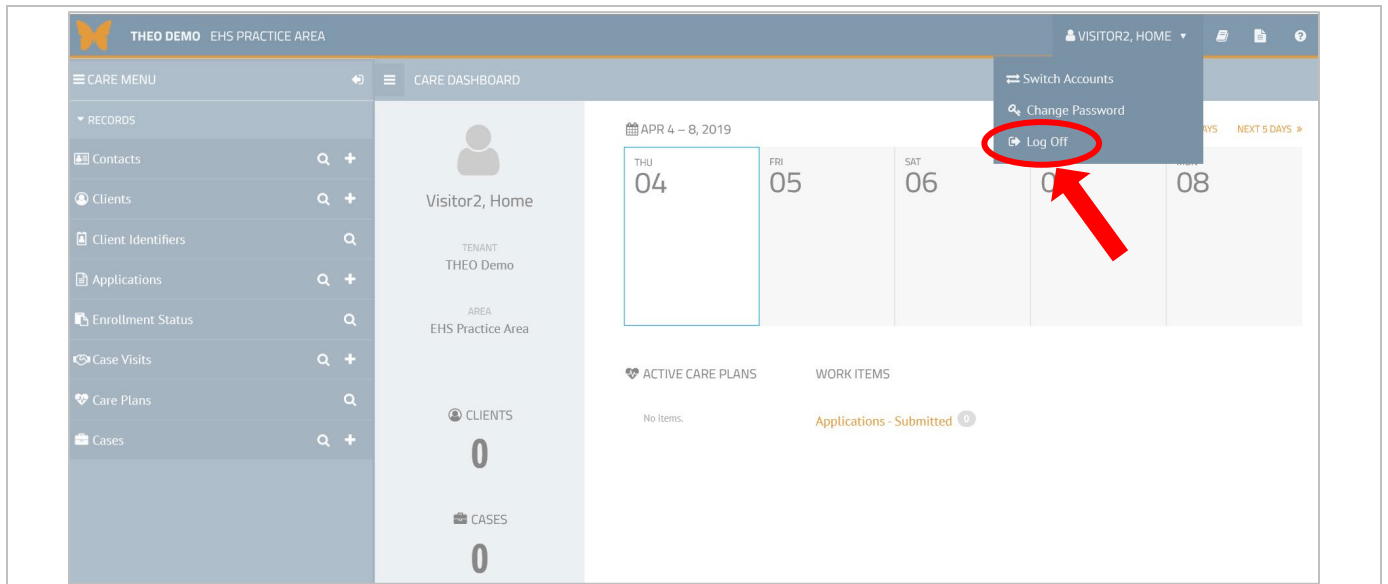- A drop-down menu opens. Click on "Log Off" (Figure 2).

Figure 2: Log off (log out) of THEO

- The THEO application closes, and the THEO Login screen opens (Figure 3).
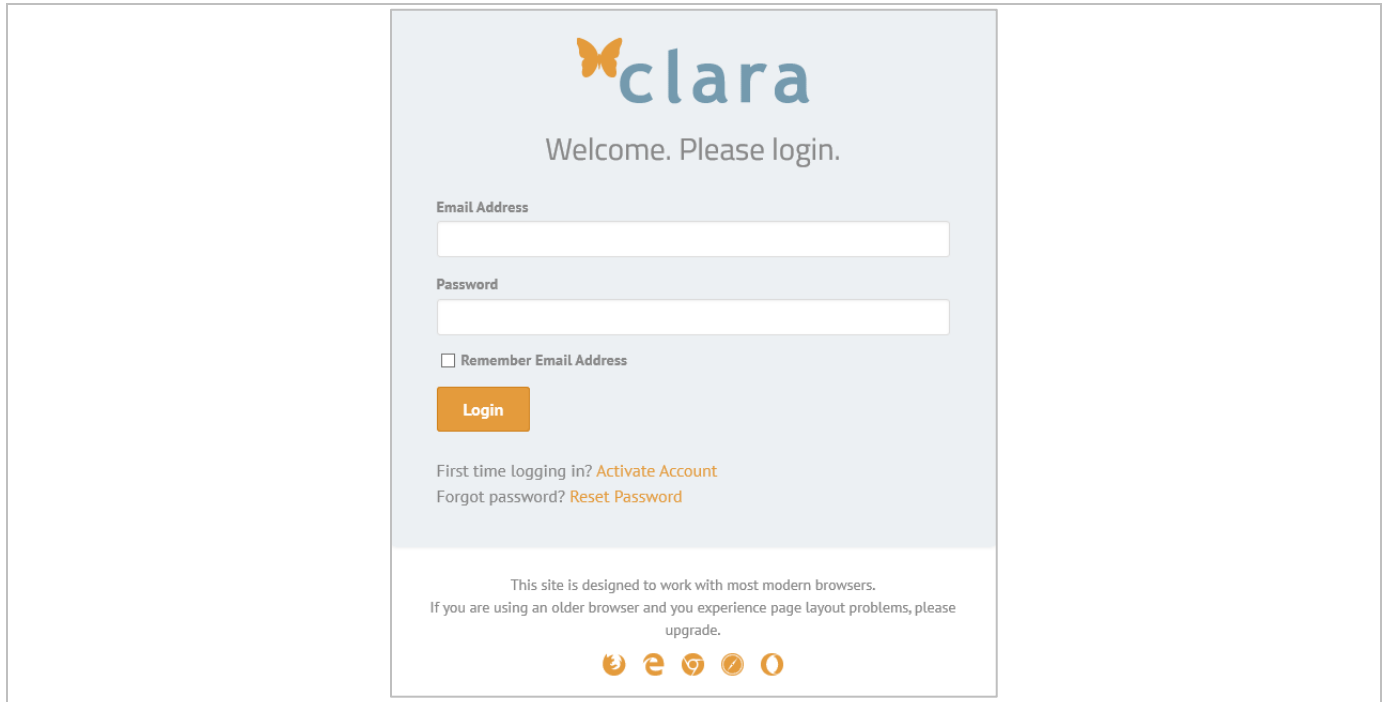- You are logged out of THEO.

Figure 3: THEO Login screen

1.7 Security best practices

1.7.1 Unique login and secure password

Everyone who uses THEO must read and sign a copy of the **End User Agreement – Individual User** form and agree to follow the terms of this agreement. These terms include updating your password every 60 days and keeping your password secret.

You will receive a unique login that is connected to your work e-mail address. THEO will require you to update the password for your login at least once every 60 days. The designated super user or manager of your local program will collect a signed user agreement from you and grant permission before you receive your THEO login.

1.7.2 Do not share your login

Never share your login with anyone (not even with your manager or THEO Application Support staff!). Always keep your password secret. Any actions performed in THEO under your login are linked to you personally. You are responsible for the actions done under your login.

1.7.3 Confidentiality and security requirements

THEO contains personally identifiable data about home visiting clients and the services they have received. Information collected about home visiting clients includes sensitive health data and private details about their lives. Federal and state laws, and your program's rules limit when you can share data from THEO without a signed release of information from the client or the client's guardian. Clients have a right to privacy and a reasonable expectation that their information will be protected. The trust of your clients depends on your protection of their information.

1.7.4 Electronic footprint and security auditing

Everything that you do in THEO, such as looking up a client, saving data, downloading data, or deleting data, leaves an electronic footprint in THEO. Whatever you do while you are logged in is captured in a security audit log, which records the history of the database. You are responsible for the actions recorded under your login.

2.0 THEO Dashboard and Care Menu

Section 2.0 provides an orientation to the THEO dashboard, Care Menu, and icons.

2.1 THEO Dashboard

Your THEO dashboard opens after you log in to THEO. What your dashboard looks like depends on whether you are a home visitor or have another type of job role, such as supervisor, super user, or data specialist. The arrangement of items on your screen also may vary depending on your screen settings and the size of the monitor you are using.

Figure 1 shows a home visitor's dashboard on a full-sized monitor. Note the list of clients currently assigned to Home Visitor (the "Active Care Plans"). Number of total clients and families (cases) display to the left of the Active Care Plans.
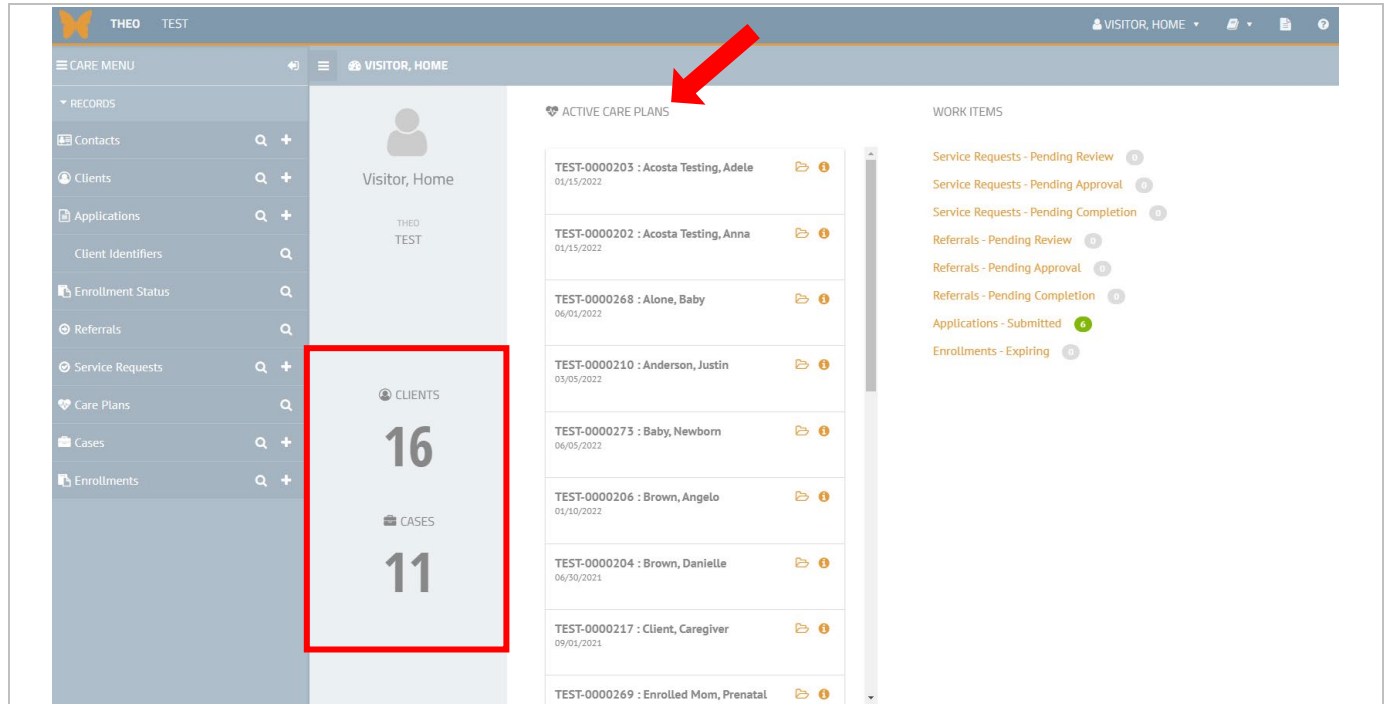
Figure 1: Dashboard for a home visitor – Full-sized monitor displaying Active Care Plans

Figure 2 shows a dashboard for a user who is a supervisor, super user, or data entry specialist. Click on the orange icon to the right of "RECORDS" on your screen. This will open a list of nurse case managers at your agency, who are assigned Babies First! and/or CaCoon clients currently.
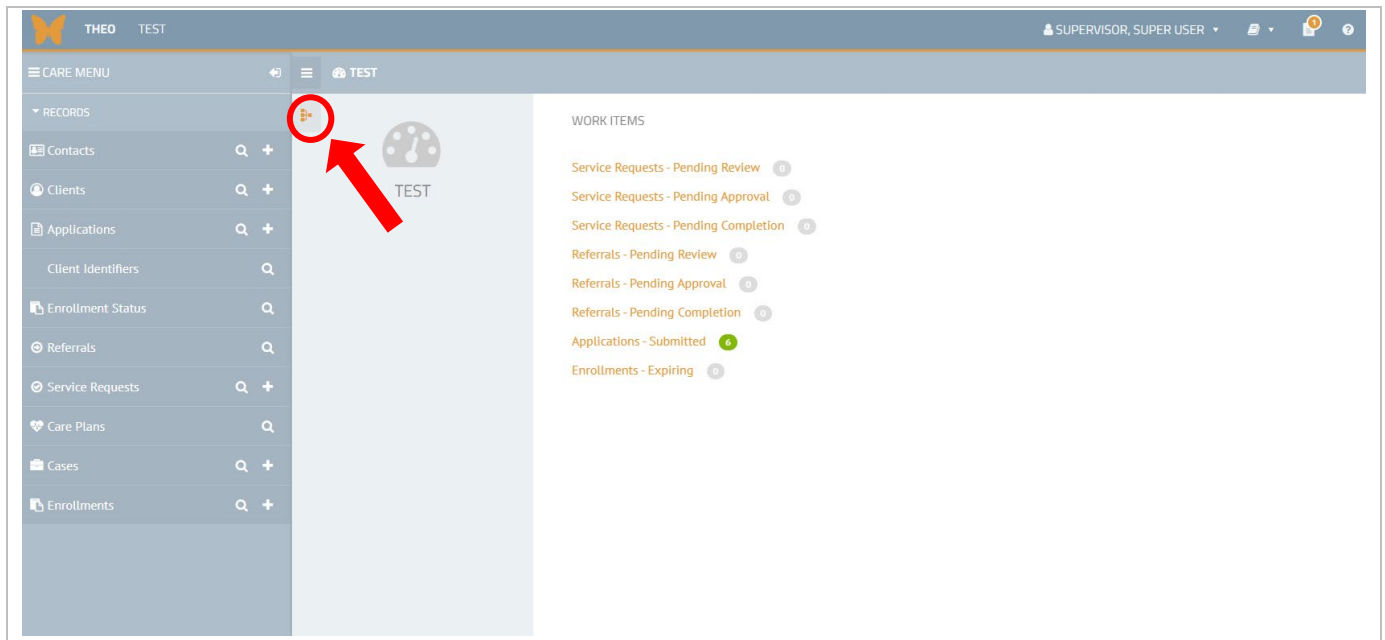
Figure 2: Dashboard for a supervisor, super user, or data specialist - Full-sized monitor

A new panel opens on your screen with links to the dashboard for each case manager at your agency. Counts of assigned clients and cases (i.e., families) display to the right of each home visitor's name (Figure 3).
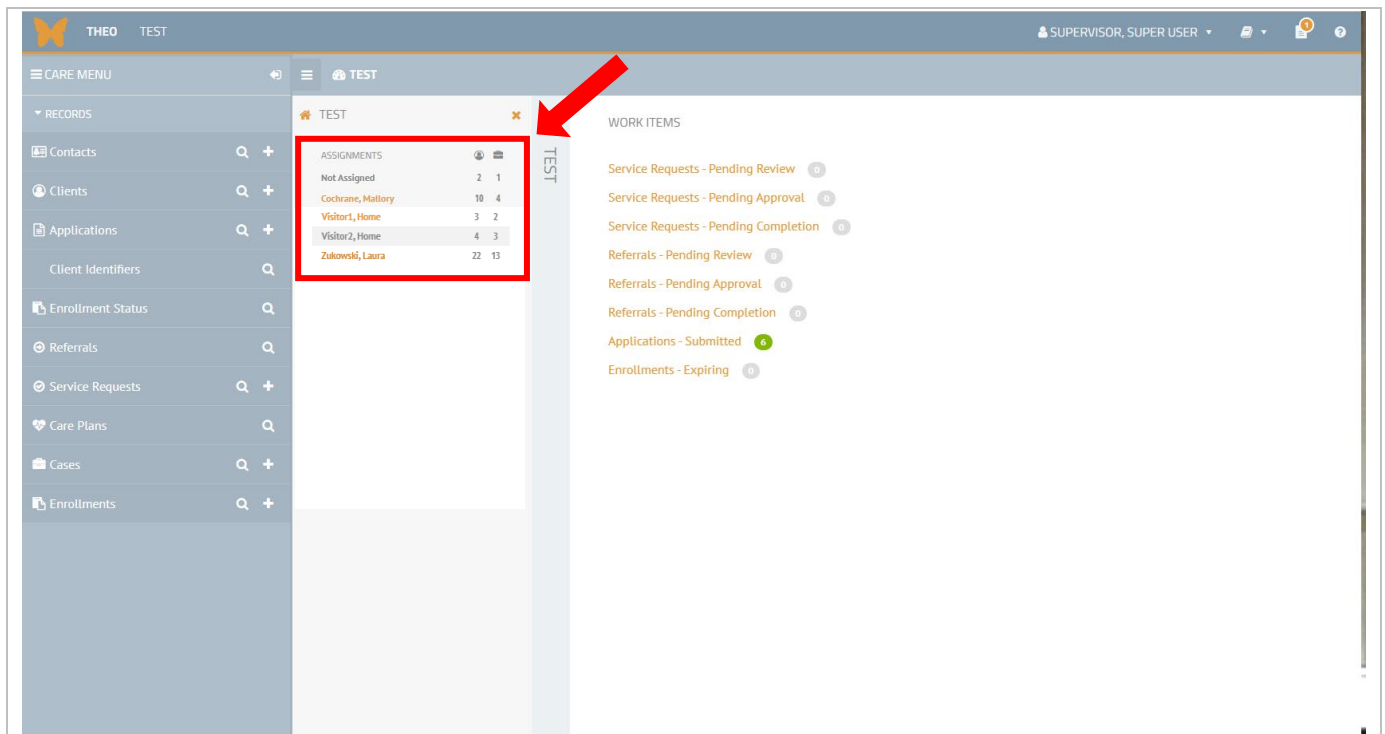
Figure 3: Links to the dashboard for each home visitor at your agency - Full-sized monitor

Clicking on a case manager's name will make a list of their current assigned clients display, along with links to each client's dashboard, which THEO calls a Care Plan (Figure 4).
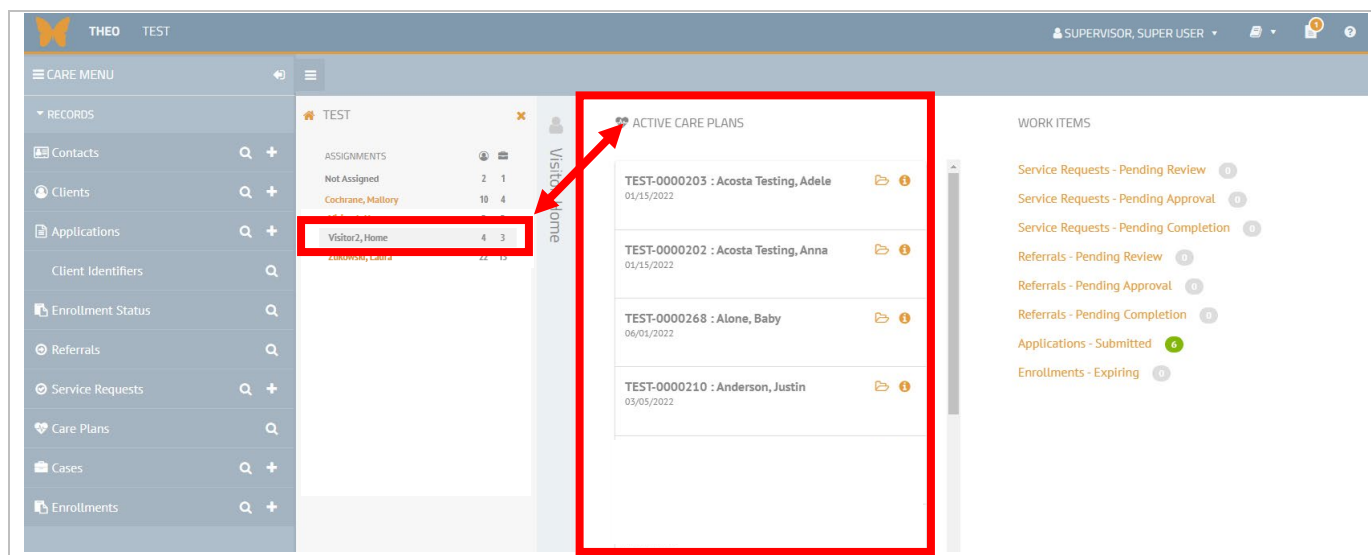
Figure 3: Home visitor's assigned caseload - Full-sized monitor

2.2 Icons and moving around in THEO

Icons are the little symbols or pictures that appear throughout THEO. Clicking on an icon opens another screen or window in THEO. The icons allow you to move around in THEO more easily.
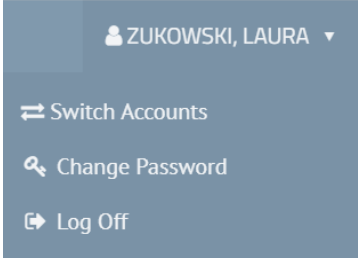Holding your cursor over an icon (or "mousing over" an icon) will change your cursor into a pointing

hand , and the name of the icon will appear near it. As icons appear in each section of this manual, we will describe them.

On the THEO Title Bar, the parts and icons that appear, from left to right, are described in **Table B** (below)**.**

Table B: THEO Title Bar Parts and Icons

Icon	Name	Description
	Orange Butterfly	The orange Butterfly appears on every screen in THEO and will return you to the main dashboard you see when you log in to THEO.
MULTNOMAH COUNTY HEALTH DEPARTMENT - BABIES FIRST!	Area within THEO	Shows the program and location where you work. Area refers to a home visiting program at a specific agency location.

Icon	Name	Description
ZUKOWSKI, LAURA ▾ ⇄ Switch Accounts ⚷ Change Password ⮌ Log Off	User Account	Displays the name of the user who is logged in to THEO. Mouse over your name to open this menu, which has three options: 1. Switch Accounts allows you to access data in another Area in THEO. Note: Babies First! and CaCoon data are collected in separate Areas, and you can move back and forth between the Areas without having to log in again. 2. Change Password takes you to the screen where you can reset your password. 3. Log Off logs you out of THEO and returns you to the login screen.
	Resource Library	Links you to commonly used documents and websites. You can download, save, and print documents from the Resource Library. All surveys are available in the Resource Library.
	Files	Takes you to a directory of documents that you have uploaded or downloaded in THEO. You can upload PDFs of signed consent forms or release-of-information forms, completed screenings, etc. Files that you download from THEO also appear on the Files page.
	Help & Support	Displays email address for THEO Application Support (**theo.support@dhsoha.state.or.us**). Please request a secure email if you need to send confidential client information to the support team.

Icons and links on the THEO Navigation Bar vary depending on the screen where you are working in THEO, but an important icon that always appears on the Navigation Bar is the Toggle Main

Menu icon (   ) and the Close Care Menu icon (   ), which open and close the Care Menu from any screen.

Figure 1 shows the Toggle Main Menu icon with the Care Menu closed. Figure 2 shows the Toggle Main Menu with the Care Menu open. Try the following steps to practice opening and closing the Care Menu.

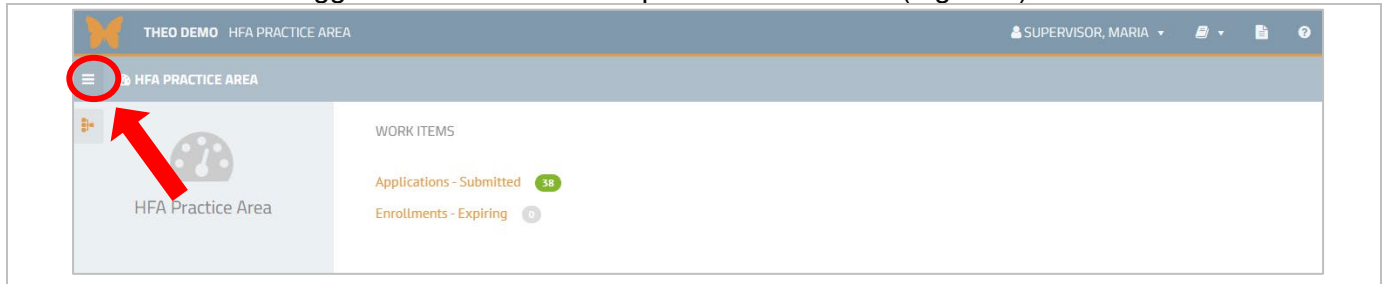- Click on the Toggle Main Menu icon to open the Care Menu (Figure 1).

Figure 1: Toggle Main Menu icon (Care Menu closed)

- When the Care Menu is open (Figure 2), either click on the Toggle Main Menu icon

( ) or click on the Close Care Menu icon ( ) to close the Care Menu.
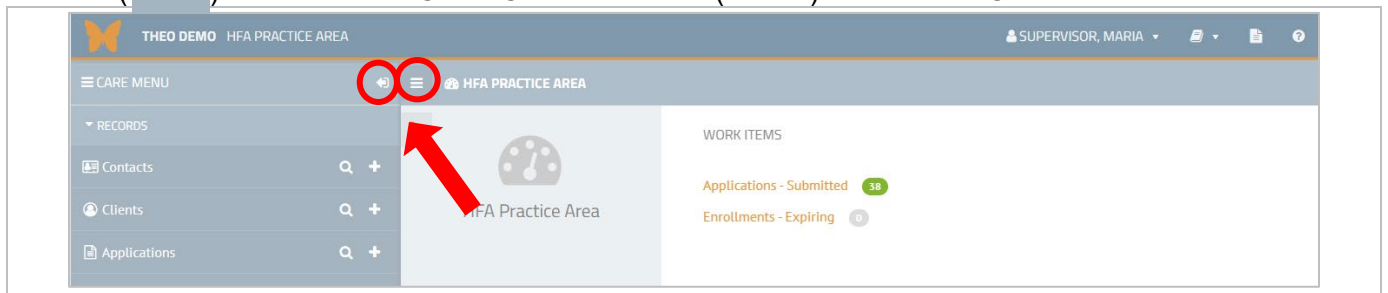

Figure 2: Toggle Main Menu icon and the Close Care Menu icon

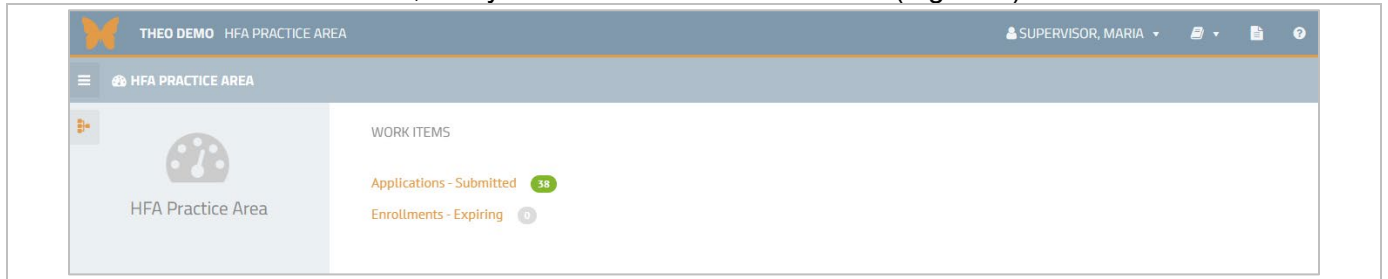- The Care Menu closes, and your dashboard fills the screen (Figure 3).

Figure 3: Dashboard with closed Care Menu

2.3 Care Menu

The Care Menu, on the left side of your screen, includes links to other screens in THEO (Figure 1): Contacts; Clients; Applications; Client Identifiers; Enrollment Status; Care Plans; Cases; Enrollments. When you click on any item or icon listed on the Care Menu, a screen will open where you can search for (and sometimes add) new records of that type.
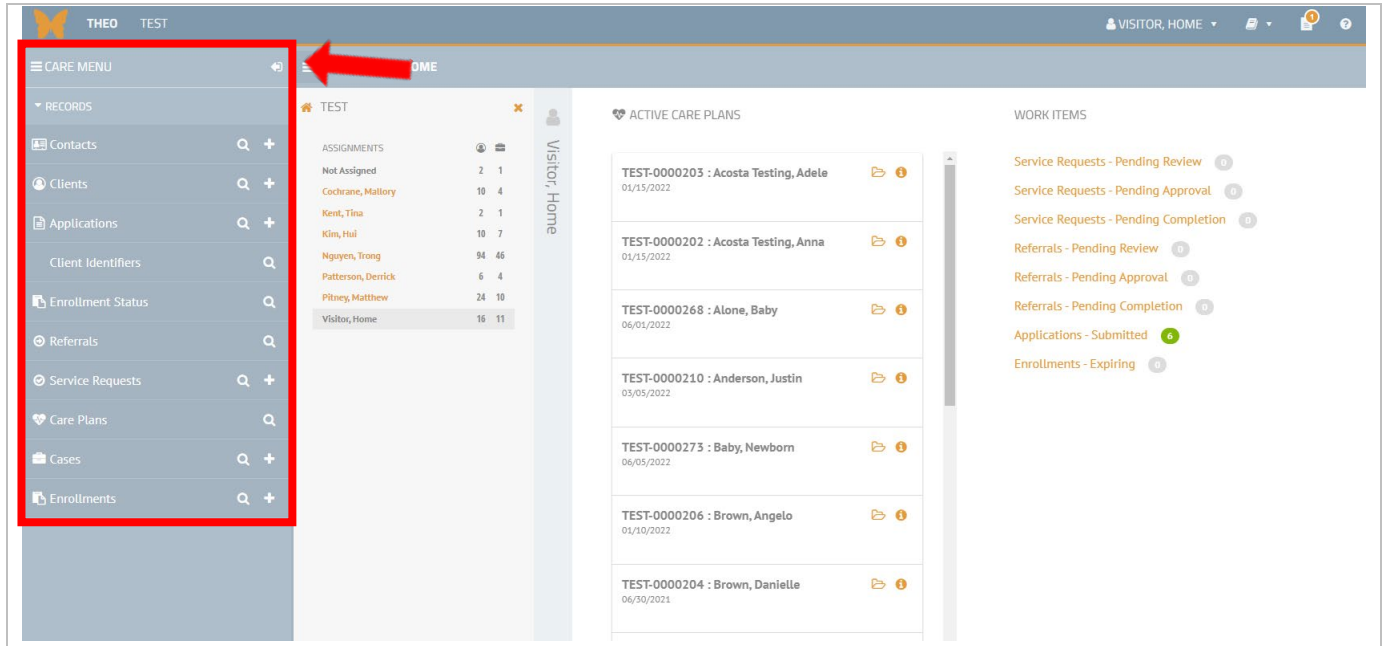
Figure 1: THEO dashboard – Care Menu

The icons that appear in the Care Menu, from top to bottom, are described in **Table C** below.

Table C: Care Menu Icons

Icon	Name	Description
	Find (Magnifying glass)	Takes you to a search screen where you can find records.
	New (Add New)	Adds a new record.
	Contacts	Takes you to a list of all Contacts, where you can search, filter, sort, and download the records.
	Clients	Takes you to a list of all Clients, where you can search, filter, sort, and download the records.

Icon	Name	Description
	Client Identifiers	Takes you to the Search Client Identifiers screen, where you can add identifiers to a client's record and search using these alternative identifiers. The purpose of this screen is to allow more detailed searching of client records. Examples of other identifiers include driver's license number, medical record number, and identifiers from other databases used by local agencies.
	Applications	Takes you to a list of all Applications, where you can search and filter the records.
	Enrollment Status	Takes you to a list of all clients in THEO with summary information about their enrollments and applications. The Enrollment Status screen lists the client ID and name, program ID, area, current enrollment status, start and end dates of enrollments, screening result, screening ID, screening date, and application ID. Note: This screen allows you to view information about enrollments and applications by all programs and agencies around the state. This allows you to determine whether someone is enrolled currently in another home visiting program to avoid duplication of services.
	Care Plans	Takes you to a search screen, where you can find all Care Plans for clients enrolled at your agency.
	Cases	Takes you to a search screen, where you can find all Cases at your agency. Note: A "case" refers to all people in a household or family who are enrolled together in the same home visiting program.
	Enrollments	Takes you to a list of all Enrollments at your agency, including current enrollments and past enrollments. You can search and filter the records.

3.0 Enrolling Clients with THEO's Application

THEO enrolls clients using the Application process, which guides you through a series of steps. At the end of the Application process, THEO creates a Case for each family, and a Care Plan for each client in the Case. All members of a family or household who are enrolled together in one program are called a "Case" in THEO.

Below are instructions for different types of client enrollments.

3.1 Babies First! or CaCoon infant, child, or youth enrolls alone: Add New Application

Sometimes an infant, child, or youth may enroll in Babies First! or CaCoon alone. No one else in the family is enrolled in the program.

1. Add New Application
   - From your THEO dashboard, click on the New (+) icon to the right of Applications on the Care Menu (Figure 1).
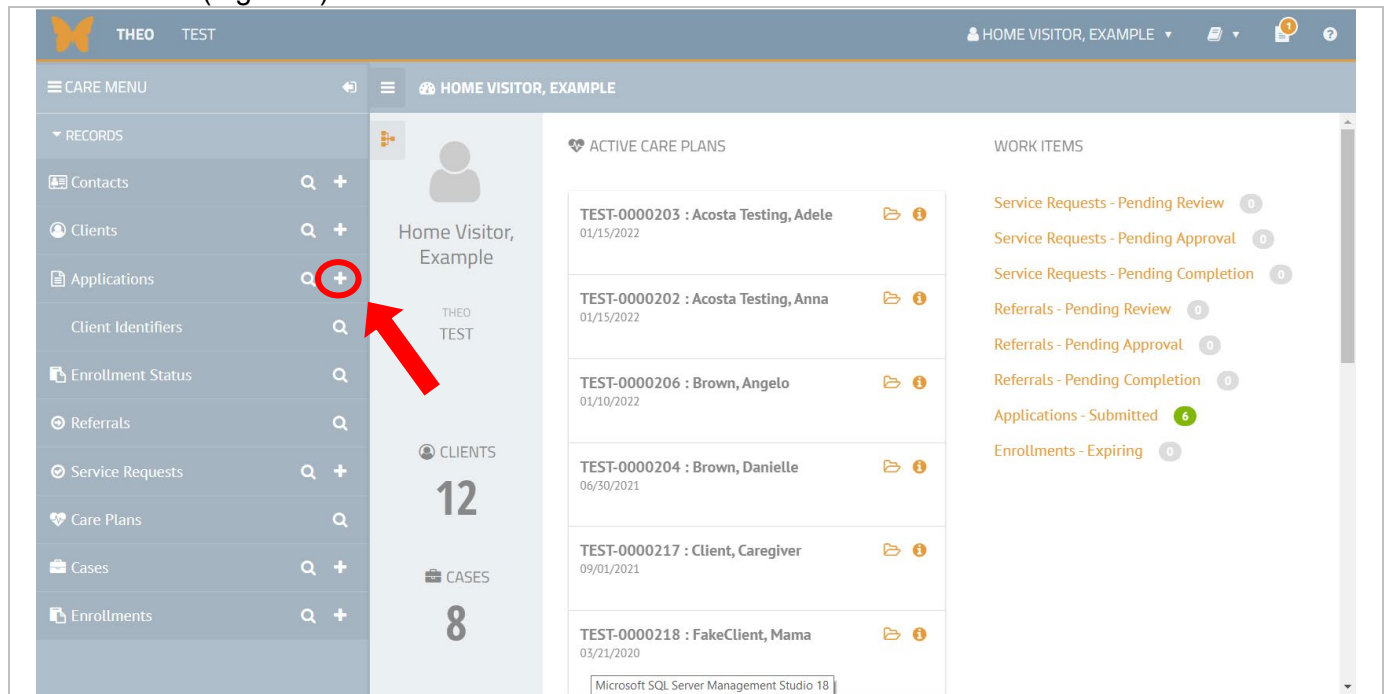
Figure 1: THEO Dashboard – Add New Application

2. Add New Client Information screen opens (Figure 2).
- Enter client's data in all required fields, which are marked with an orange left border
- Also enter Local Client ID and Primary Spoken Language.
- Click on the orange Save & Continue button.

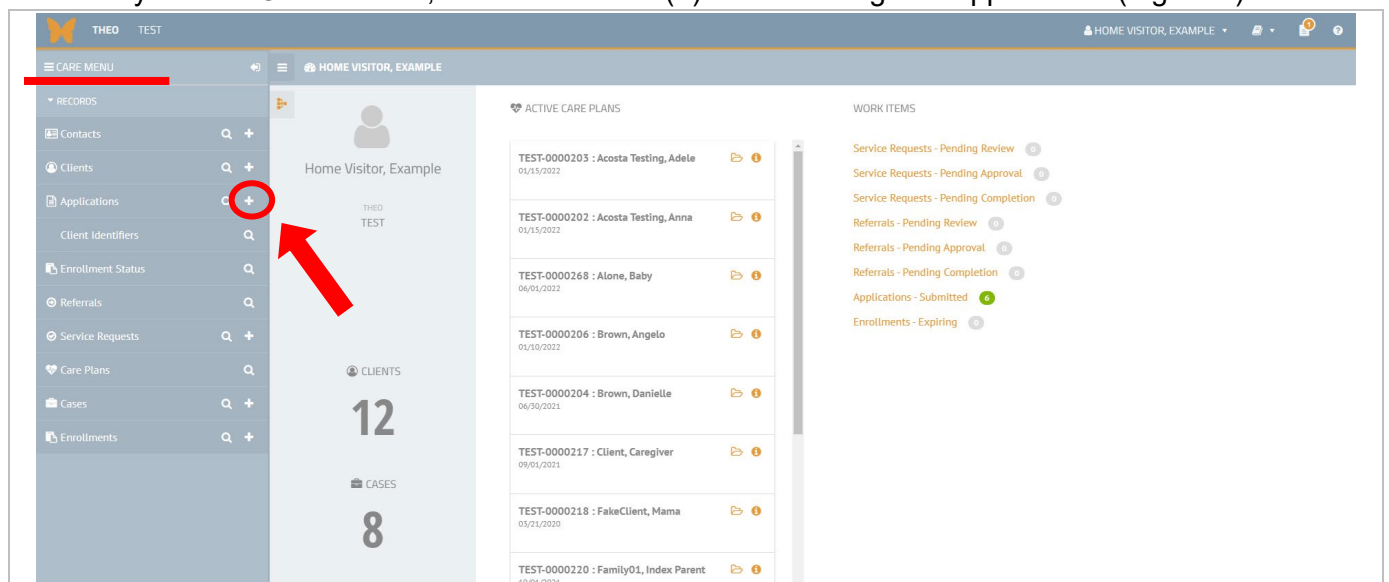Figure 2: Add New Client Information screen

Data Entry Tips

- Fields marked with orange on the left border are required, which means you must enter data in these fields before THEO will allow you to save the record.

- A required field that is left blank (empty) will cause an error message when you try to save. Enter data in the required field and then save. The error message disappears, and the entry is saved.

- If you do not know the client's address, phone, and/or email, click on the checkbox to the left of the item to remove the checkmark in the checkbox (Figure 3). Removing the checkmark turns off the field and allows you to leave the field blank when you save your data entry.

3. Turn off contact information fields if preferred (Figure 3).
   - (Optional step) Uncheck Addresses, Phone, and Email to make these fields not required.
   - Click on the orange Save & Continue button
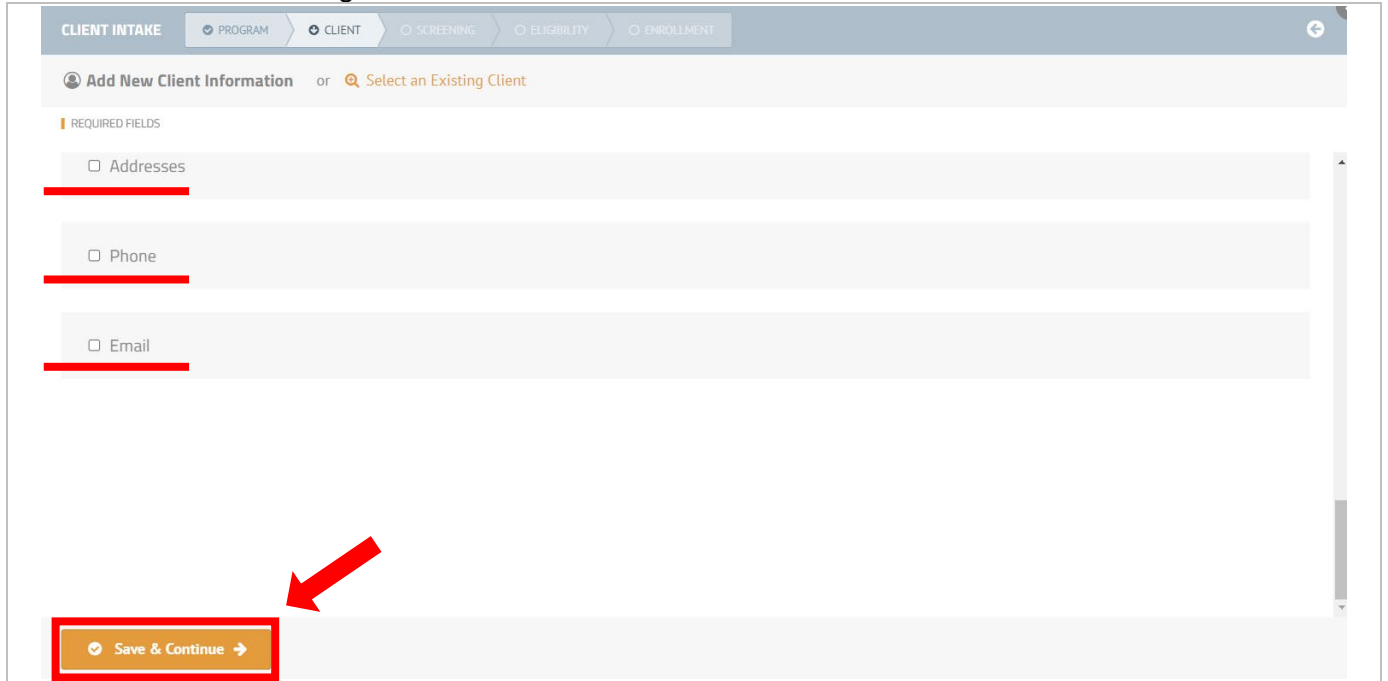
Figure 3: Turn off data fields in the Addresses, Phone, and Email sections (optional)

4. Client summary opens and shows client on application (Figure 4).
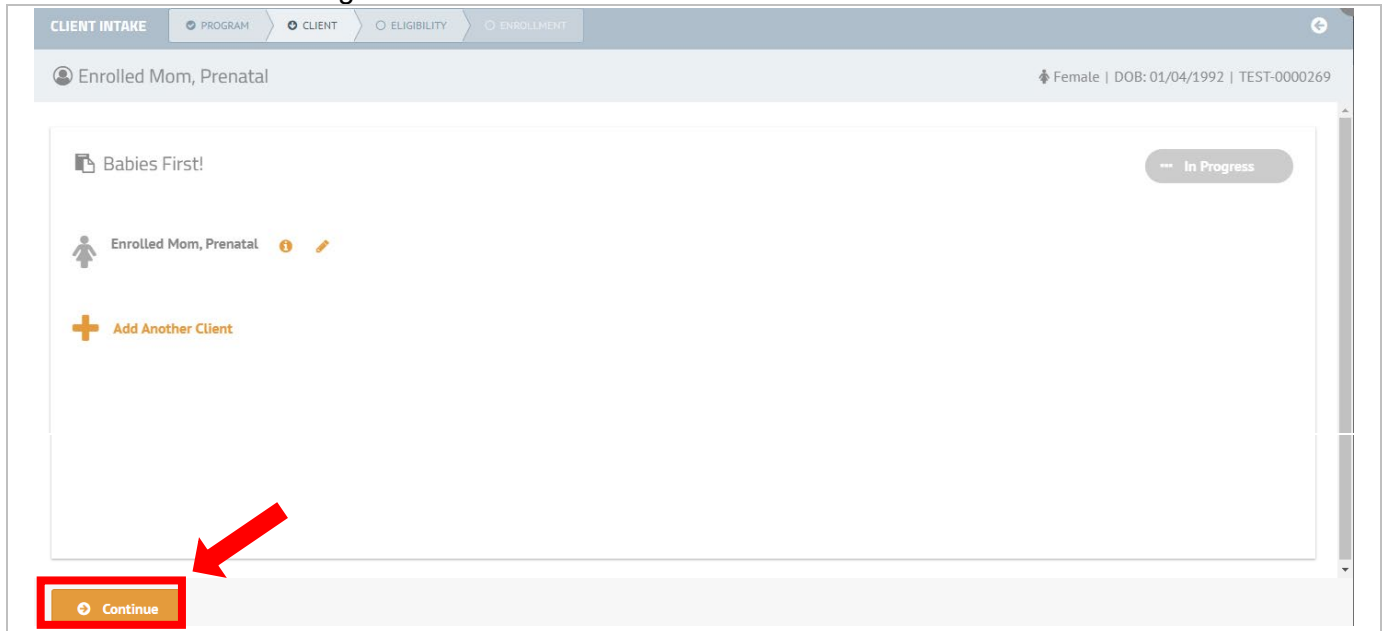   - Click on the orange Continue button.
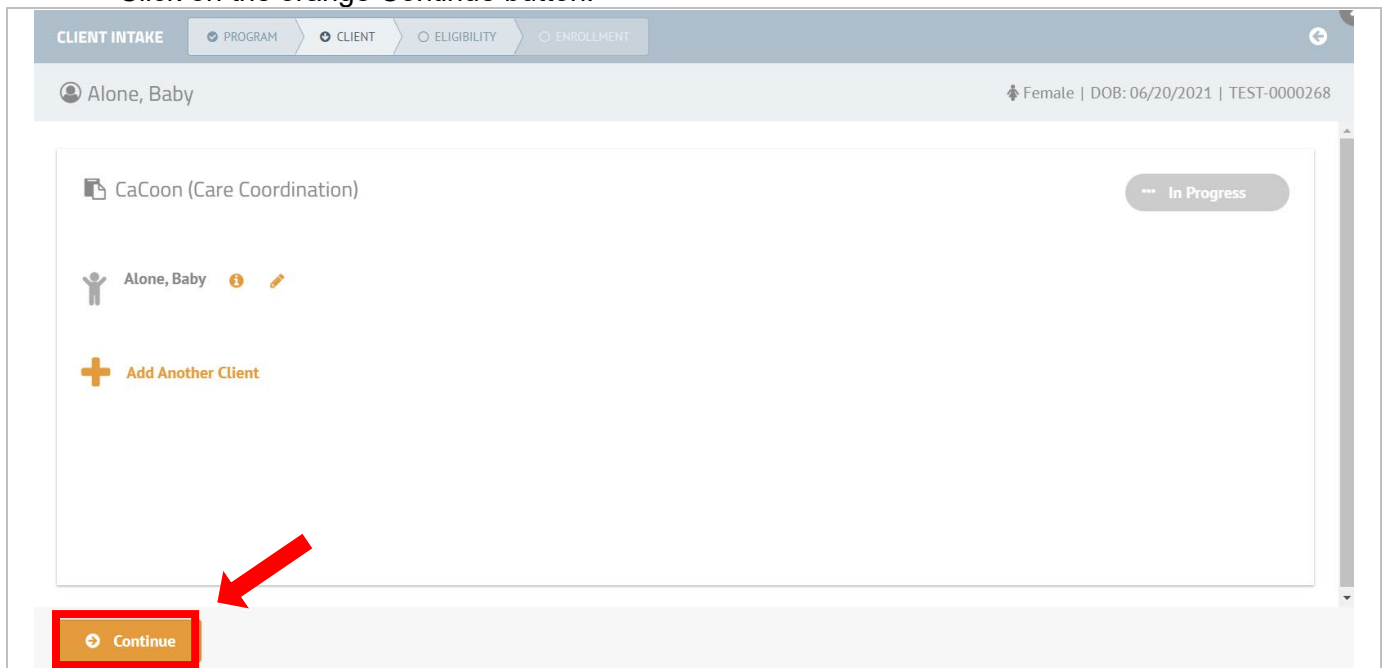
Figure 4: Client summary

5. Eligibility screen opens and lists client who is enrolling (Figure 5).
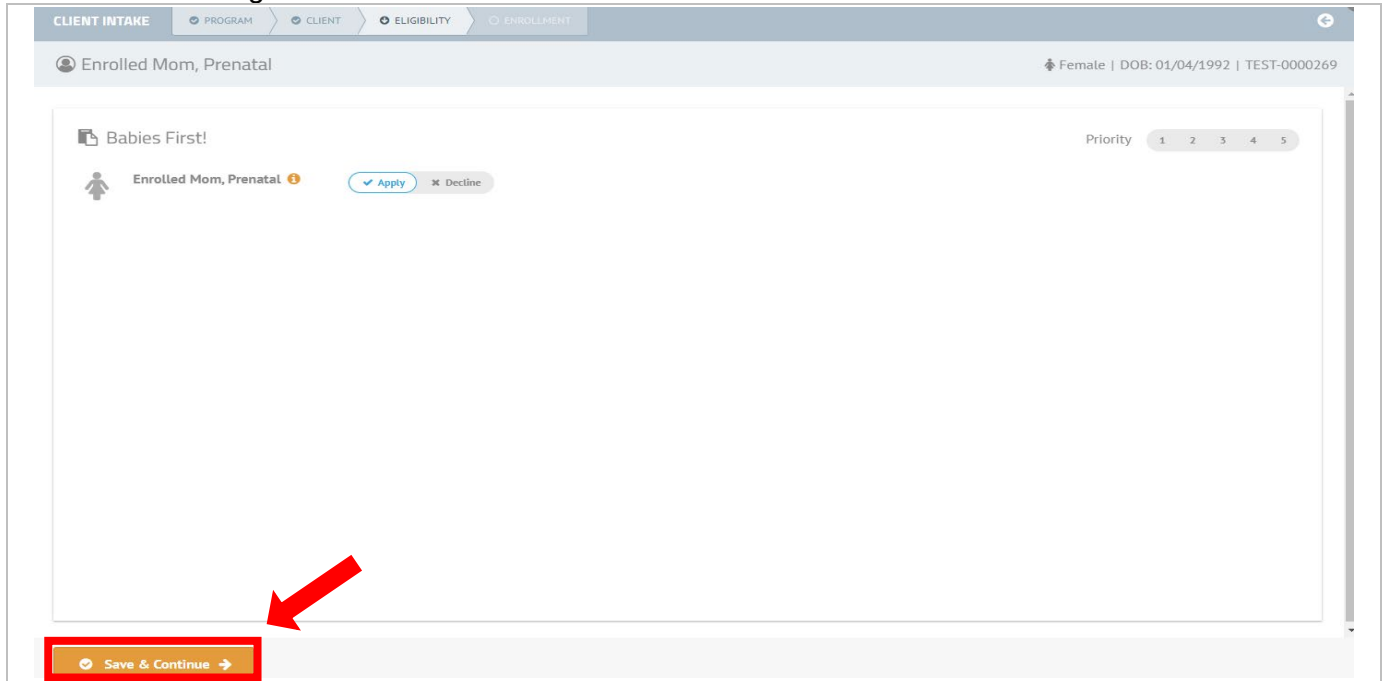   - Click on the orange Save & Continue button.
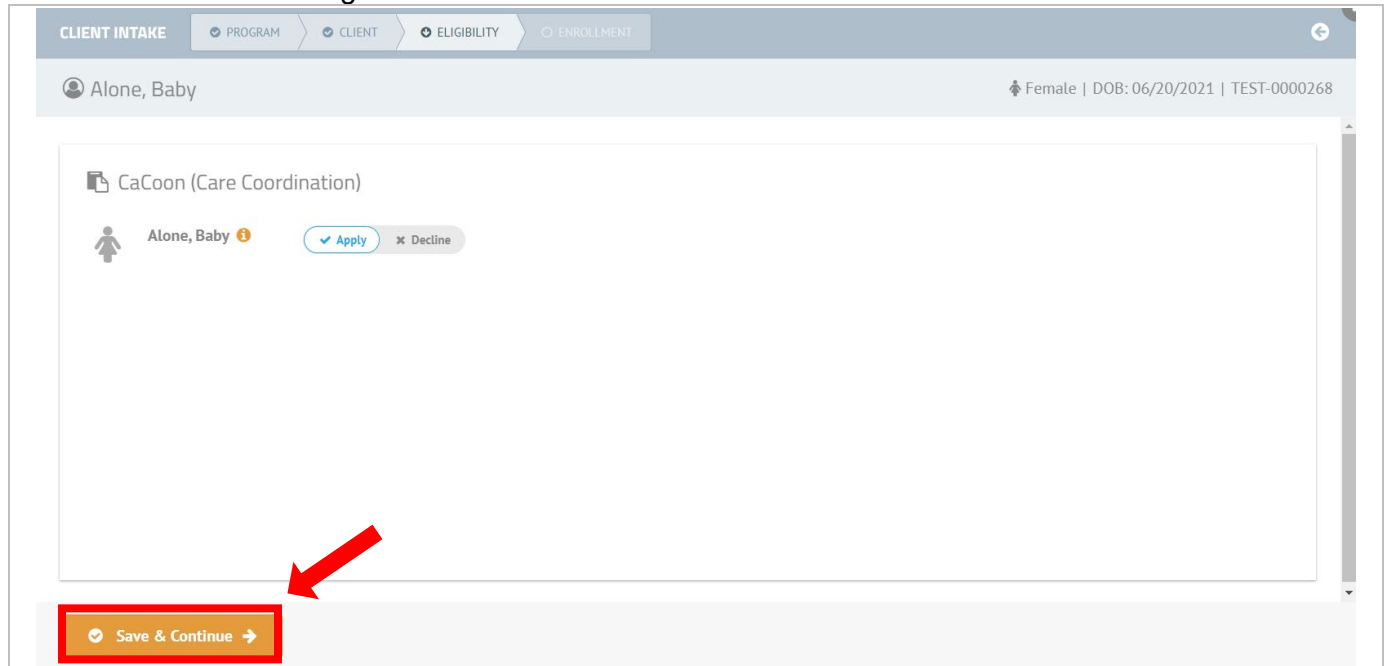
Figure 5: Eligibility screen

6. Enrollment screen opens (Figure 6).
   - Enter Enrollment Start Date. Select the correct nurse case manager in the Assigned To field.
   - Click on green Approve & Enroll button.
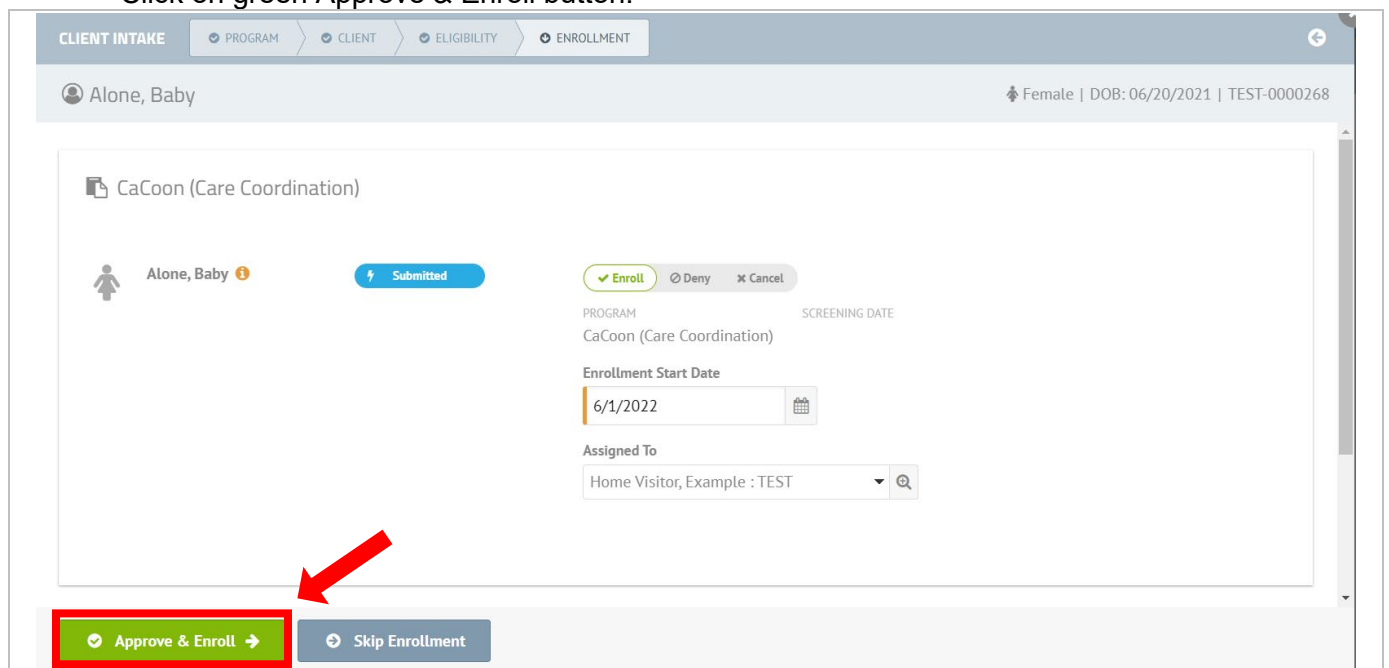
Figure 6: Enrollment Start Date and Assigned To fields

7. Completed application displays (Figure 7).
- Client has an Open Care Plan button and a green Enrolled badge to the right of their name.
- Click on the client's Open Care Plan button. Go to Section 3.5.1, page **45**, to enter the client's 3 surveys and complete the final steps of enrollment.
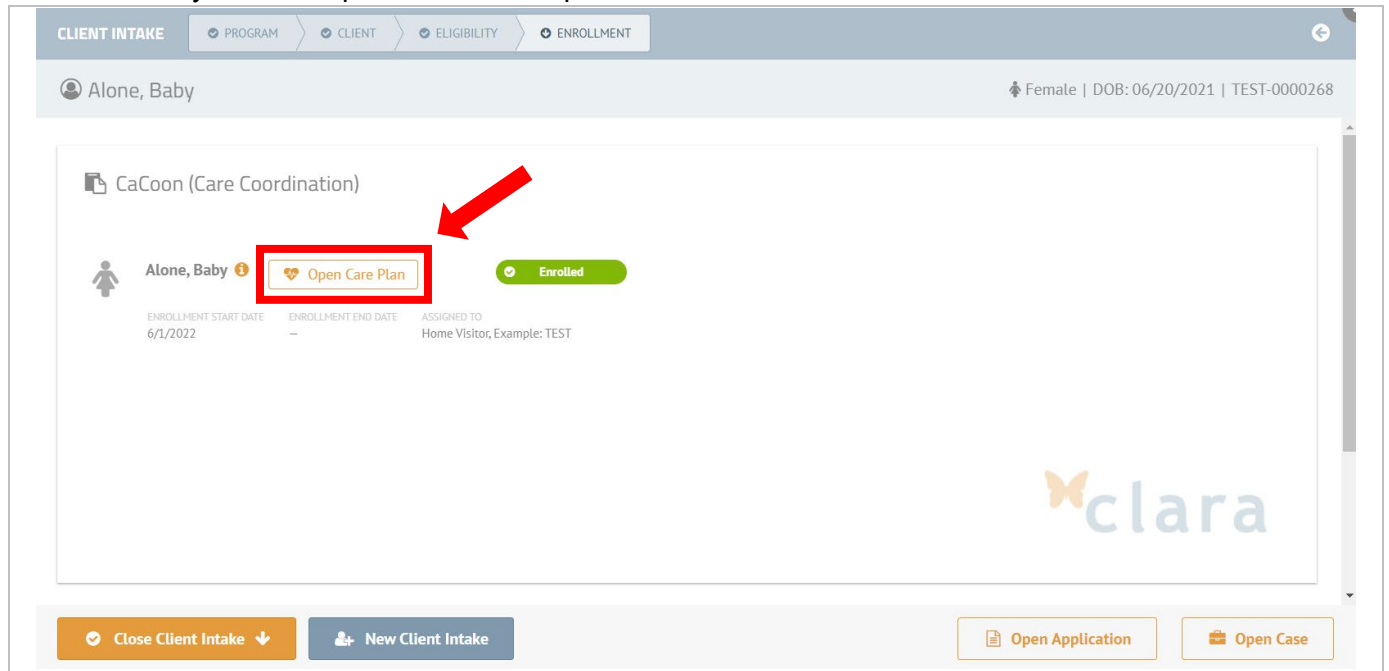
Figure 7: Completed application

3.2   Prenatal Babies First! caregiver enrolls alone: Add New Application

Some families enter the program before the child is born. In these families, a prenatal Babies First! caregiver enrolls alone. The infant enrolls after birth. Note: CaCoon does not enroll prenatal caregivers.

1. From your THEO dashboard, click on the New (+) icon to the right of Applications (Figure 1).

Figure 1: Add New Application

2. Add New Client Information screen opens (Figure 2)
   - Enter caregiver's data in all required fields, which are marked with an orange left border.
   - Also enter Local Client ID and Primary Spoken Language.
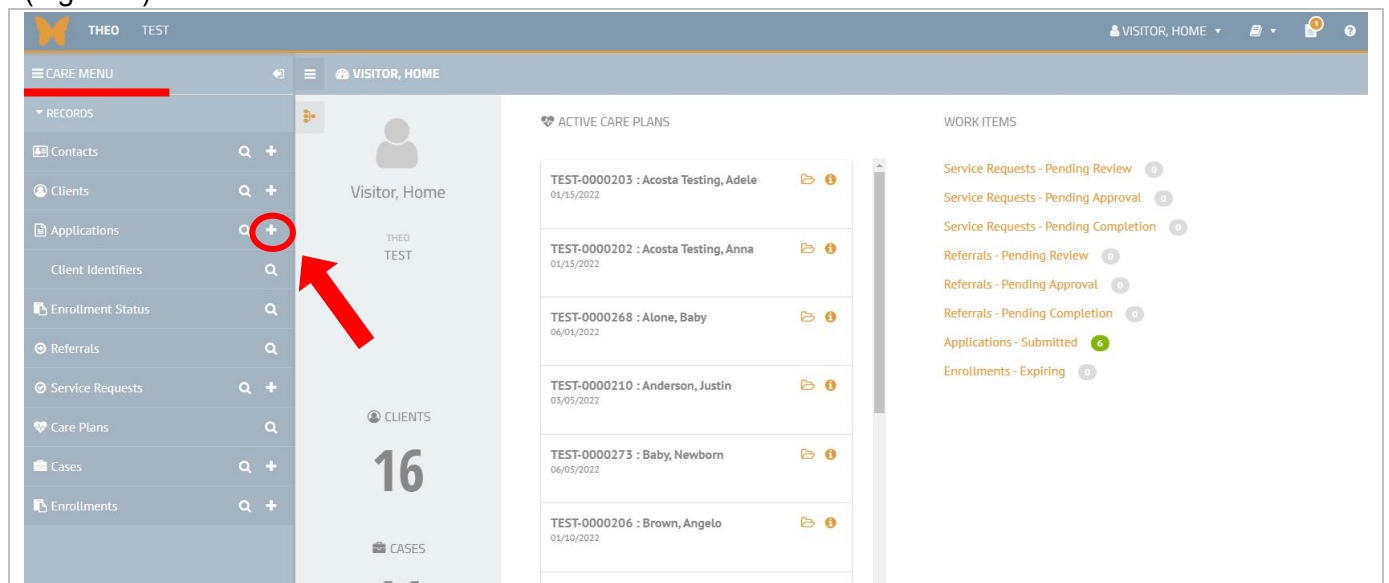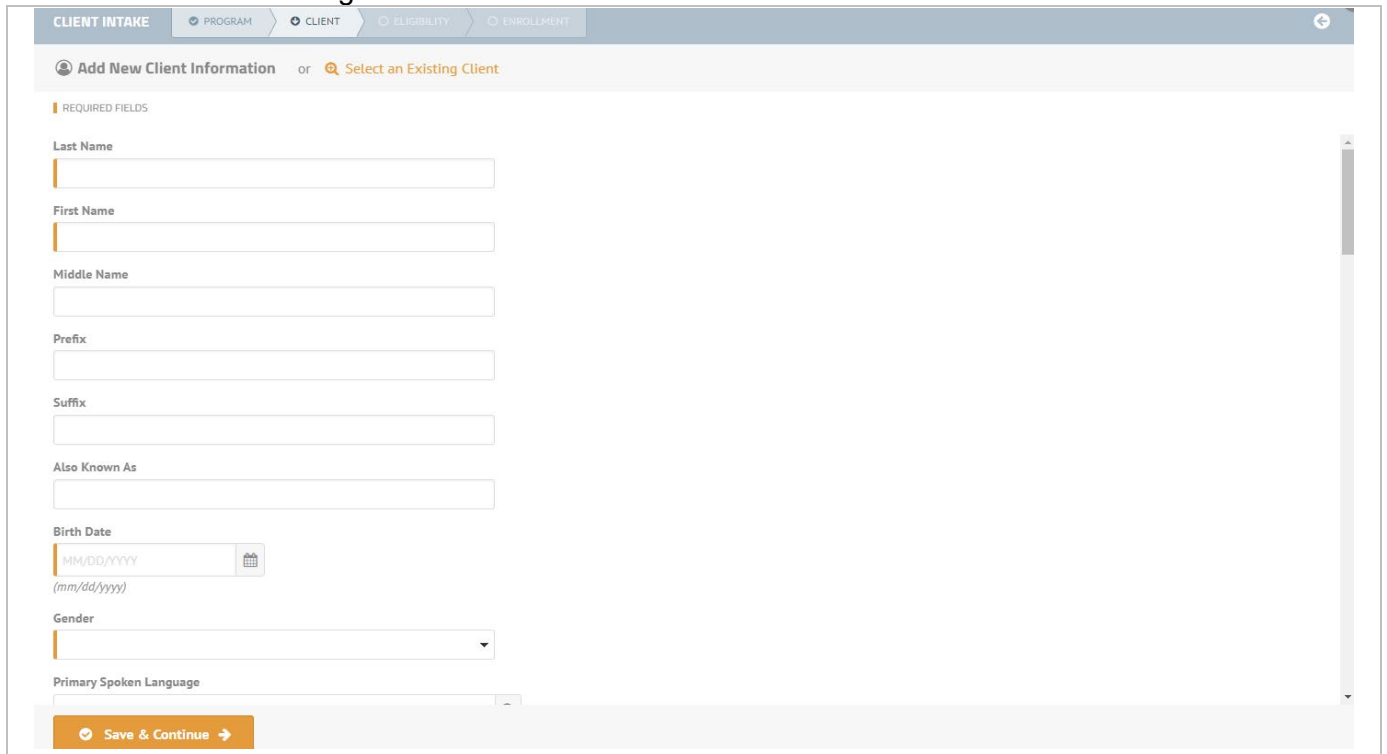   - Click on the orange Save & Continue button.

Figure 2: Add New Client Information

3. Turn off contact information fields if preferred (Figure 3)
   - (Optional step) Uncheck Addresses, Phone, and Email to make these fields not required.
   - Click on the orange Save & Continue button (Figure 3).

Figure 3: Turn off required data fields in the Addresses, Phone, and Email sections (optional)

4. Client summary opens and shows the client's name (Figure 4).
   - Click on the orange Continue button.

Figure 4: Client summary

5. Pregnancy Information screen opens (Figure 5).
   - Check the checkbox if the Index Parent is pregnant. Enter the Due Date and Number of Babies Expected.
   - Click on the orange Save & Continue button.
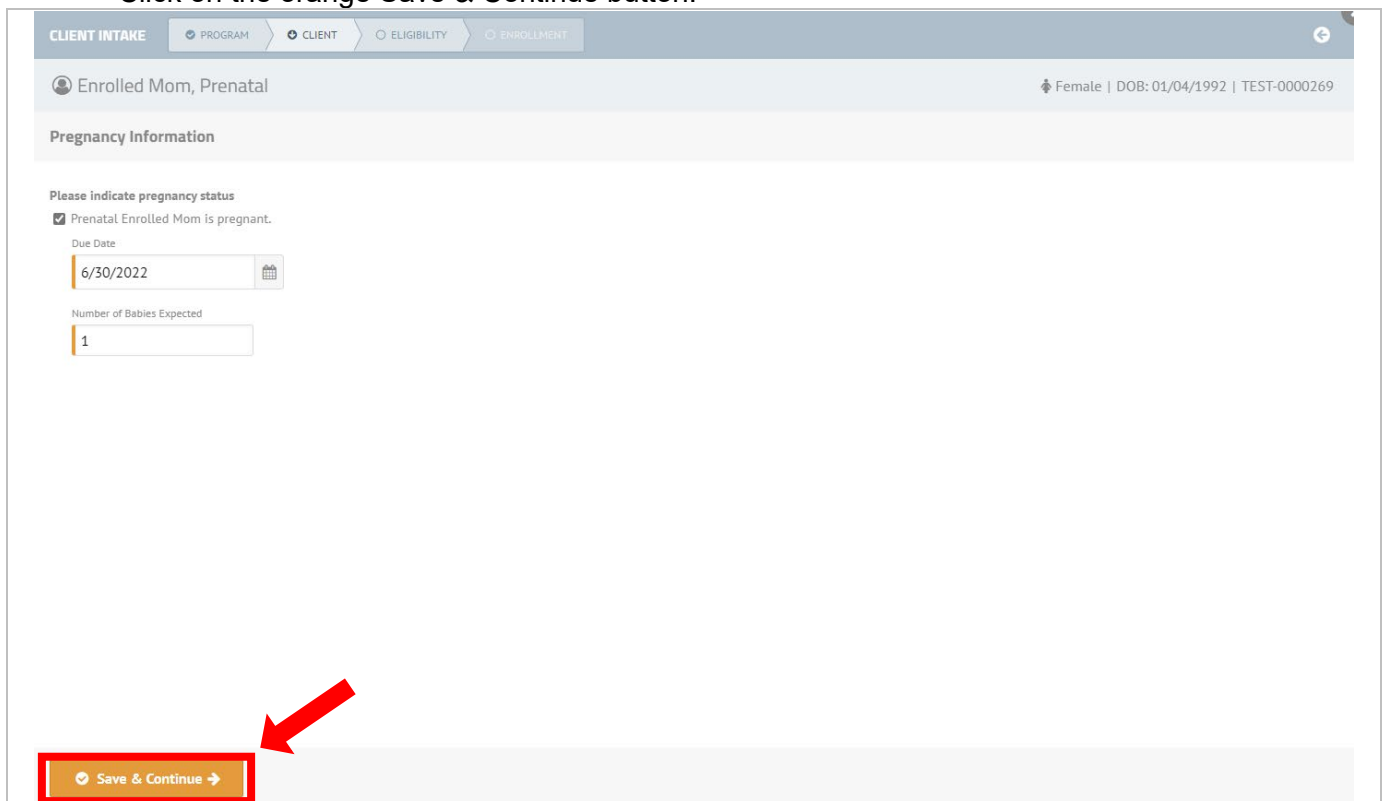
Figure 5: Pregnancy Information

6. Eligibility screen opens (Figure 6).
   - Click orange Save & Continue button.

Figure 6: Eligibility screen

7. Enrollment screen opens (Figure 7).
   - Enter the Enrollment Start Date. Select the correct nurse case manager in the Assigned To field.
   - Click on the green Approve & Enroll button.
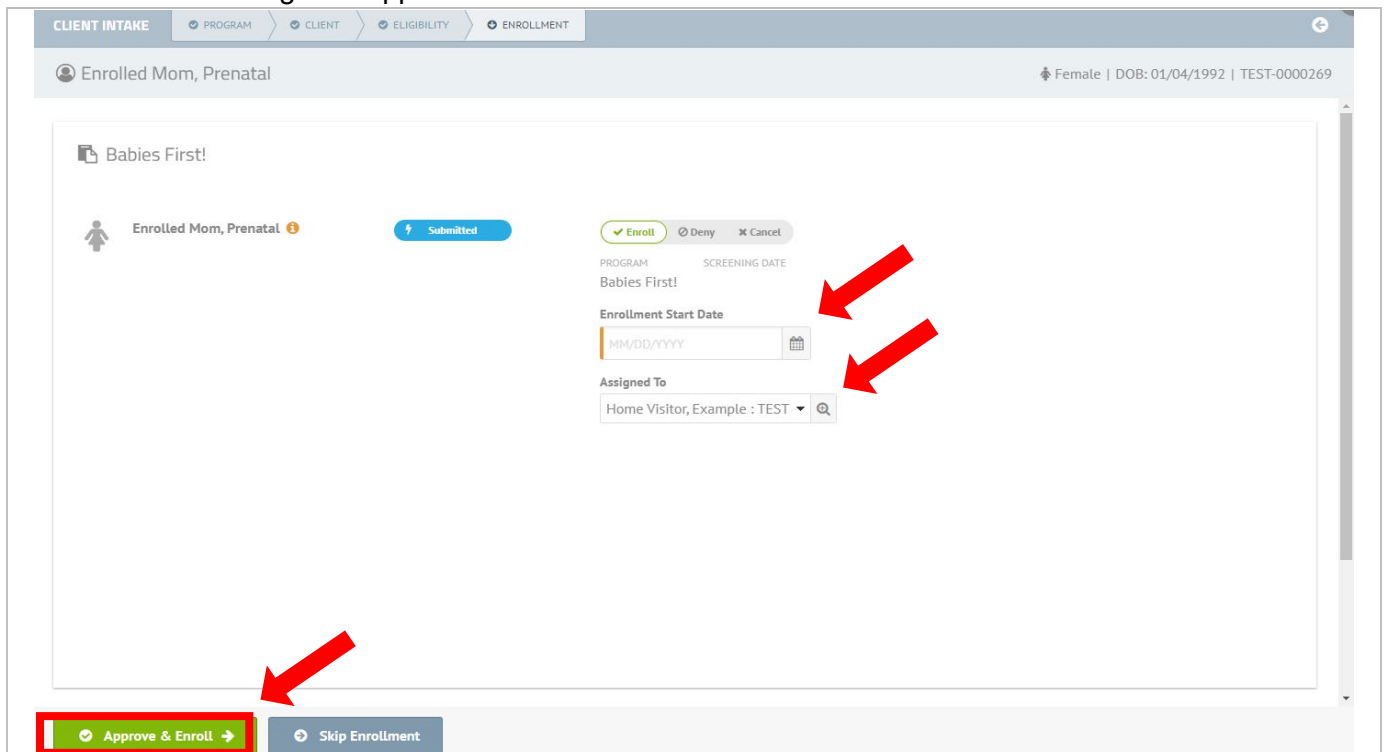
Figure 7: Enrollment Start Date and Assigned To fields

8. Application is completed (Figure 8). Click on the client's Open Care Plan button and follow the instructions in Section 3.5.1, page **45**, to enter the 3 surveys that complete the client's enrollment.
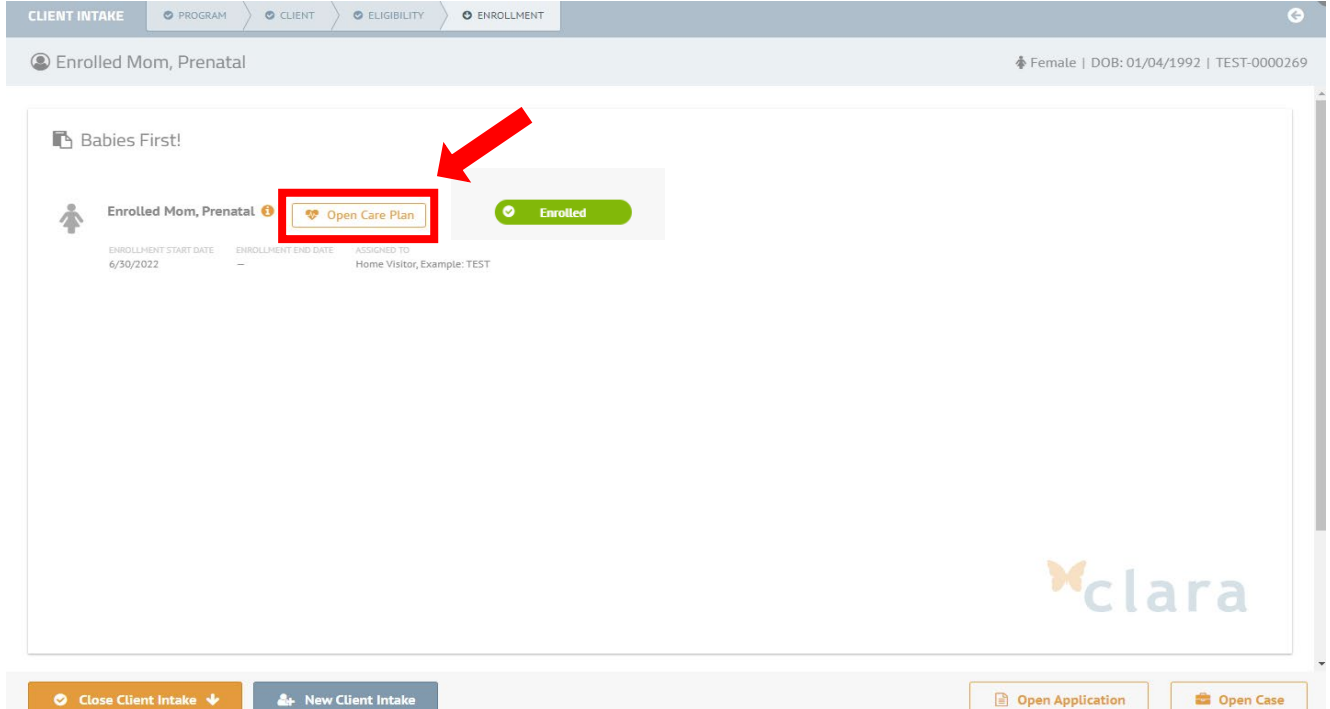
Figure 8: Completed Application

3.3 More than one client enrolls together in the same program: Add New Application

Sometimes two siblings or a caregiver and child enroll together in the same program.

1. From your THEO dashboard, click on New (+) icon to the right of Applications on the Care Menu (Figure 1).

Figure 1: Add New Application

2. Add New Client Information screen opens (Figure 2).
   - Enter client's data in all required fields, which are marked with an orange left border.
   - Also enter Local Client ID and Primary Spoken Language.
   - Click on the orange Save & Continue button.

Figure 2: Add information about first client

3. Turn off contact information fields if preferred (Figure 3).
   - (Optional steps) Uncheck Addresses, Phone, and Email to make these fields not required.
   - Click on the orange **Save & Continue** button.
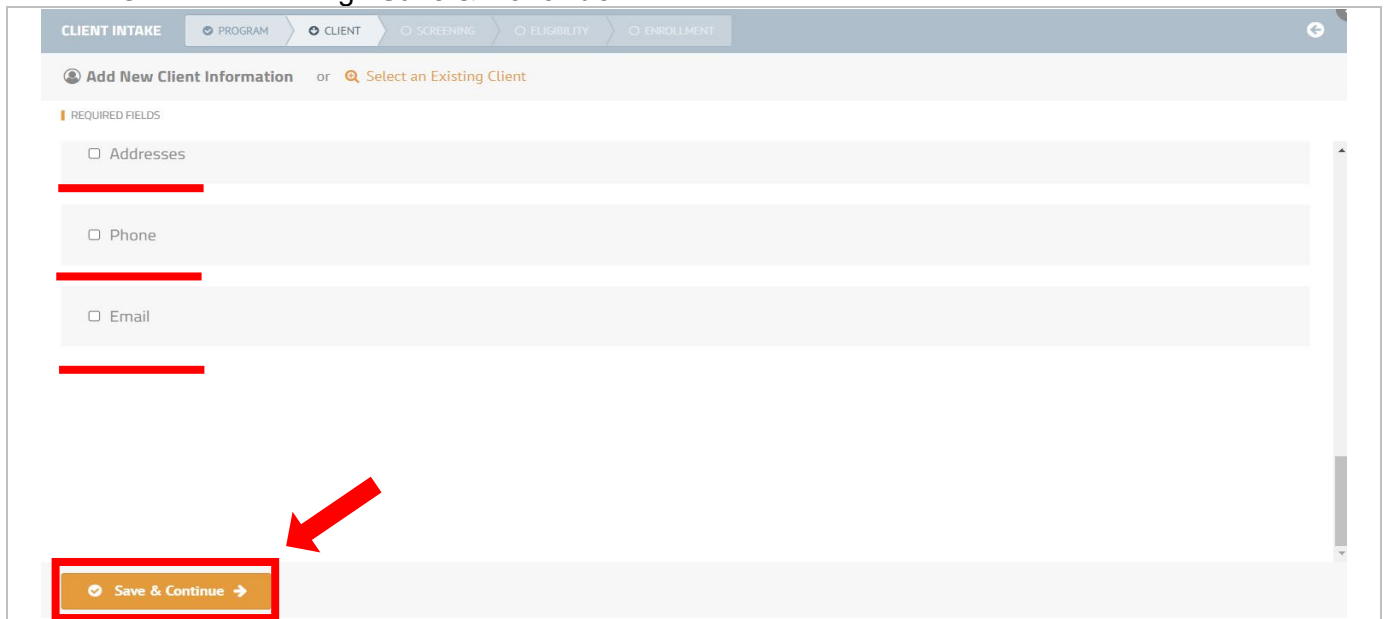
Figure 3: Turn off required data fields in the Addresses, Phone, and Email sections (optional)

4. Client summary opens and shows the client's name (Figure 4).
- Click on + Add Another Client.
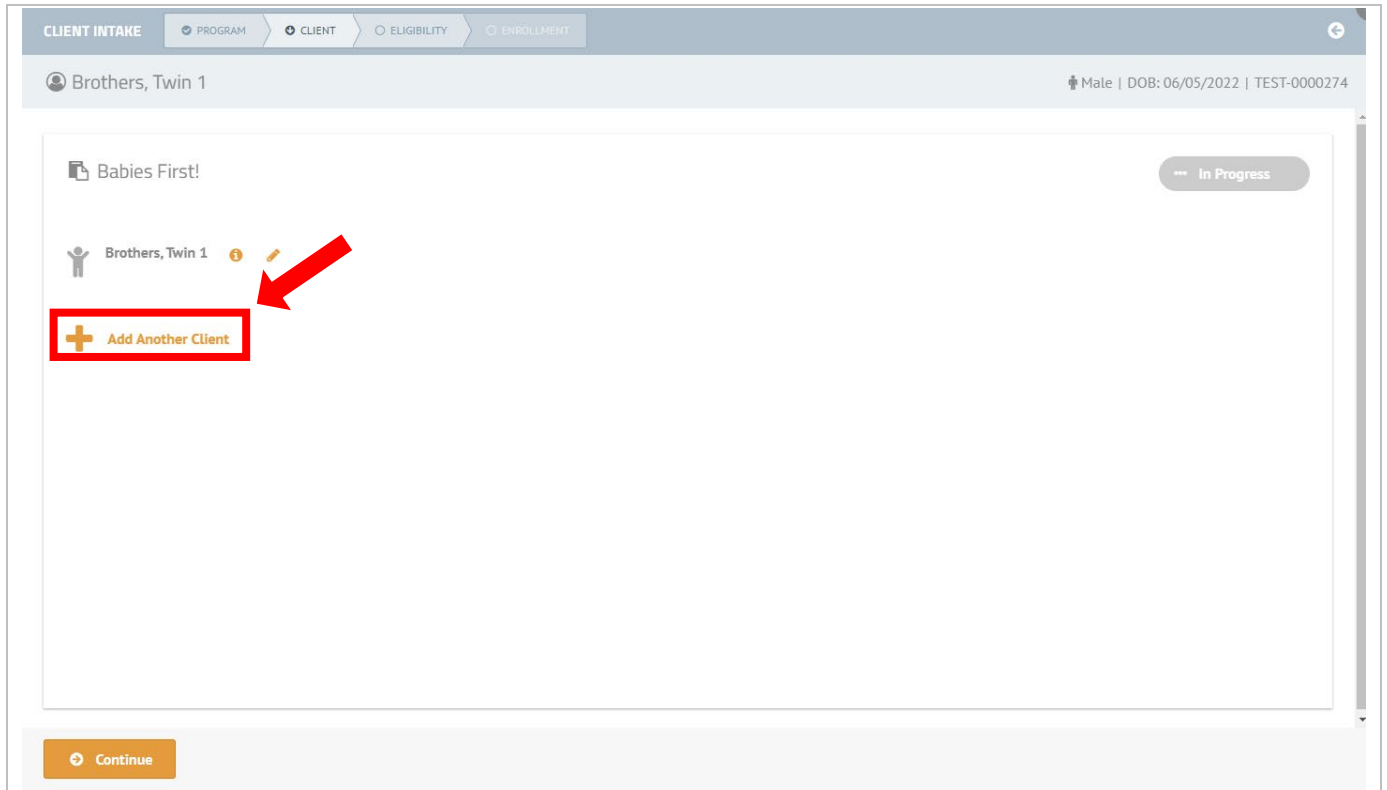
Figure 4: + Add Another Client

5. Add New Client Information screen opens (Figure 5).
- Enter client's data in all required fields, which are marked with an orange left border.
- Also enter Local Client ID and Primary Spoken Language.
- (Optional steps) Turn off contact information fields if preferred. Uncheck Addresses, Phone, and Email to make these fields not required.
- Click on the orange Save & Continue button.
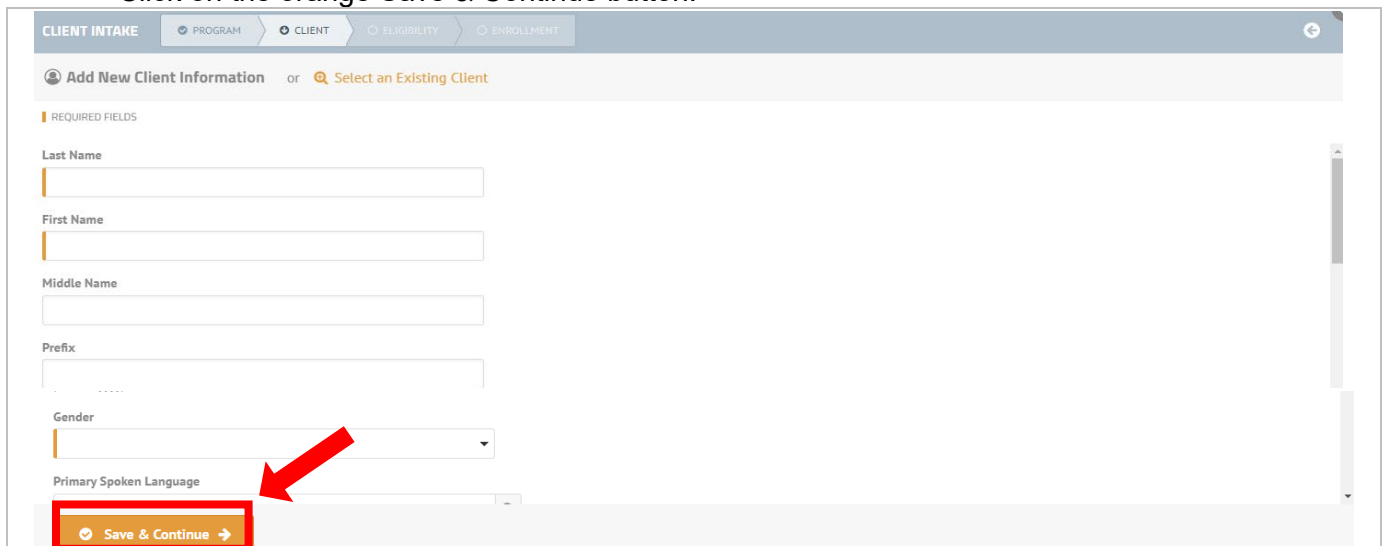
Figure 5: Add information for second client

6. Relationships screen opens (Figure 6).
- Click on the Relationships field to open the drop-down list.
- Select the relationship between the two clients on the Application.
- Click on the orange Save & Continue button.
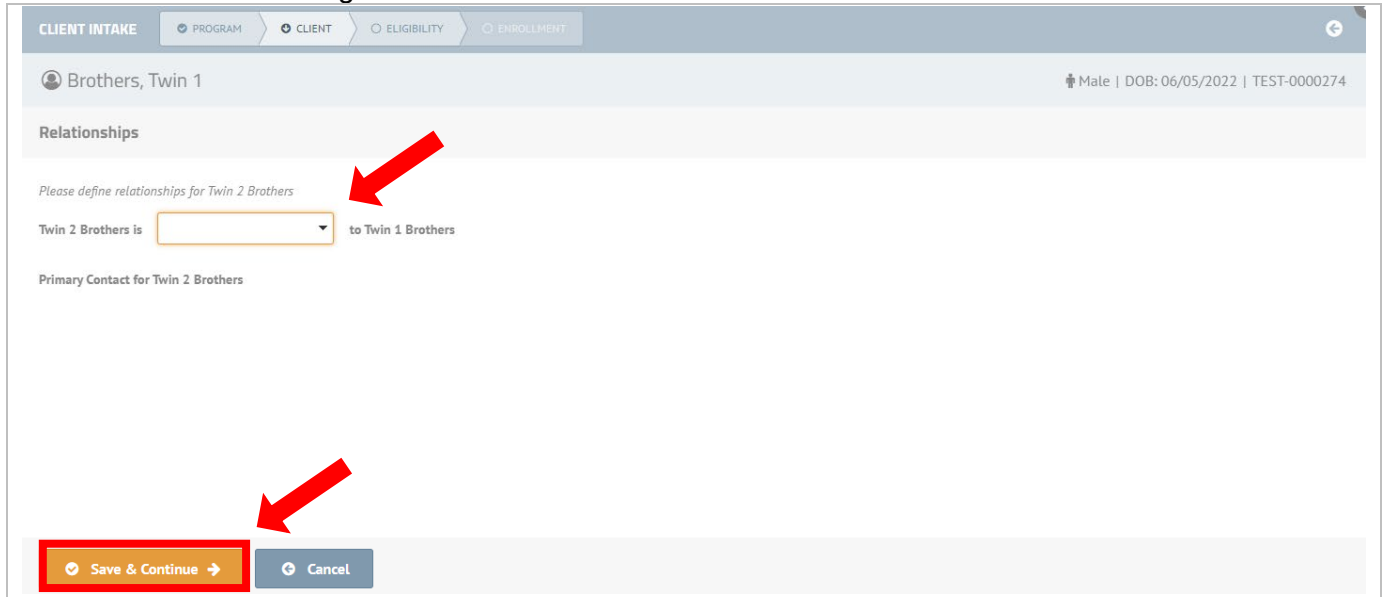
Figure 6: Relationships screen

7. Summary screen displays all clients on the application with their relationships between one another (Figure 7).
- Click on the orange Continue button.
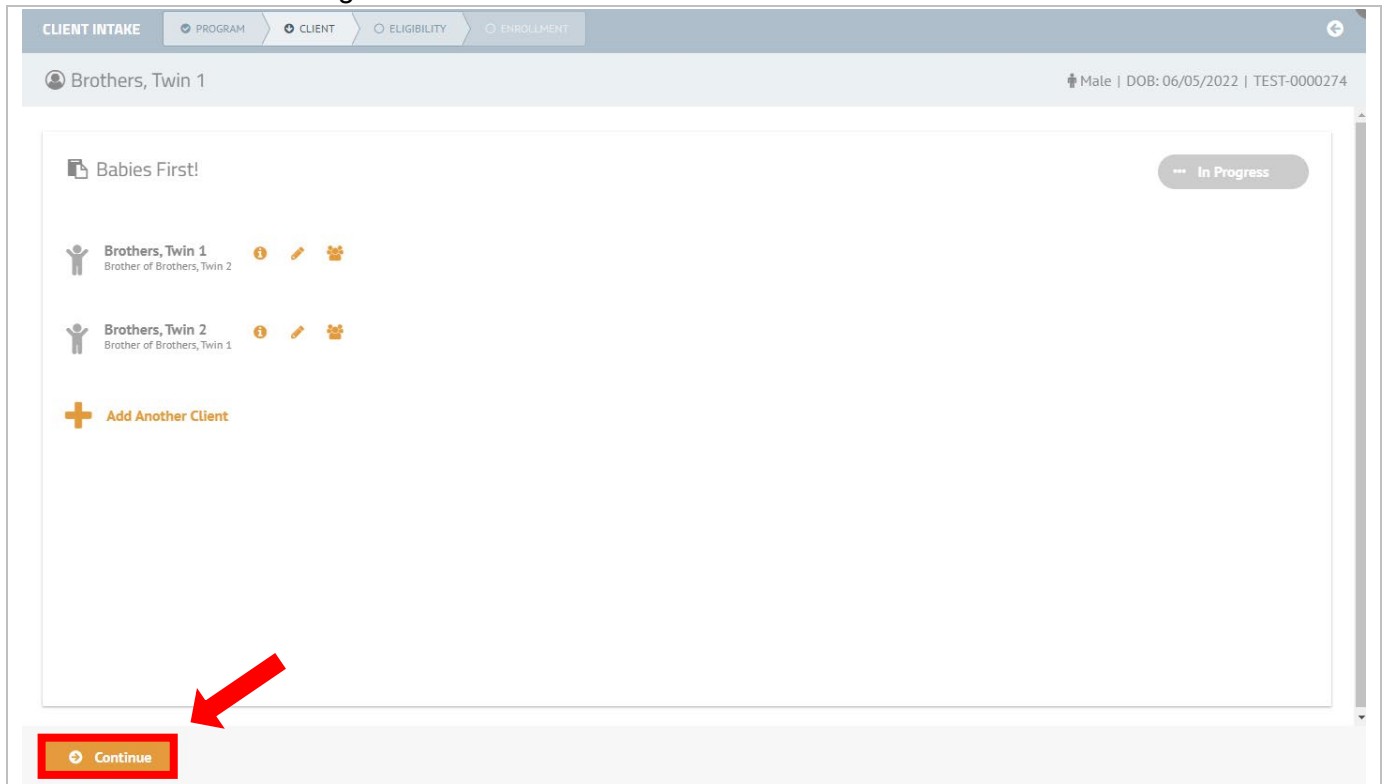
Figure 7: Client summary

8. Enrollment screen opens (Figure 8).
    - Enter the Enrollment Start Date.
    - Enter the correct nurse case manager being assigned to the family in the Assigned To field.
    - Click on the green Approve & Enroll button.
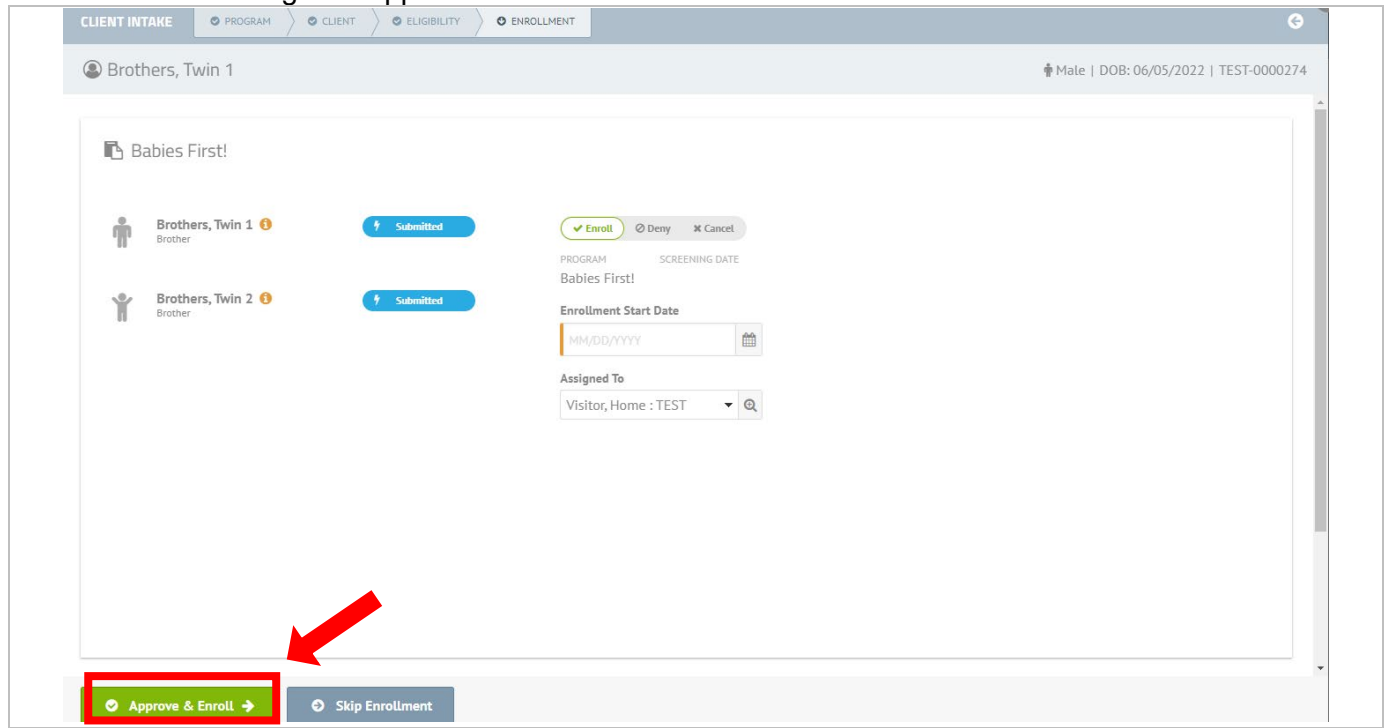
Figure 8: Enrollment Start Date and Assigned To fields

9. Completed application (Figure 9).
    - All clients who enrolled have Open Care Plan buttons and green Enrolled badges to the right of their names.
    - Click on either client's Open Care Plan button. Go to Section 3.5, page **45**, to enter the caregiver's 3 surveys and complete the final steps of enrollment for the pregnant caregiver.
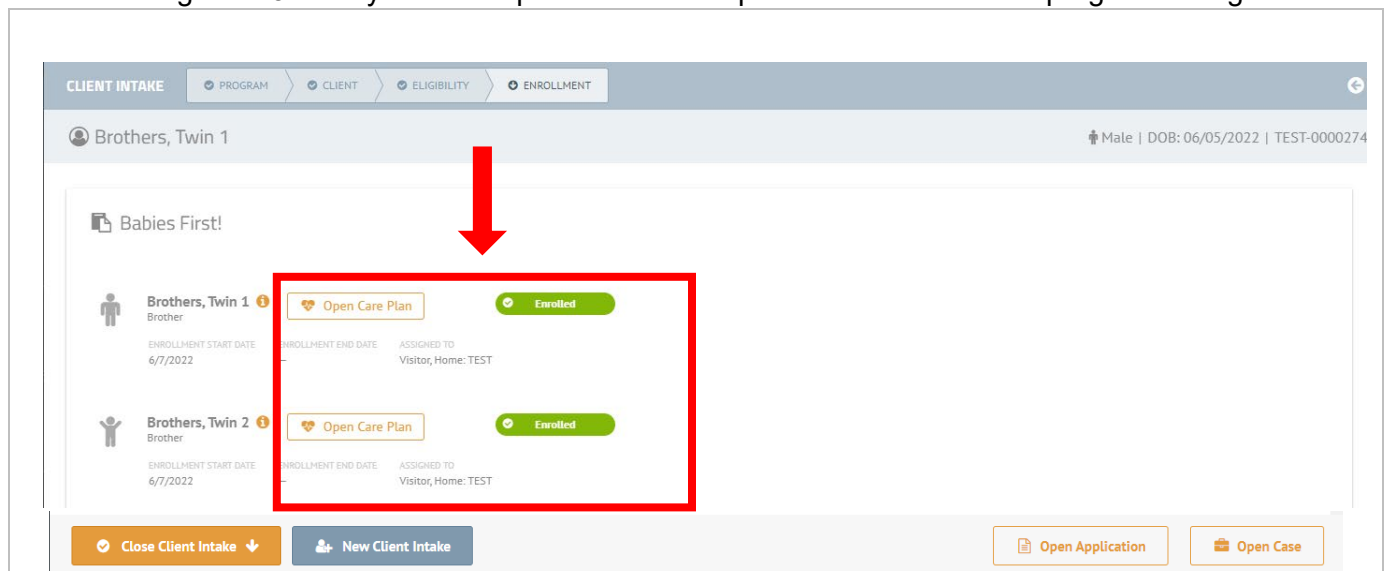
Figure 9: Completed application

3.4   Client enrolls AFTER another family member is enrolled: Add Member

Once someone in a family is enrolled in a program, anyone else from the same family or household who enrolls, can be added from another family member's active Care Plan.

A common reason for adding a new client to a family's Case is enrolling a newborn after a mother's prenatal enrollment. Other common reasons to add a new family member to a Case include changing the caregiver in a Case or enrolling additional children.

1. Open a client's Care Plan from the home visitor dashboard by clicking on the Open icon (Figure 1).
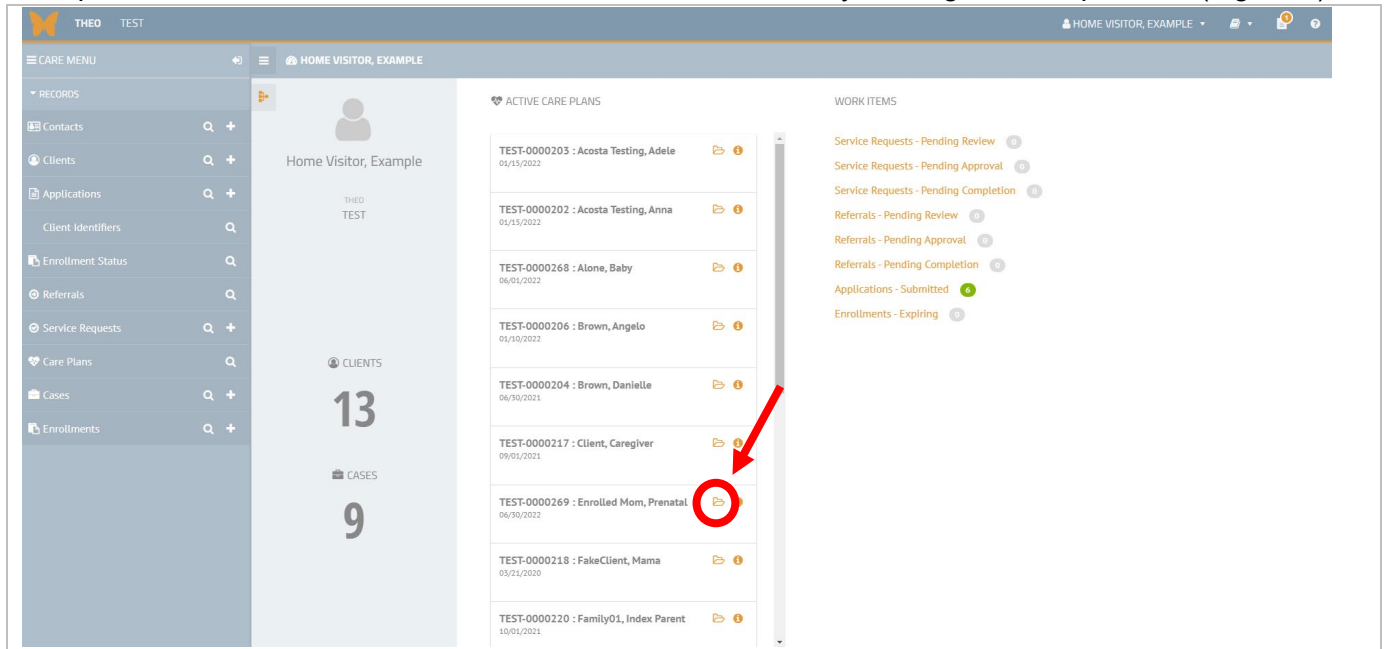
Figure 1: Open Care Plan from a home visitor's dashboard

2. Care Plan opens (Figure 2).
   - Mouse over the Gear/Daisy icon in the upper right corner to open the Actions menu.
   - Click on "Add Member".
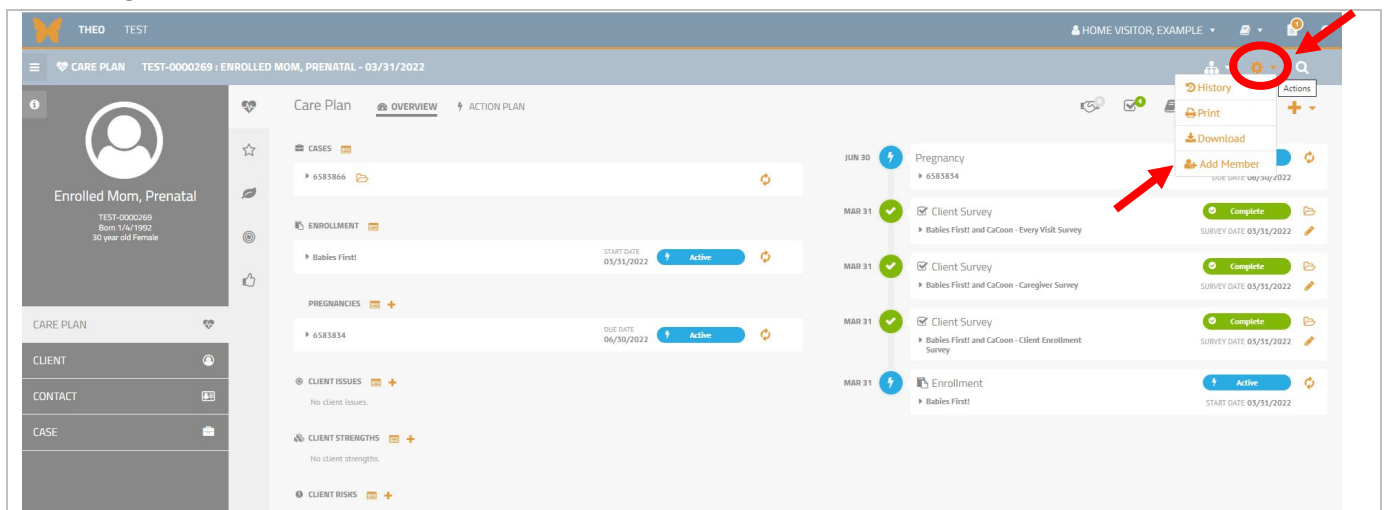
Figure 2: Add Member on the Actions menu

3. The Application process opens. The client who enrolled earlier appears at the top (Figure 3).
   - Enter the new client's information.
   - Click on the orange Save & Continue button.

Figure 3: Add New Client Information screen

4. Relationships screen opens (Figure 4).
   - Select the relationship between the new client and the already enrolled client.
   - Click on the orange Save & Continue button.

Figure 4: Relationships

5. Client summary opens (Figure 5).
   - Client ("Enrolled Mom, Prenatal") who enrolled earlier shows an "Enrolled" status.
   - New client ("Newborn, Baby") is listed without an "Enrolled" status.
   - Click on the orange Continue button.
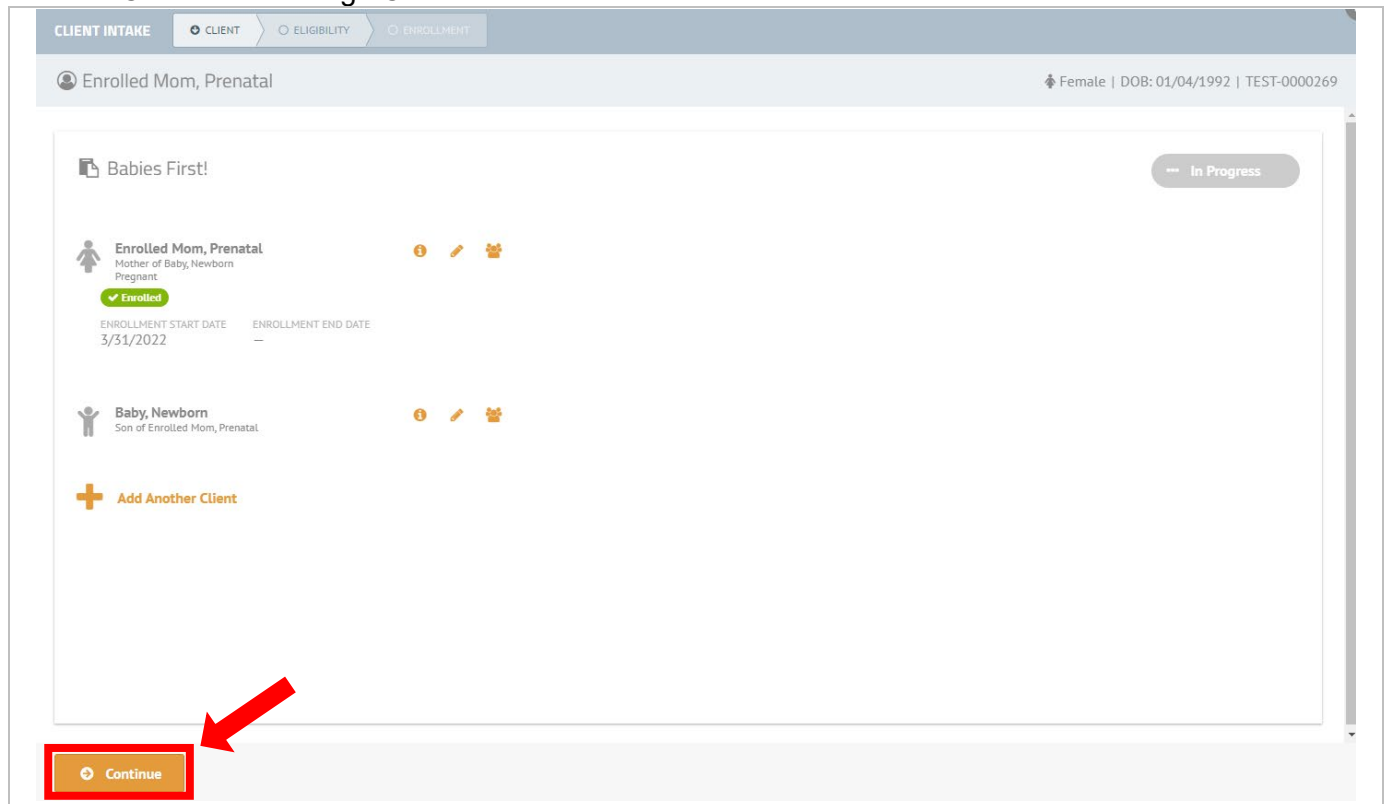
Figure 5: Client summary

6. Pregnancy Information screen opens (Figure 6).
   - Do NOT check that the caregiver is pregnant. This application is enrolling the newborn.
   - Click on the orange Save & Continue button.
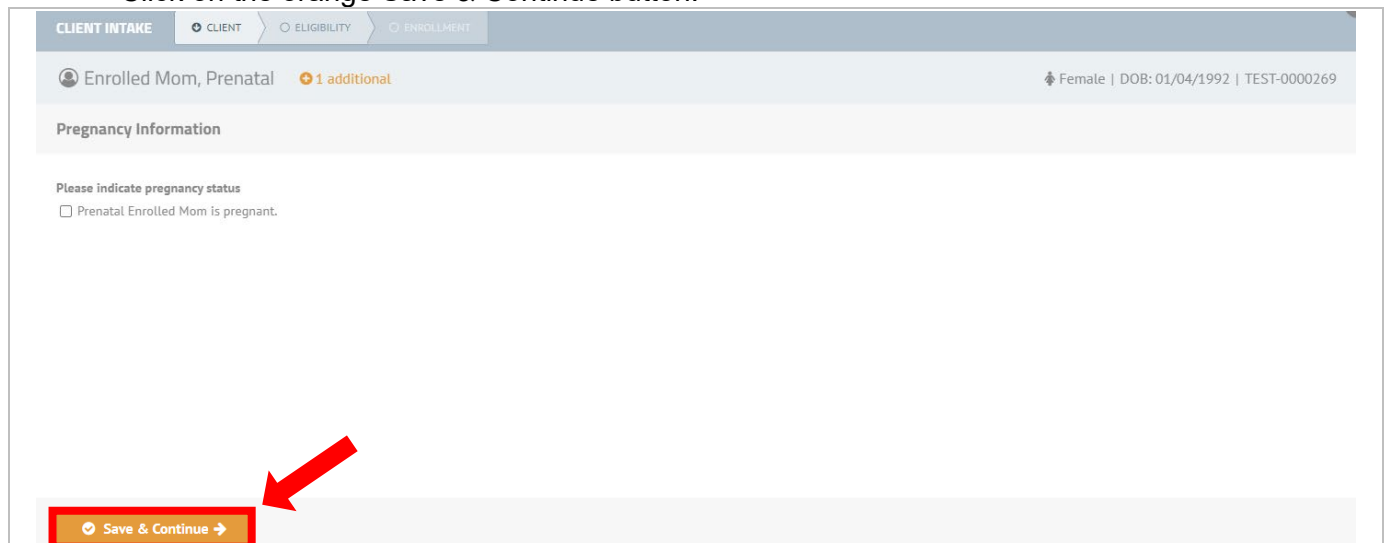
Figure 6: Pregnancy Information

7. Eligibility screen opens (Figure 7).
   - The caregiver who enrolled earlier shows an "Enrolled" status. The new client shows as applying to enroll.
   - Click on the orange Save & Continue button.
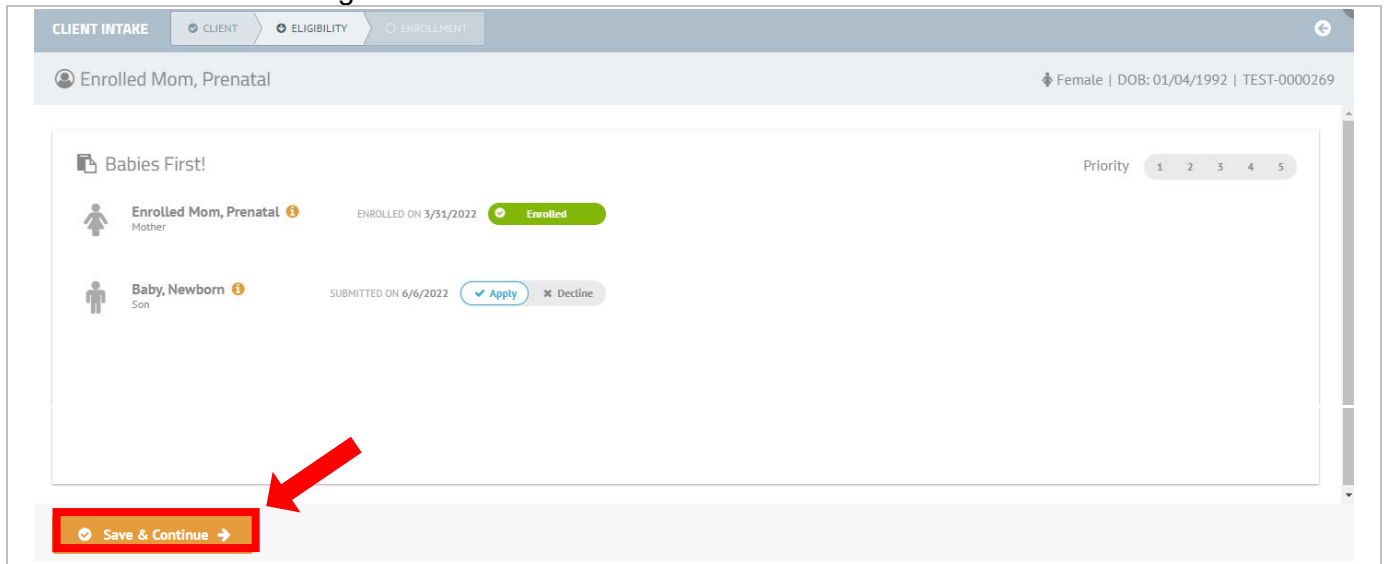
Figure 7: Eligibility screen

8. Enrollment screen opens (Figure 8).
   - Enter the Enrollment Start Date.
   - Click on the green Approve & Enroll button.
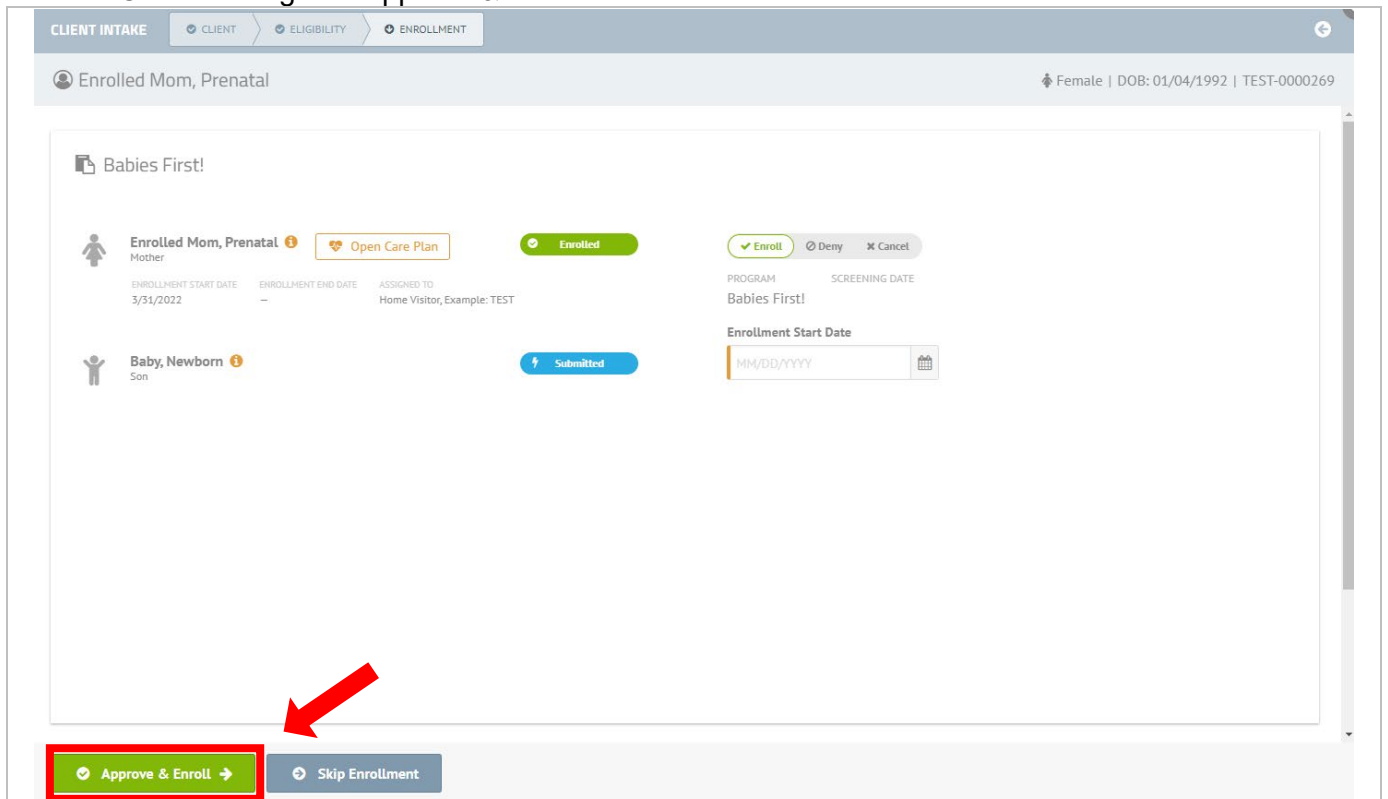
Figure 8: Enrollment screen

9. Application is completed (Figure 9).

- Click on the newborn's Open Care Plan button and follow the instructions in Section 3.5.1, page **45**, to enter the 3 surveys that complete each client's enrollment.
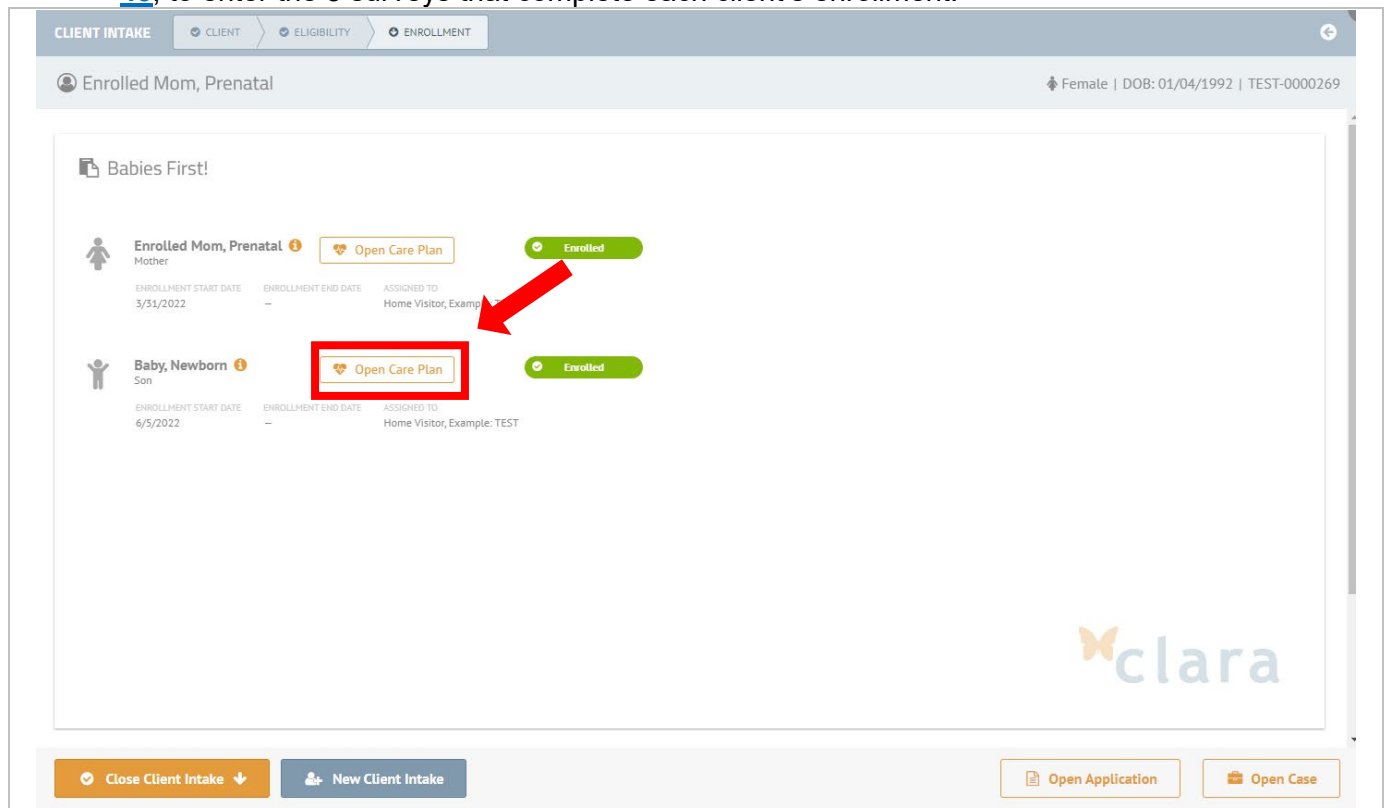
Figure 9: Completed Application

3.5 Final Steps of Enrollment

To complete each client's enrollment:

- Add 3 surveys to the Care Plan for <u>each</u> client with a new enrollment;

    1. Babies First! and CaCoon - Client Enrollment Survey

    2. Babies First! and CaCoon - Every Visit Survey

    3. Babies First! and CaCoon - Caregiver Survey
       or Babies First! and CaCoon - Infant and Child Survey (for the child)
       or CaCoon - Child or Youth Survey

- Update the pregnancy record for any caregiver whose pregnancy has ended. When a pregnant caregiver enrolls alone, and then the child is born and enrolls, update the postpartum caregiver's pregnancy record with the child's birth.

3.5.1 Three surveys complete each new client's enrollment

1. Add new surveys to each client's Care Plan (Figure 1).
   - From a client's Care Plan, mouse over the (+) Add New icon. Menu opens.
   - Click on Client Surveys.
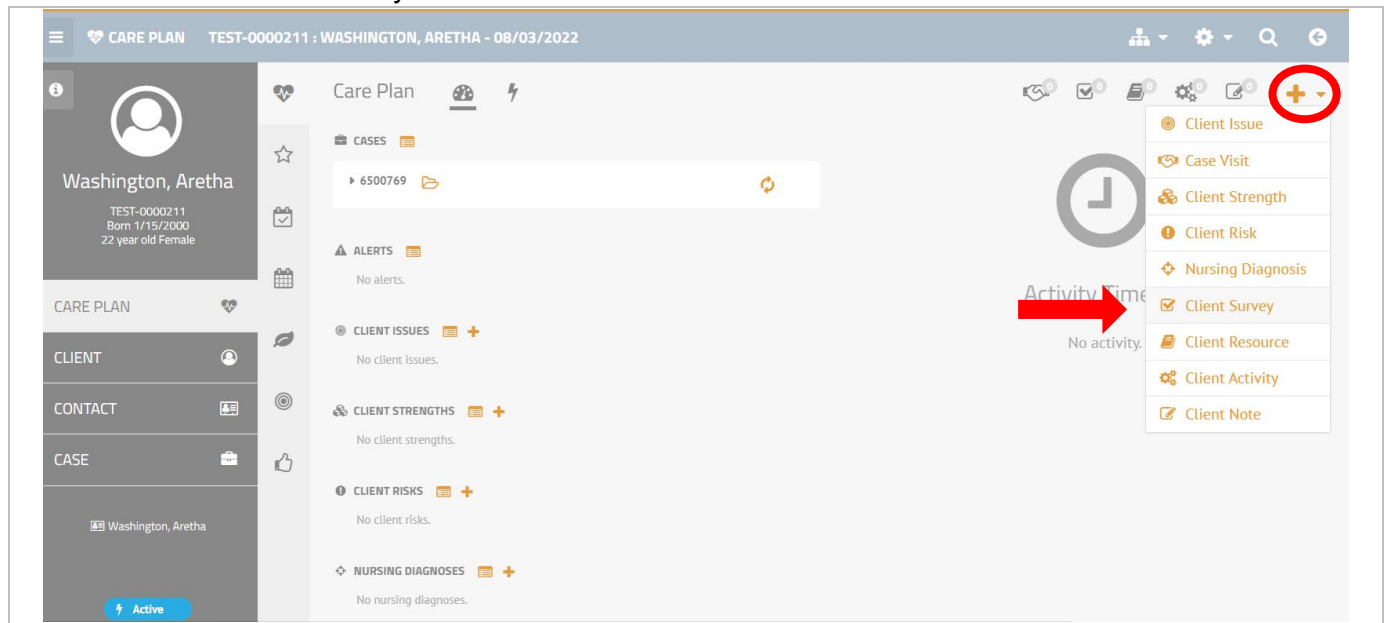
Figure 1: Client's Care Plan

2. Select Survey screen opens (Figure 2).
- Click on Babies First! and CaCoon – Client Enrollment Survey. Every client at enrollment has an enrollment survey added to their Care Plan.
- Click on orange Save & Continue button.

Figure 2: Client Enrollment Survey

3. Edit Existing Client Survey Information (Figure 3).
- Enter the enrollment start date in the Survey Date field.
- Select the staff who completed the survey form in the Completed By field.
- Click on the orange Save & Continue button.

Figure 3: Client Survey

4. Next screen, with survey questions, opens (Figure 4).
   - Scroll down the window and complete every question that is appropriate for the specific client enrolling. For example, some questions are only for prenatal or postpartum caregivers, and some questions are for clients at specific ages.
   - Click on orange Save & Continue button(s) until you are finished entering all survey data.

Figure 4: Client survey questions

5. Survey closes after last page is saved, and client's Care Plan opens (Figure 5).
   - Completed enrollment survey displays in the Activity Timeline

Figure 5: Completed Client Enrollment Survey for caregiver

6. Repeat Steps 1 through 5, starting on page <u>**45**</u>, to enter a <u>Visit survey</u> and a <u>Caregiver survey</u> for the caregiver's enrollment visit.

- Enter the first visit date (same as the enrollment start date) in the Survey Date fields of the Visit Survey and the Caregiver Survey.
- There will be 3 total surveys on the Activity Timeline for the caregiver's enrollment (Figure 6).
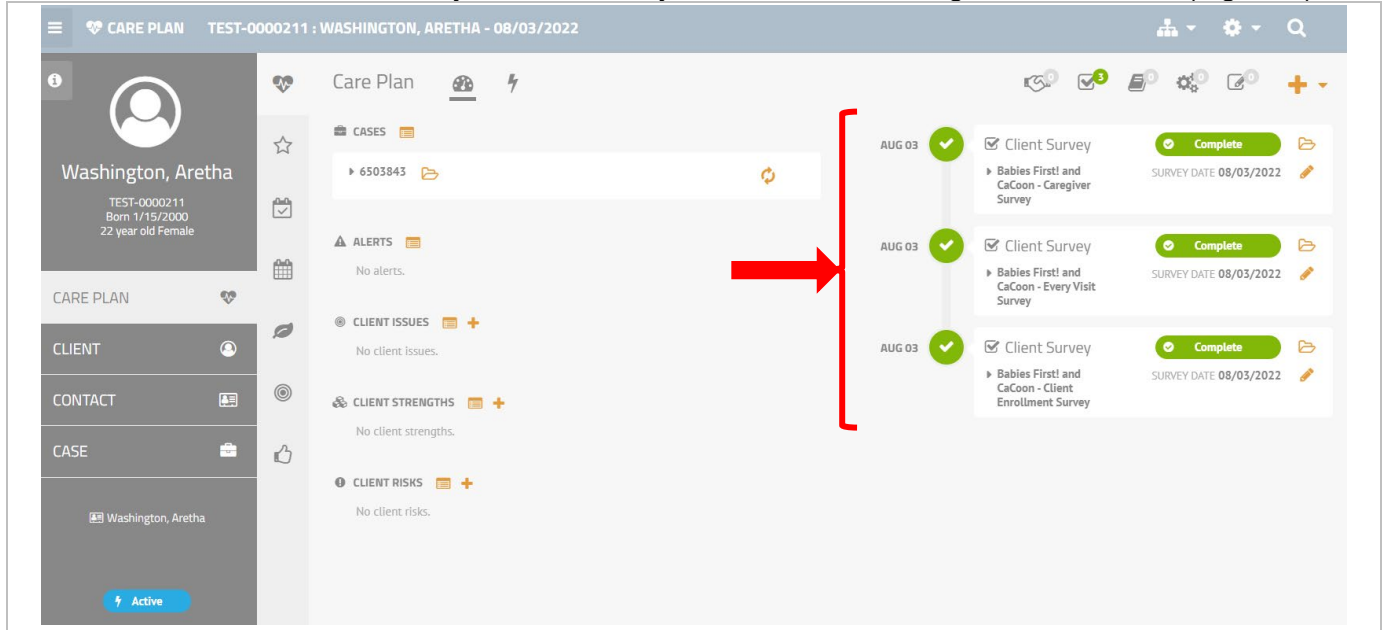
Figure 6: The 3 surveys that record the enrollment visit for the caregiver

3.5.2 Go to another family member's Care Plan

You can open another family member's Care Plan without leaving the family's Case or having to search, which can take more time. Continue from the end of Step 3.5.1 (above).

1. From a client's Care Plan, click on the Case tab (Figure 1).
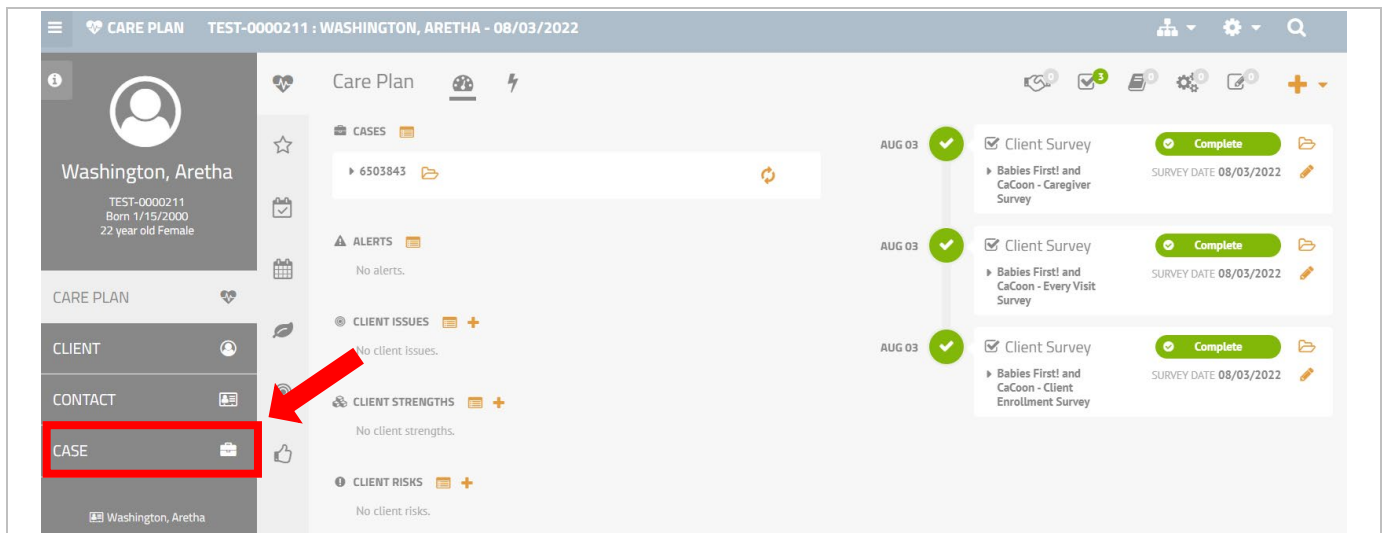
Figure 1: Case tab on the client's Care Plan

2. Client's Case tab opens and lists all enrollments for a family over time in the Care Plans section (Figure 2).
- The blue "Active" badges on both Care Plans indicate the clients are still enrolled. (A green "Complete" badge is not shown below, but it would indicate a client who was enrolled in the past and is disenrolled now.)
- Click on the open icon to the right of the other family member's name.
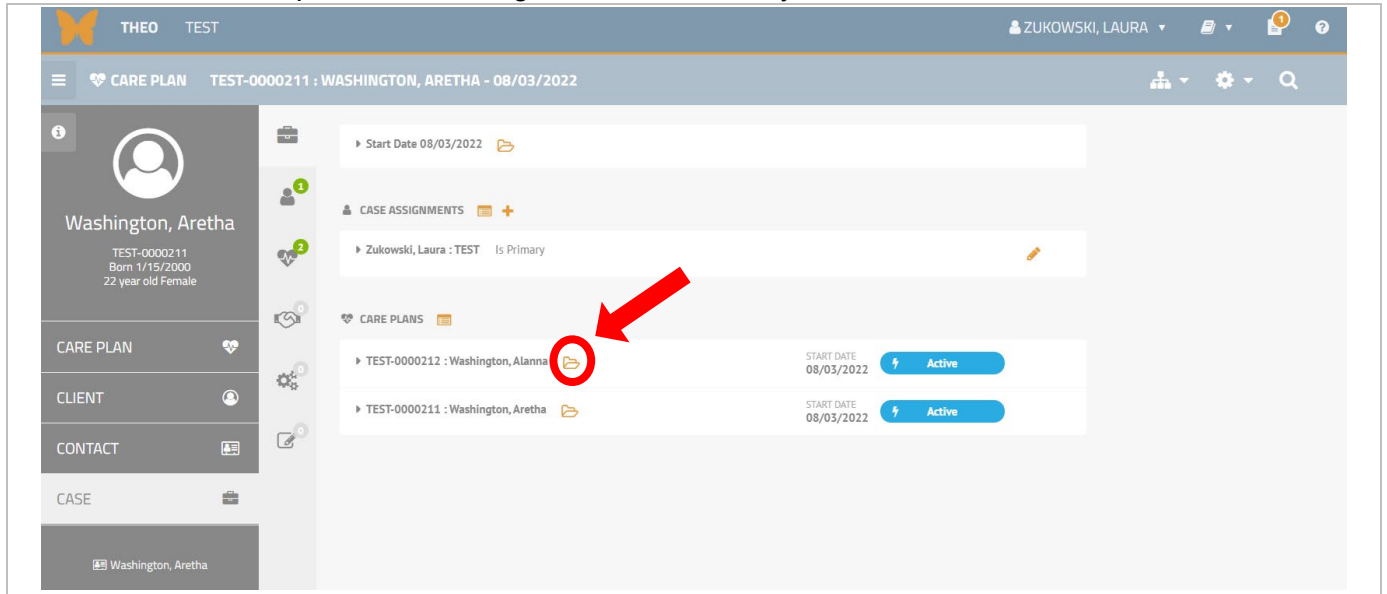
Figure 2: Open the other client's Care Plan

3. Care Plan opens for the other enrolled family member in the Case (Figure 3).
Repeat Steps 1 through 6 in section 3.5.1. (page **45**) to enter 3 surveys to complete the other client's enrollment:
- Babies First! and CaCoon - Client Enrollment Survey
- Babies First! and CaCoon - Every Visit Survey
- Babies First! and CaCoon – Caregiver Survey
  or Babies First! and CaCoon - Infant and Child Survey
  or CaCoon – Child and Youth Survey
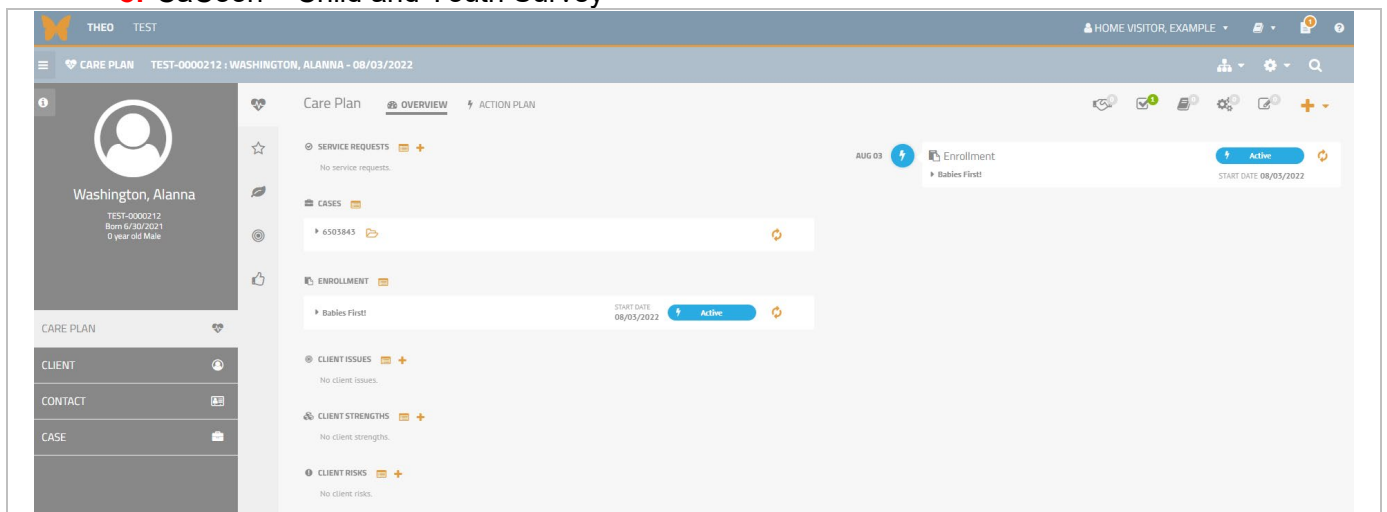
Figure 3: Care Plan for the other family member

4. After you have entered the 3 surveys for the enrollment, the Care Plan shows the 3 surveys in the Activities Timeline (Figure 4).
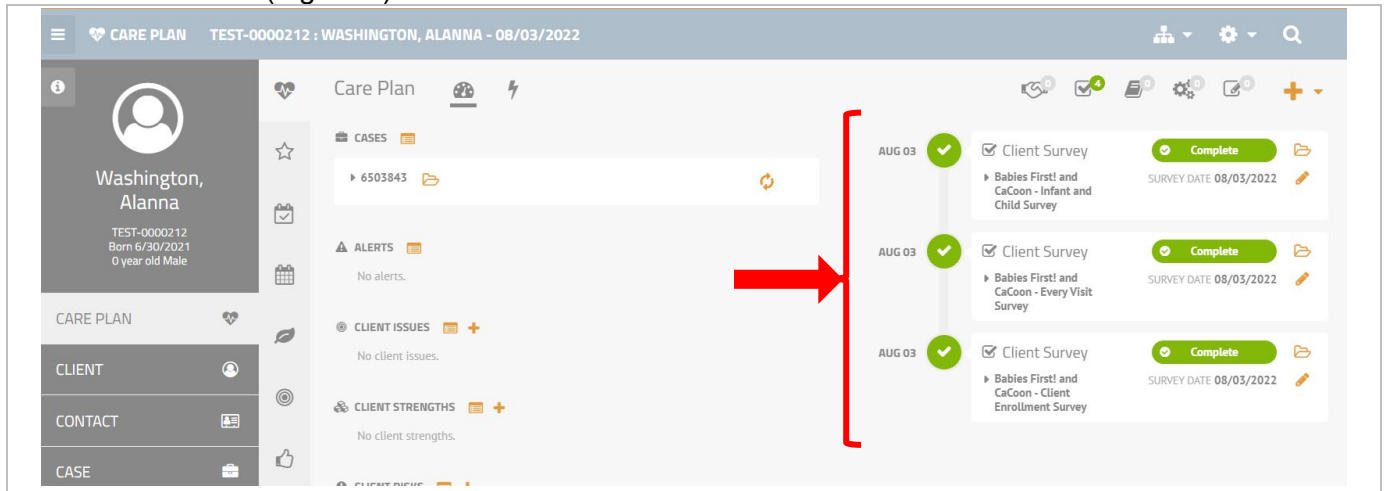
Figure 4: The 3 surveys that complete the enrollment for the other client

3.5.3 Update the postpartum caregiver's pregnancy record when enrolling the newborn

Always update a caregiver's pregnancy record after the pregnancy ends. Enter the pregnancy outcome information when you enroll a postpartum caregiver's newborn.

1. Open the Care Plan of a client who enrolled prenatally.

- From your THEO dashboard, click on the Open icon to the right of the client's name (Figure 1).
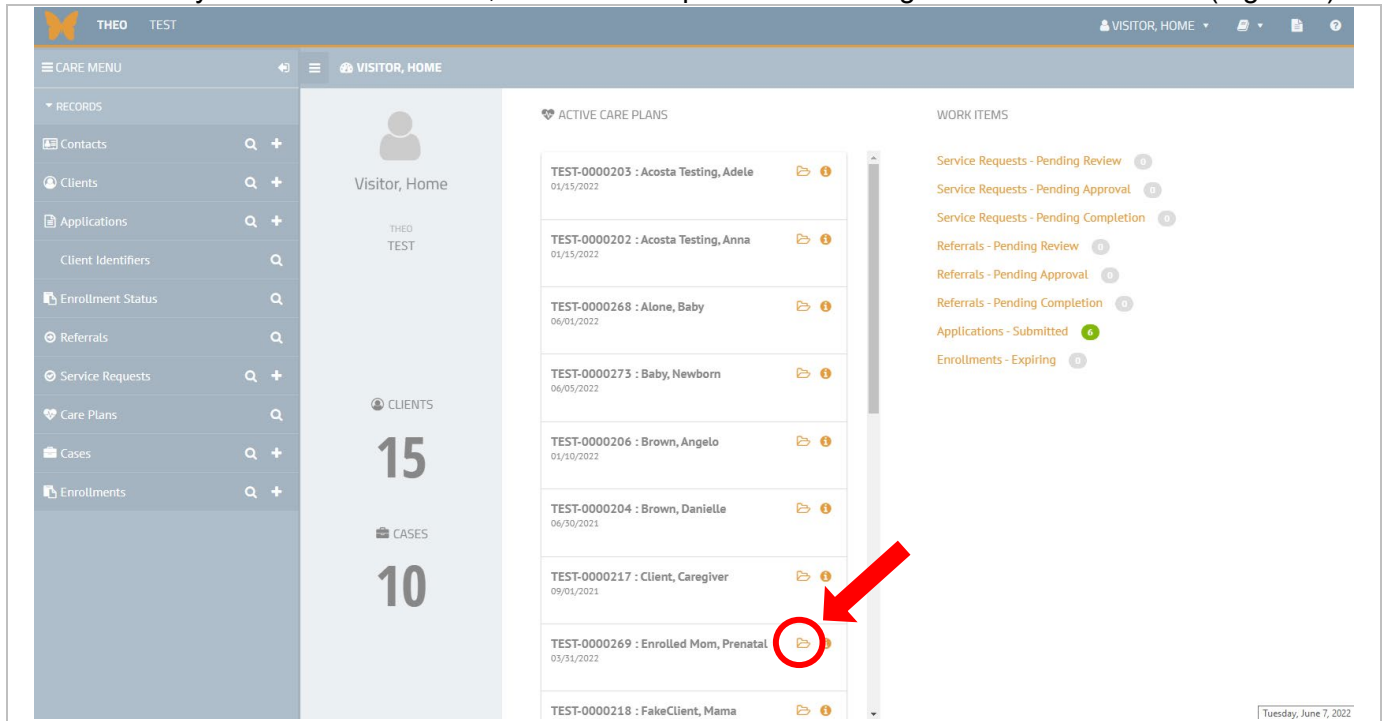
Figure 1: Open a client's Care Plan

2. Client's Care Plan opens (Figure 2).
   - Click on the Update Pregnancy icon, either in the Activities Timeline, in the top right of the screen, or in the Pregnancies section, near the center of the screen.
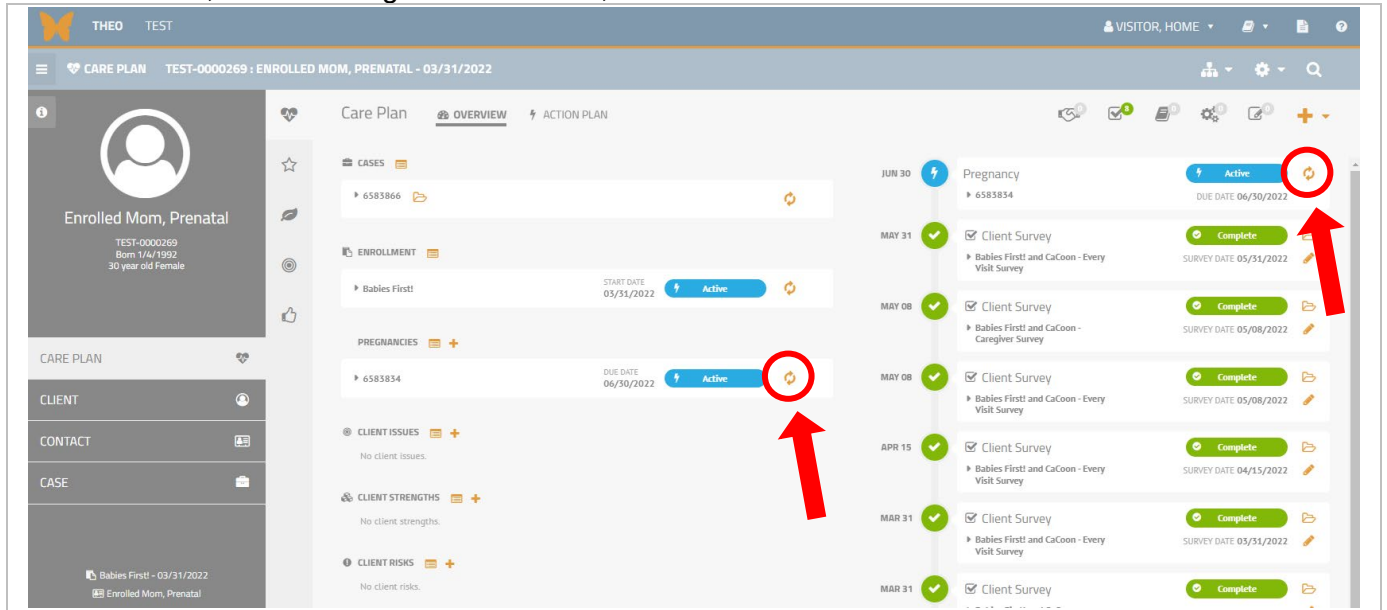
Figure 2: Update Pregnancy icons in the Pregnancies section and the Activities Timeline

3. Pregnancy record opens (Figure 3).
   - Enter the Birth Outcome and the Birth / End Date
   - Click on the orange Update & Close button.
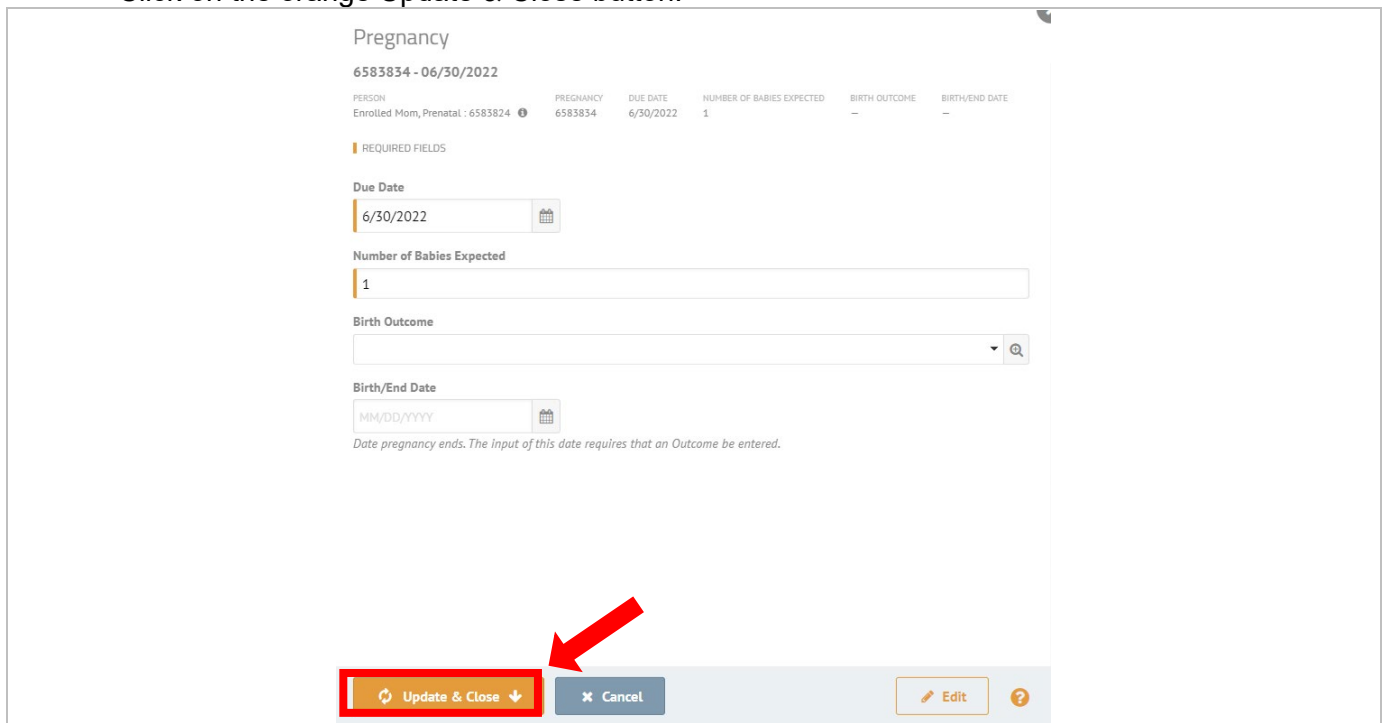
Figure 3: Pregnancy record

4. Pregnancy record closes and you are back on the caregiver's Care Plan (Figure 4).
- The Pregnancy record shows "Complete" status in both the Activities Timeline and in the Pregnancies section.
- Pregnancy Outcome has been created and displays in both the Activities Timeline and in the Pregnancies section.

Figure 4: Pregnancies and Pregnancy Outcomes

4.0 Disenrollment

THEO records disenrollment data separately for each client who leaves the program. Disenrollment includes either 2 or 3 steps in THEO for each client, depending on whether the client had a disenrollment visit.

Disenrollment steps for each client in THEO:

- Add Babies First! and CaCoon - Client Closure Survey
- Add Babies First! and CaCoon - Every Visit Survey (if a disenrollment visit occurred)
- Enter Disenrollment End Date on the Enrollment record

4.1 Clients surveys for disenrollment

Repeat Steps 1 through 6 in section 3.5.1. (page **45**) to enter 1 or 2 surveys for each client who disenrolls.

- Babies First! and CaCoon - Client Closure Survey is required for <u>all clients</u> at disenrollment.
- Also enter a Babies First! and CaCoon - Every Visit Survey <u>if a disenrollment visit occurred</u>.

4.2 Enrollment End Date

Update each client's enrollment record with the Enrollment End Date.

- From a home visitor's dashboard, click on the Open icon to the right of a client's name in the list of Active Care Plans (Figure 1).
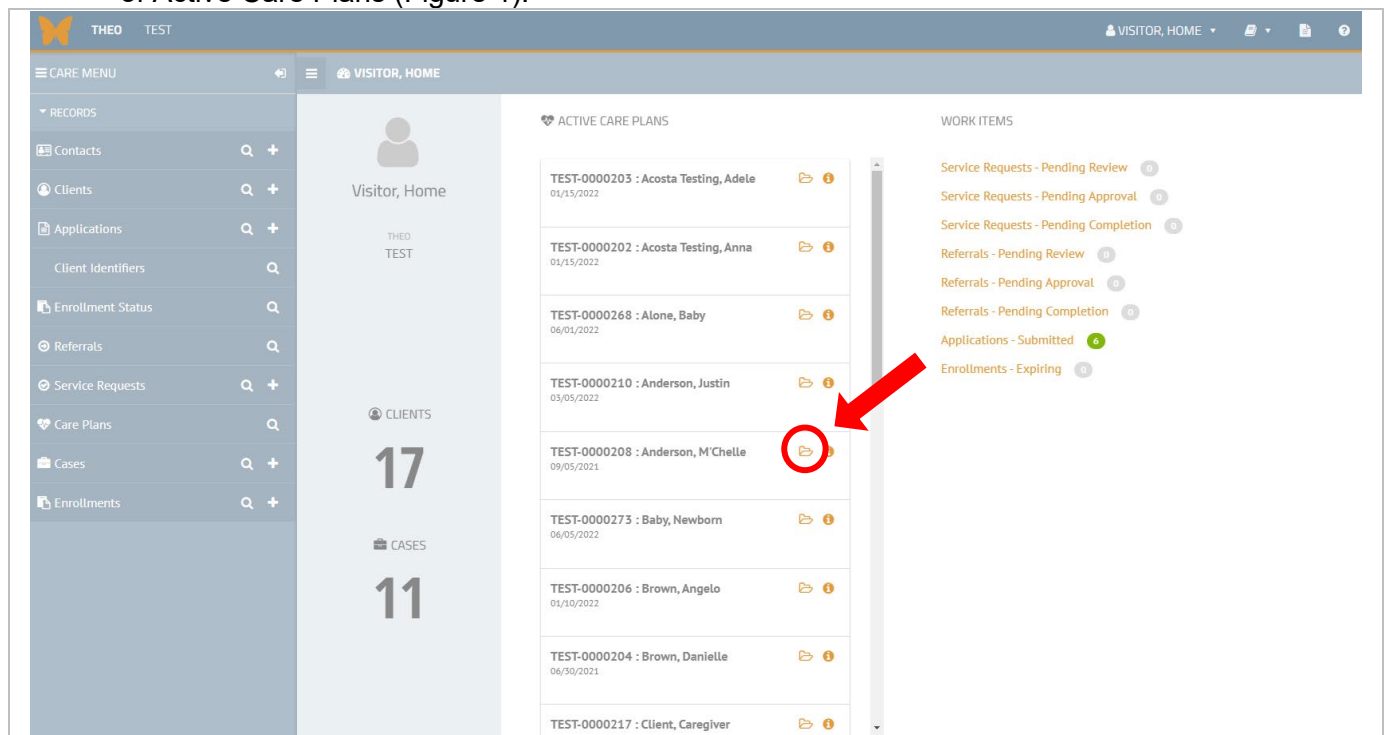
Figure 1: Home visitor dashboard - Open a client's Care Plan

Client's Care Plan opens (Figure 2).
- In the Enrollment section, click on the Update Enrollment icon.
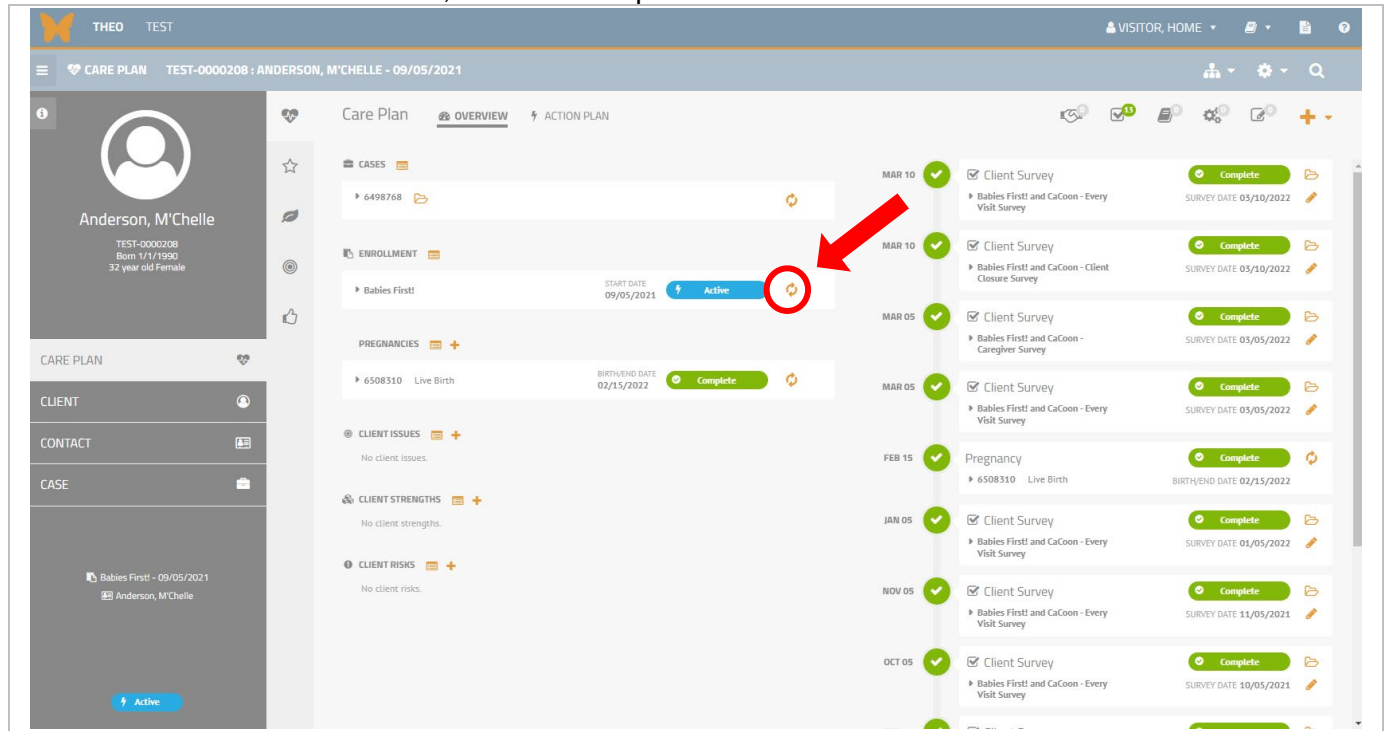
Figure 2: Update Enrollment icon

Enrollment record opens (Figure 3).
- Enter the Enrollment End Date
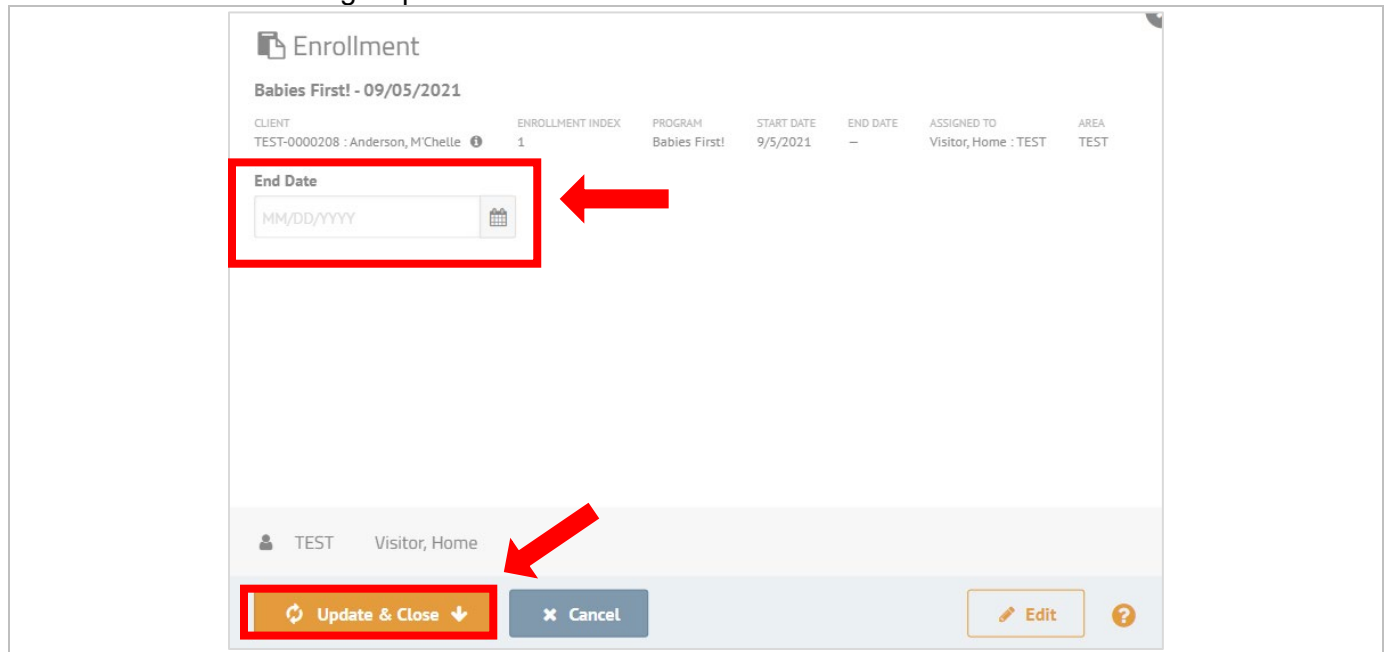- Click on the orange Update & Close button.

Figure 3: Enrollment record

Caregiver's enrollment record closes (Figure 4).
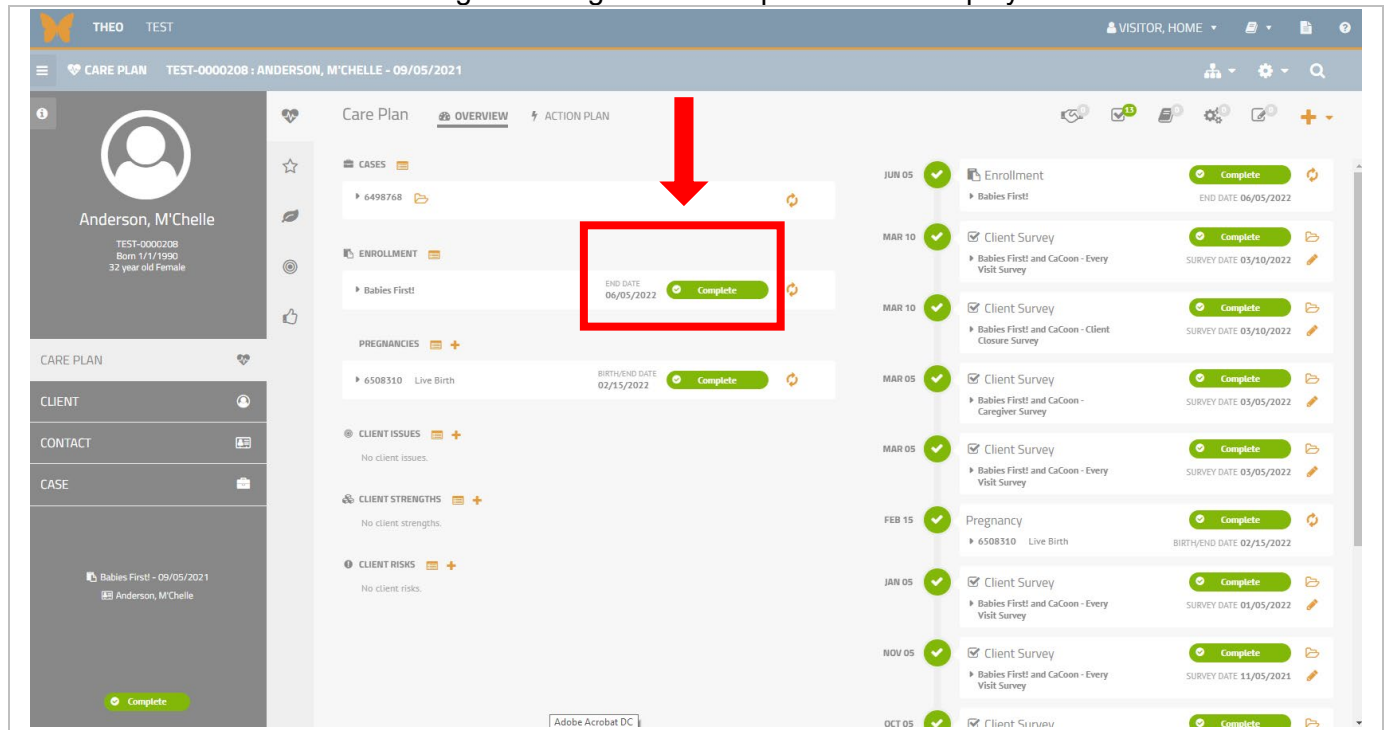- Enrollment End Date and green badge with "Complete" status display on the enrollment record.

Figure 4: Updated enrollment record with a "Complete" status

Return to your THEO dashboard.
- Click on the orange Butterfly in the top left of your screen (Figure 5).
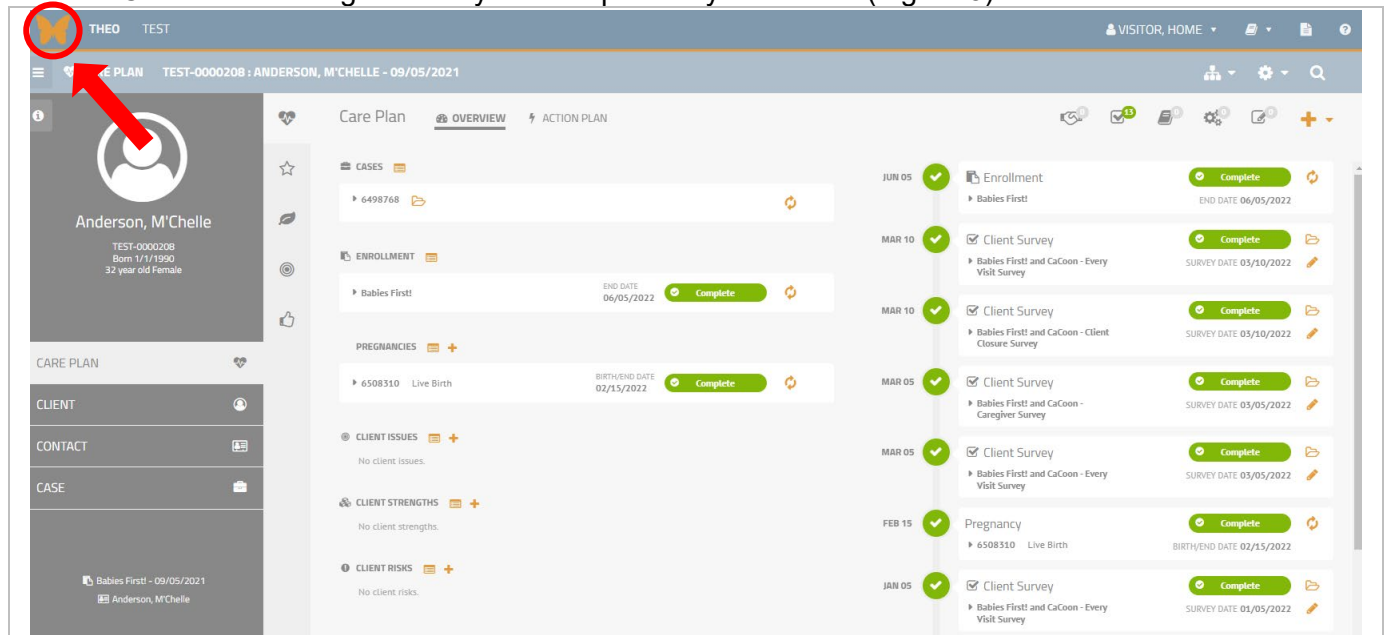
Figure 5: Orange butterfly returns you to your THEO dashboard

All clients with End Dates entered on their enrollment record no longer appear on the case manager's list of assigned clients or Active Care Plans.

- The (fictitious) "Anderson, M'Chelle" caregiver no longer appears in the home visitor's list of Active Care Plans (Figure 6). Note: List is alphabetized by last name.
- Repeat Steps 1-5 (page **53**) for any other enrolled family members who are disenrolling.
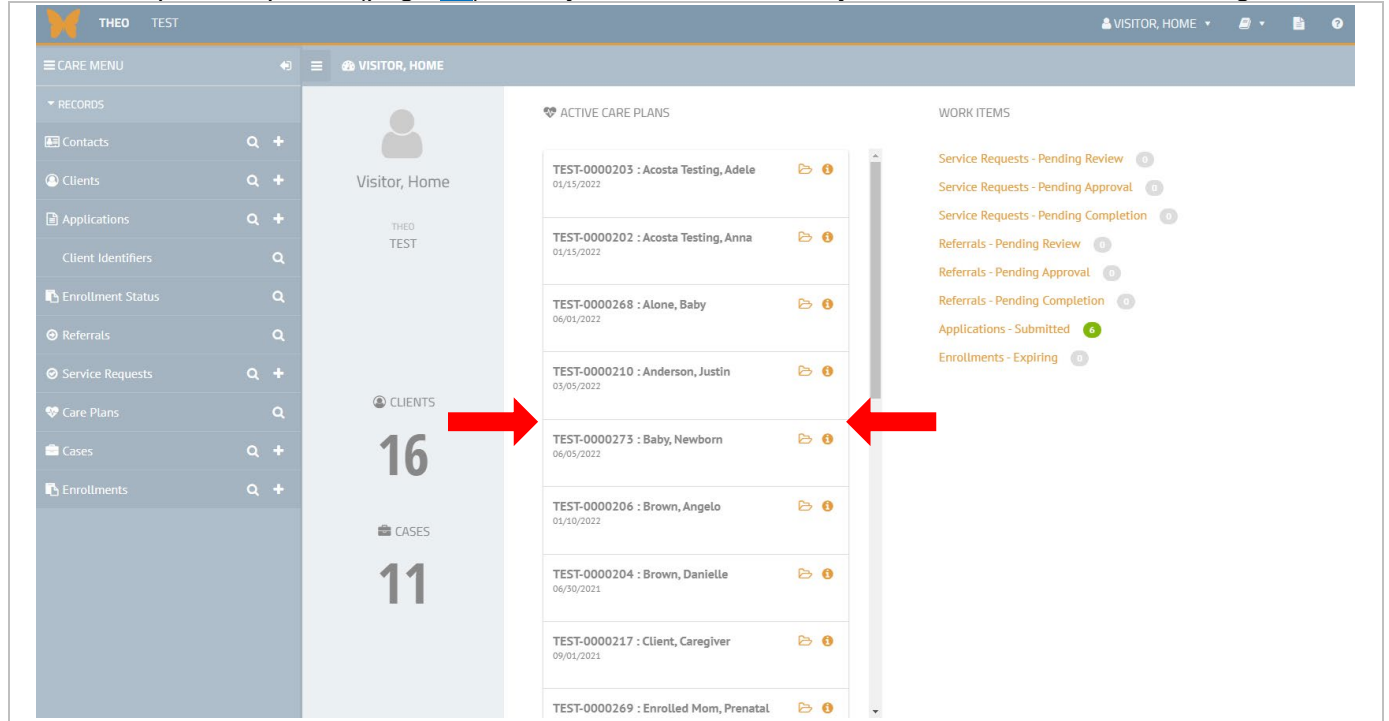
Figure 6: Disenrolled clients disappear from the home visitor's list of Active Care Plans

5.0 Error Messages and Fixing Data Entry

5.1 Error messages

Error messages occur when data is missing from required fields or when data is entered incorrectly. These types of errors are usually easy to fix.

Error message below a required field
Required fields that do not have data entered in them will stop THEO from being able to save. (Note: A required field has an orange border on the left side of the field.) THEO will display an error message below the required field to describe what is wrong.

Fields with an orange border on the left side require data entry.
- Birth Date and Gender fields do not have data entered in them (Figure 1).
- THEO will not save if you click on the orange Save & Open button.

Figure 1: THEO will not save this record until all required fields have data entered in them

The record for the New Client does not save.
- Orange error messages appear below Birth Date and Gender fields: "The Birth Date field is required" and "The Gender field is required".
- Another error message appears along the bottom of the New Client screen: "Unable to submit. Please check form for errors" (Figure 2).

Figure 2: Error messages when required fields have no entry

Enter data in the required fields and then click on the orange Save & Open button (Figure 3).

Figure 3: Required fields with data entered in them

THEO saves your data entry on the survey and closes the window (Figure 4).
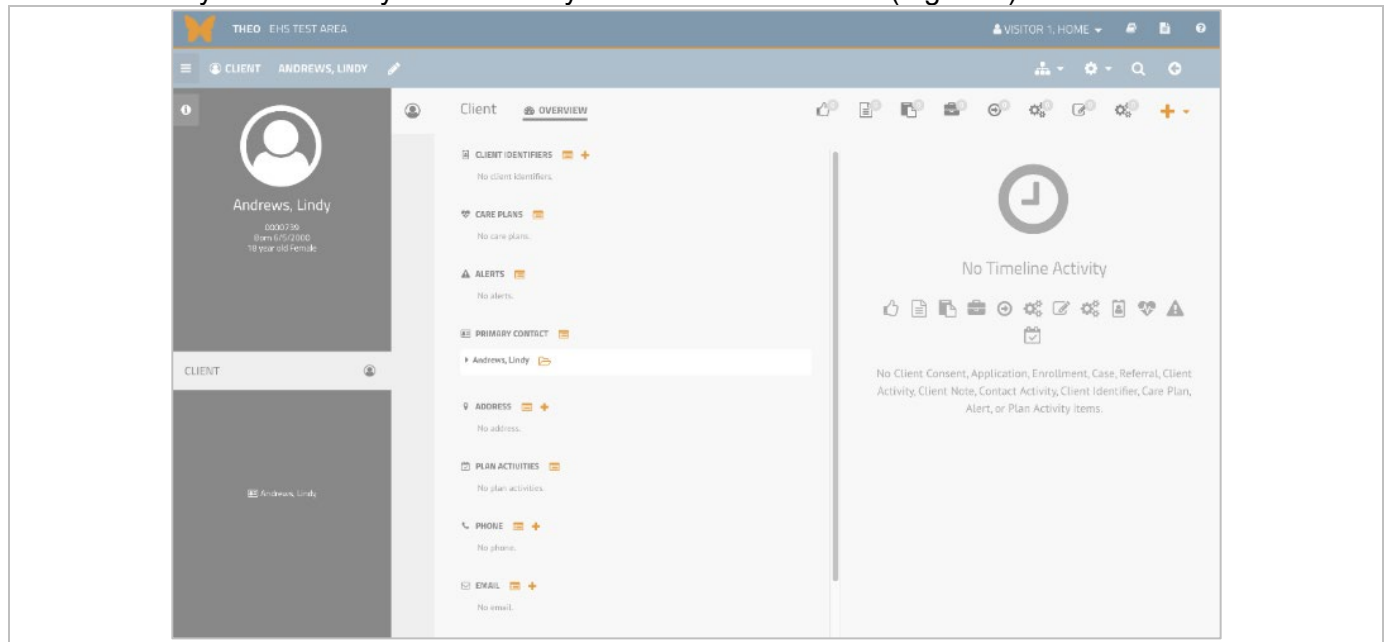
Figure 4: Record saved

If you see error messages that you do not understand or you are stopped from being able to save your data, please contact THEO App Support, theo.support@dhsoha.state.or.us.

Common error message related to a date

THEO checks the logic of certain dates when you try to save them and will stop your save if the date is illogical in some way. Below is an example of a common error message related to the field that collects the client's date of birth.

1. The New Client screen includes the field Birth Date for each client (Figure 1).
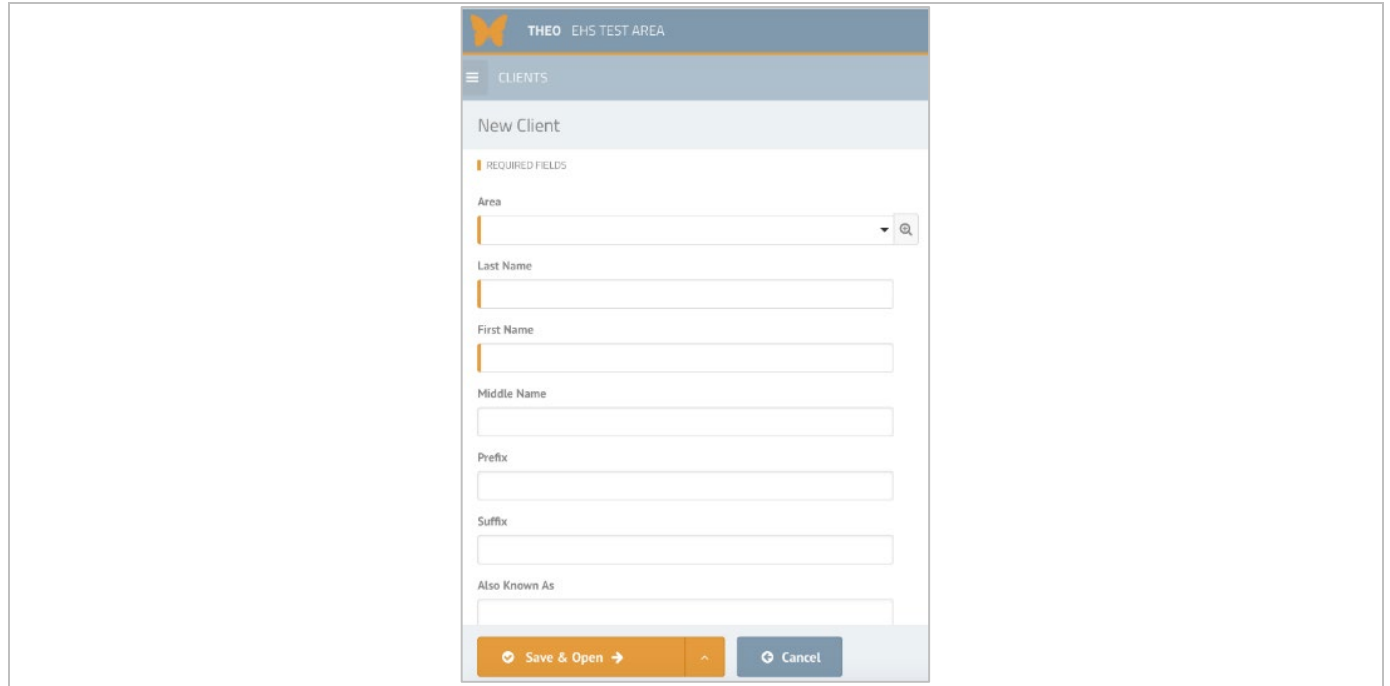
Figure 1: New Client screen

- THEO will stop you from saving a birth date that is in the future (after today). If you enter a future birth date and try to save, you will see an error message (Figure 3) and the Client record will not save.
- Entering a date in the Birth Date field that is for today or a date that occurred before today will make the error message disappear.
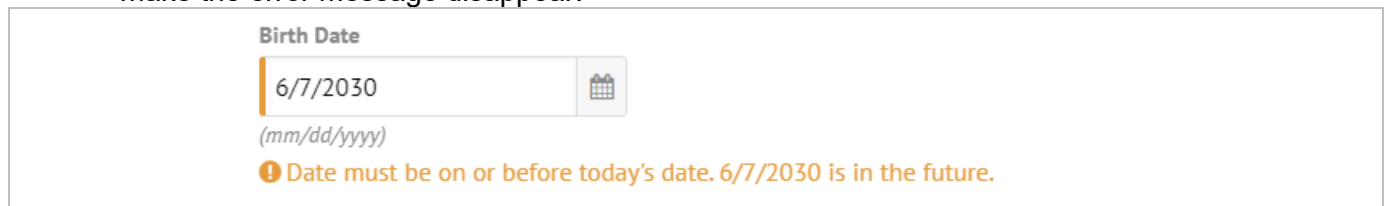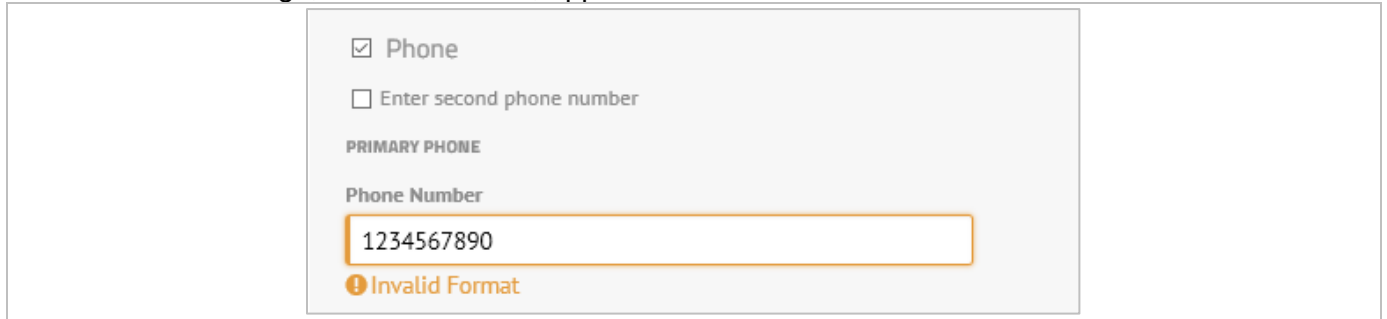
Figure 3: Birth Date field – Error message about future dates

Invalid format error message

The Phone Number field requires 10 digits in a specific format: either ###-###-#### or (###) ###-#### (Figure 4).
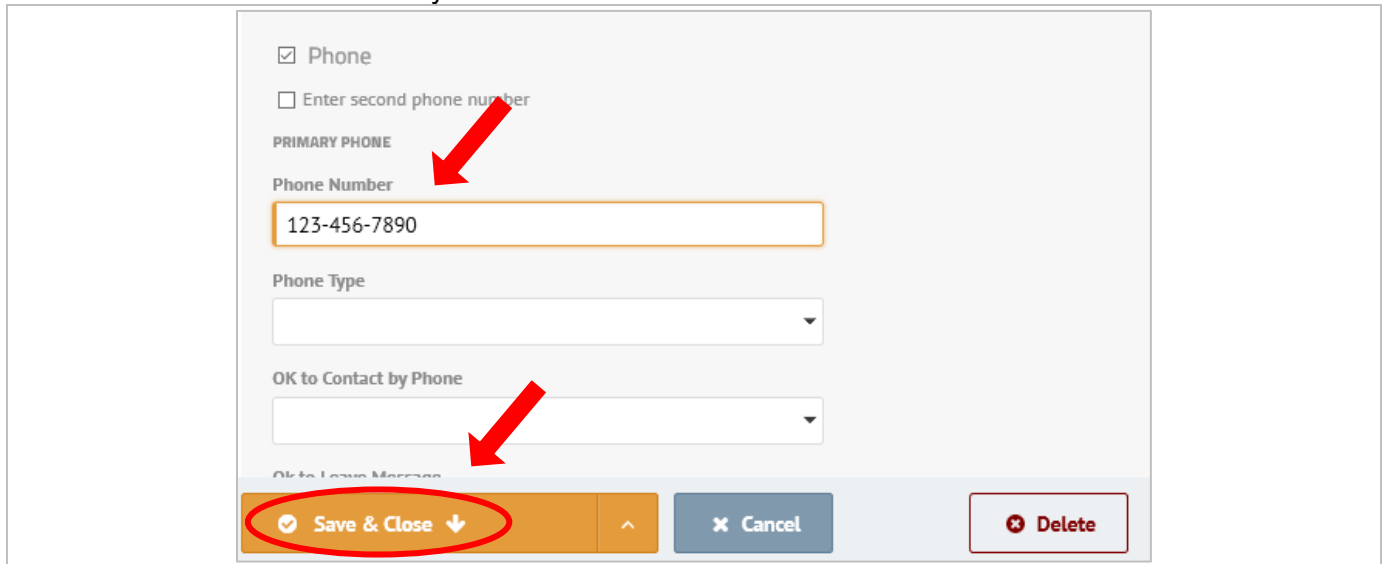
- Trying to save 10 digits without one of the required formats causes THEO to display an error message and stop the save.
- Error message, "Invalid Format", appears below the Phone Number field.

Figure 4: Phone Number field – Invalid format error message

- Formatting the 10 digits as ###-###-#### or (###) ###-#### makes the error message disappear (Figure 5).
- THEO will save this entry.

Figure 5: Client screen – Correct phone number format

5.2 Edit a survey

Sometimes you will need to open a survey to edit it. You might have entered partial data on a survey and need to reopen the survey to finish it. Or you may need to correct some data on the survey. THEO will allow you to change the data in one or more fields or delete the entire survey. Follow the steps below to edit a survey.

1. From your THEO dashboard, click on the Find icon to the right of Care Plans on the Care Menu (Figure 1).
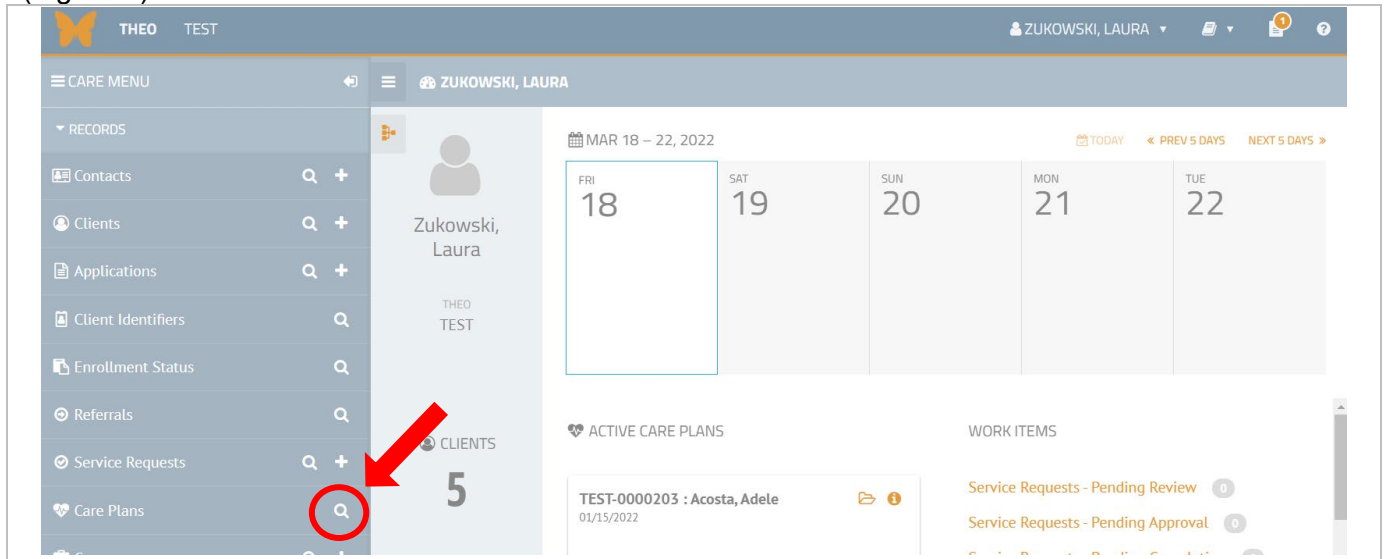

Figure 1: Care Menu – Find Care Plans icon

2. The Search Care Plans screen opens (Figure 2).
   - Enter the name of the client in the Client search field.
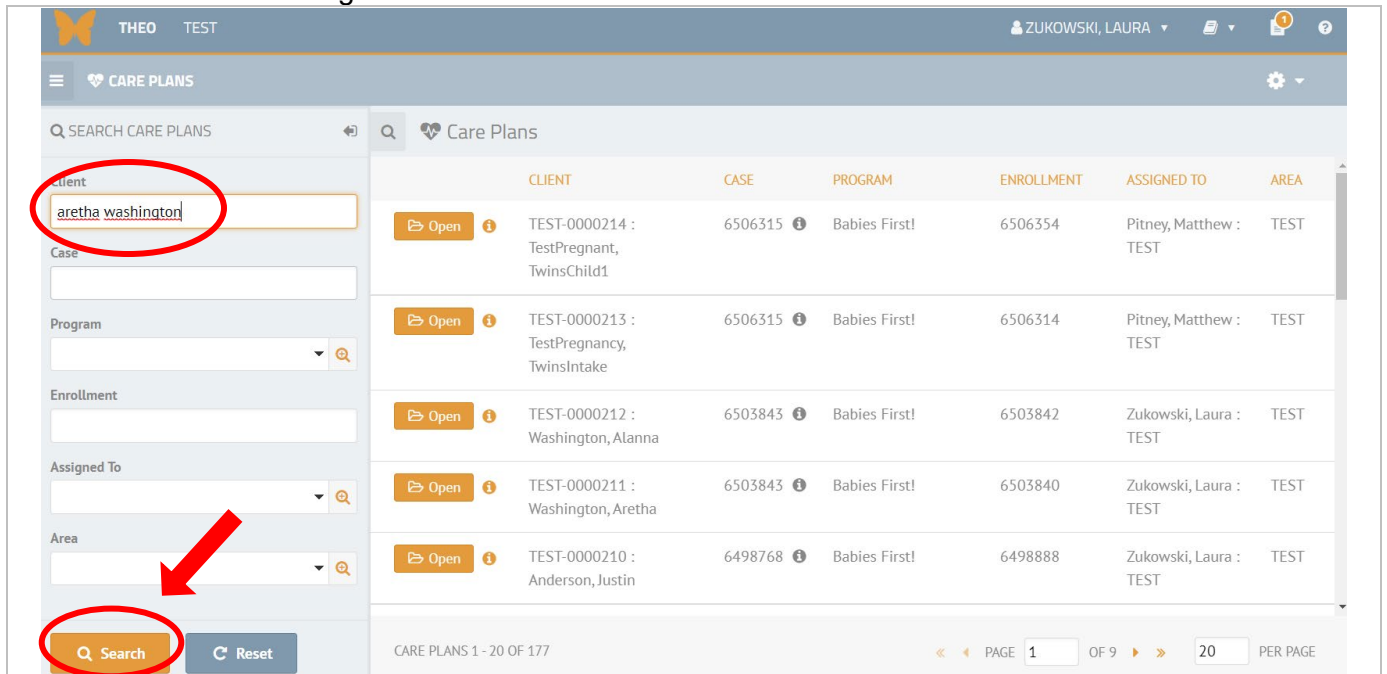   - Click on the orange Search button at the bottom of the screen.

Figure 2: Search Care Plans – Clients search field

3. Care plans for clients that match your search appear in the search results on the right side of the screen (Figure 3).
- Click on the orange Open button to the left of your client's name to open the client's Care Plan.
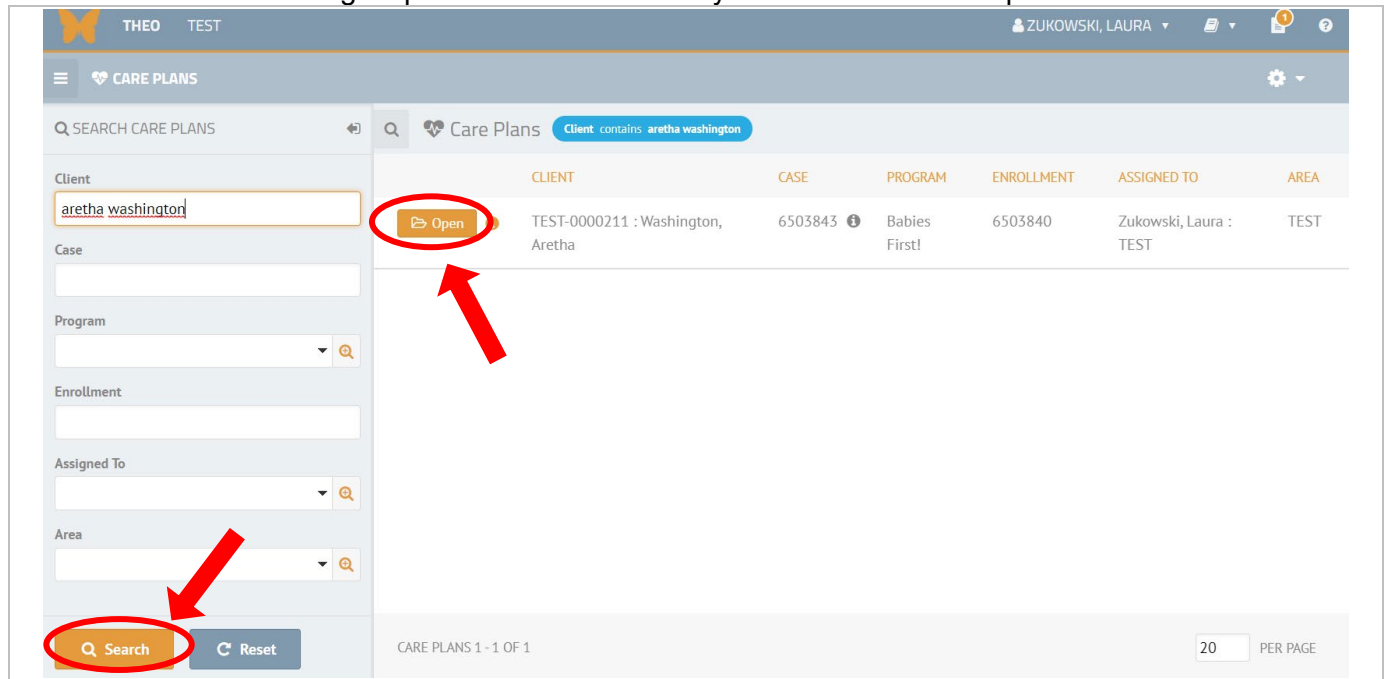

Figure 3: Search Care Plans screen – Open button

4. Client's Care Plan opens (Figure 4).
- Find the survey you need to edit in the client's Activity Timeline.
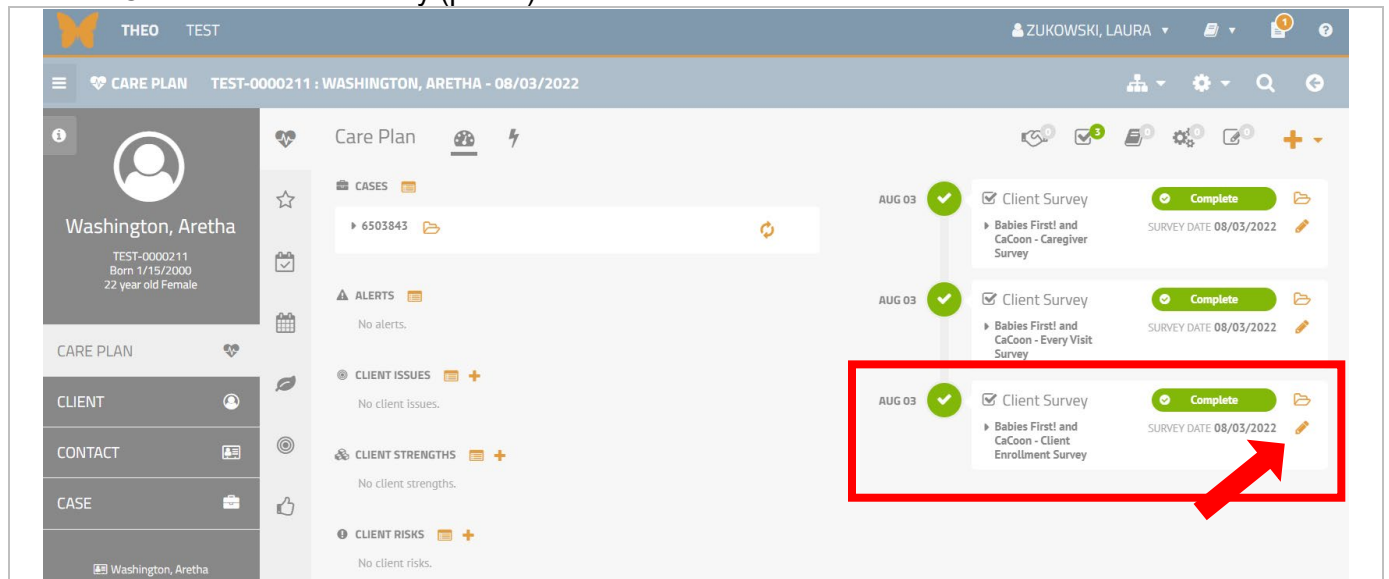- Click on the Edit Survey (pencil) icon

Figure 4: Edit Client Survey (pencil) icon

5. Survey opens (Figure 5).
  - Locate the question to edit, make the changes, and click on the orange Save & Continue button.
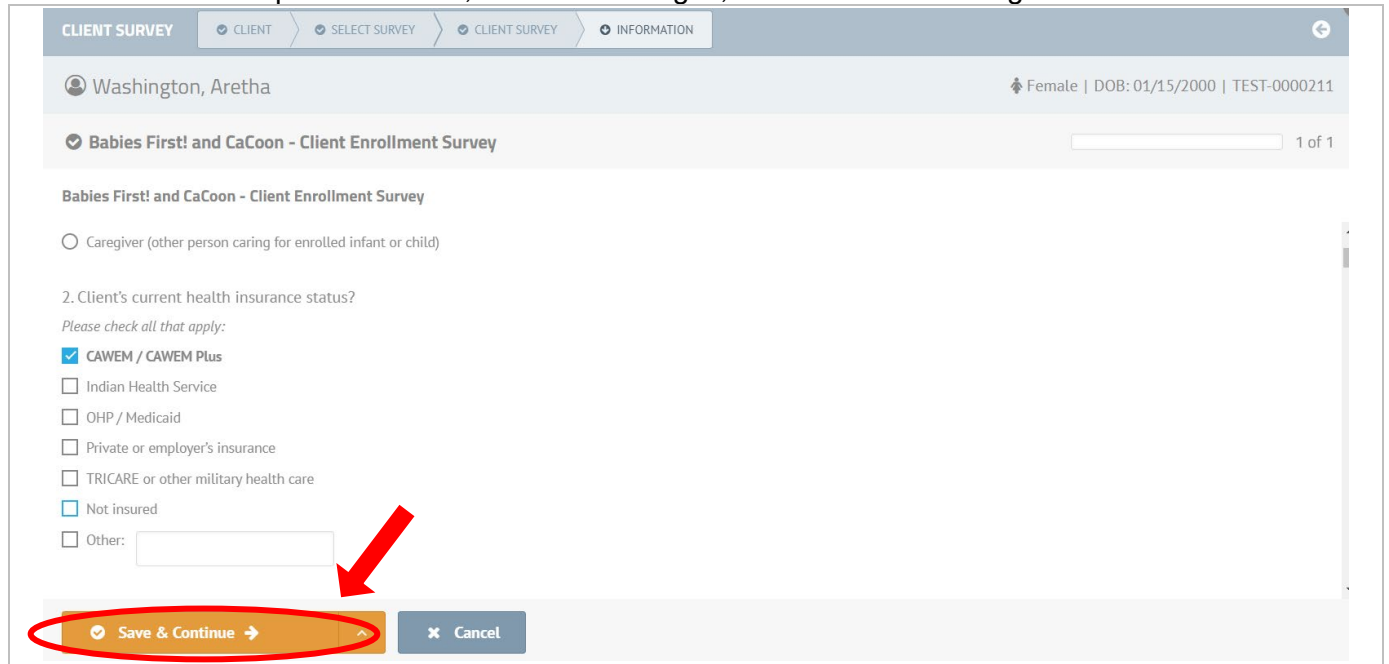

Figure 5: Survey with new edit

6. Survey window closes. You're returned to the client's Care Plan (Figure 6).
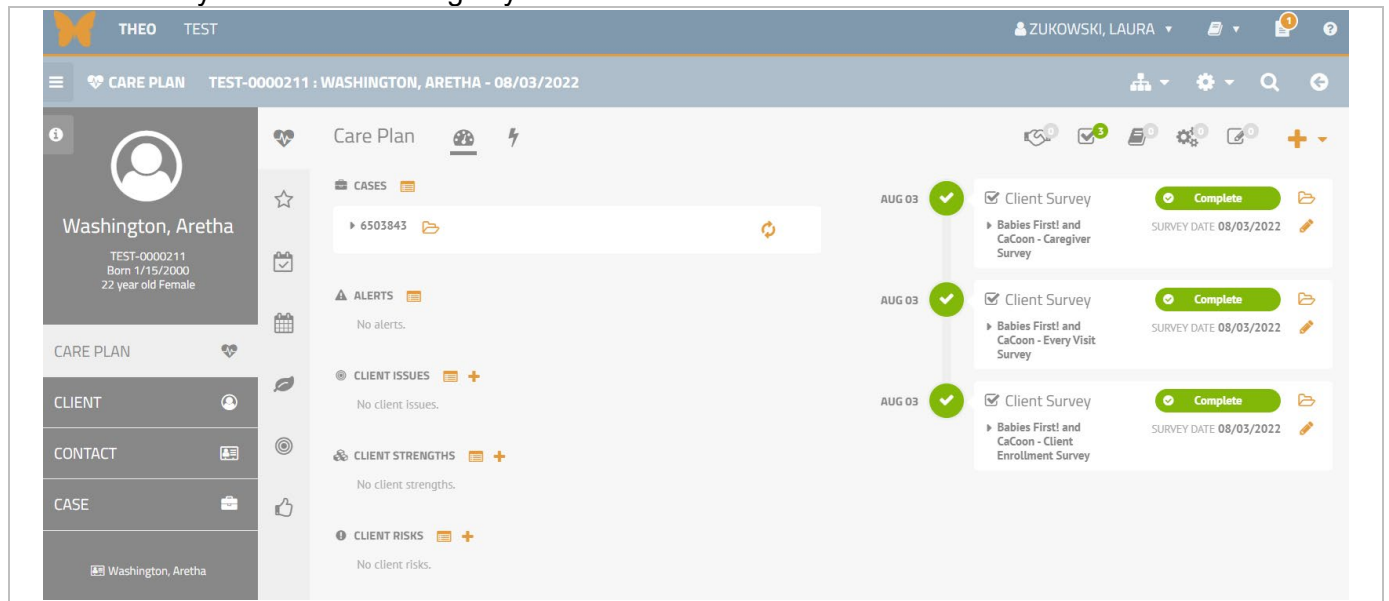 - Survey includes the changes you saved.

Figure 6: Client Survey in the Activity Timeline

Note: If you need to edit the Survey Date or the Completed By field, click on the step "Client Survey" in the workflow at the top of the window.

- This will open the earlier step and allow you edit the data you entered on that step (Figure 7).

- Click on the orange Save & Continue button and save each window that opens until you reach the end of the survey, and the survey window closes.
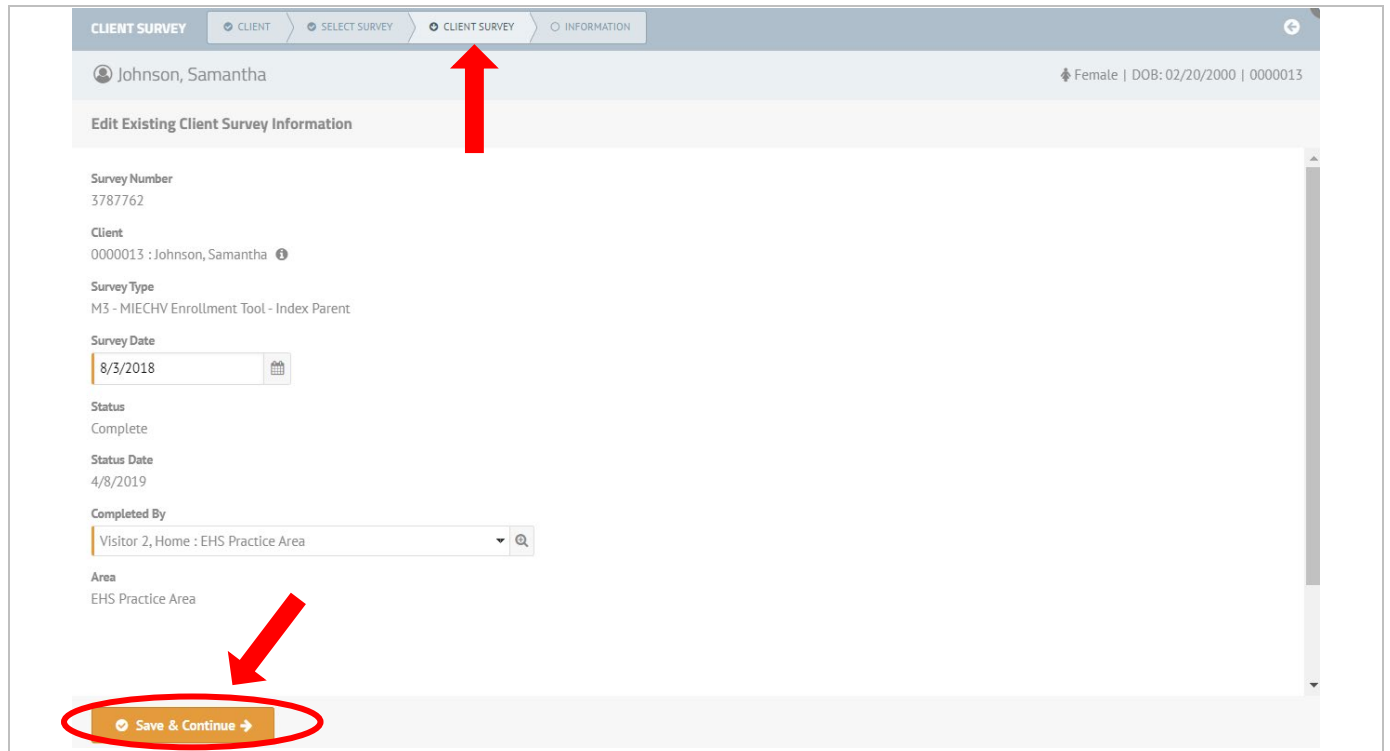
Figure 7: Client Survey summary screen

5.3 Delete a survey

THEO allows you to delete a survey when you have entered it in error. Follow the steps below to delete a survey from a client's Care Plan.

From your THEO dashboard, click on the Find icon to the right of Care Plans on the Care Menu (Figure 1).
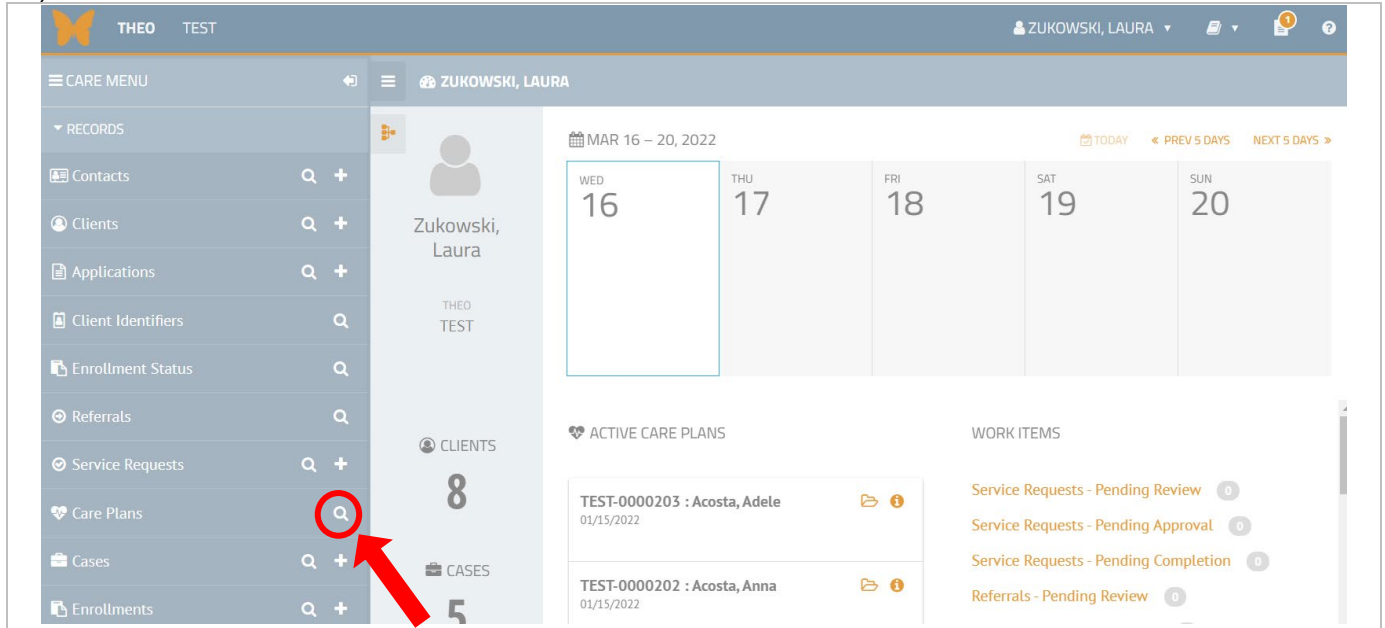

Figure 1: Find Care Plans icon

Search for client's Care Plan
- Enter the client ID, first name and/or last name in the Client search field. Click on the orange Search button in the lower left (Figure 2).
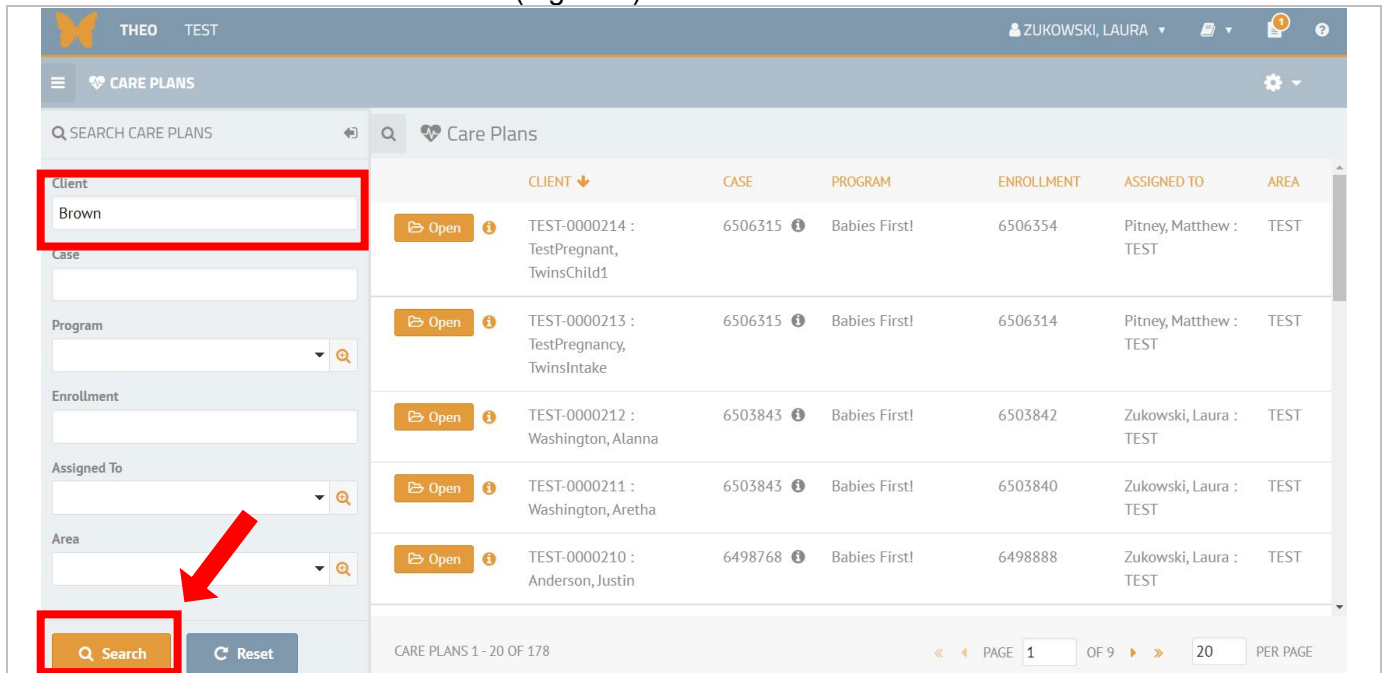

Figure 2: Search for a client's Care Plan

Search results appear on right
- Care plans for any client whose name or ID matches your search fields will appear in the results on the right side of your screen.
- Click on the Open icon to the left of the client's name to open the client's Care Plan (Figure 3).
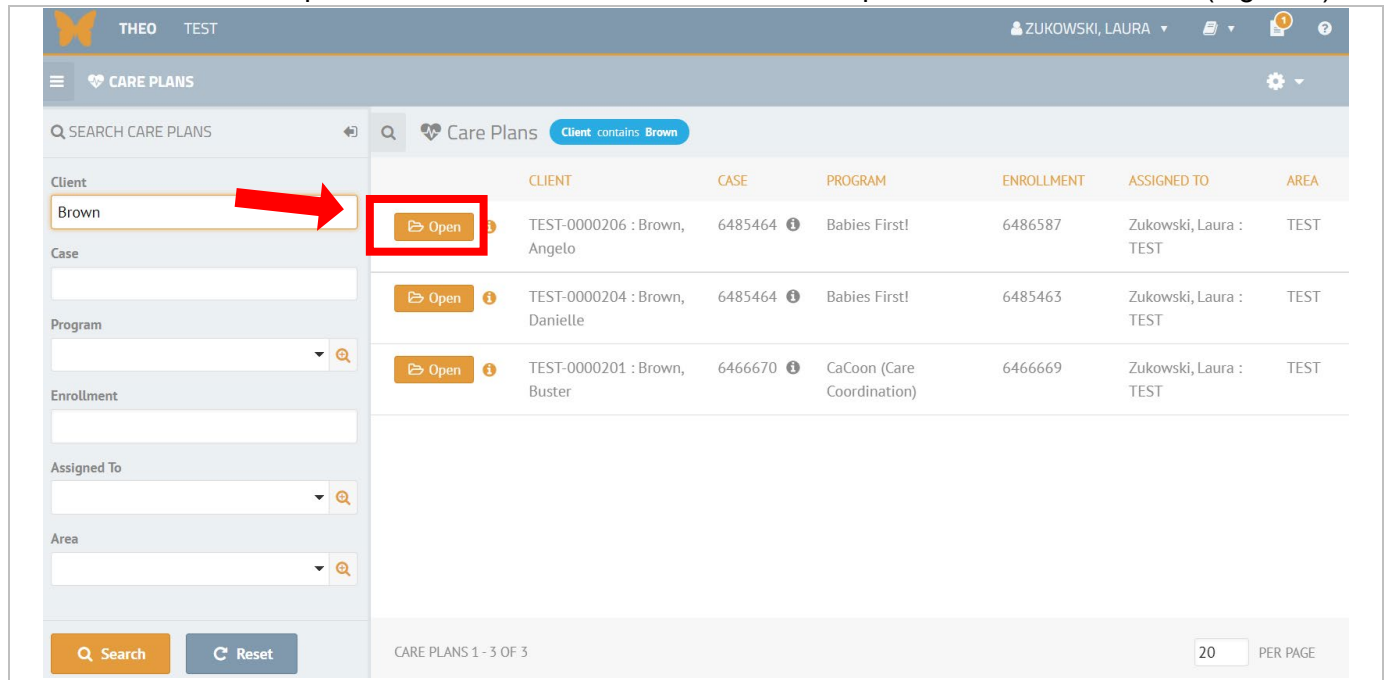

Figure 3: Open a client's Care Plan from the search results

4. Open the survey you want to delete from the client's Care Plan

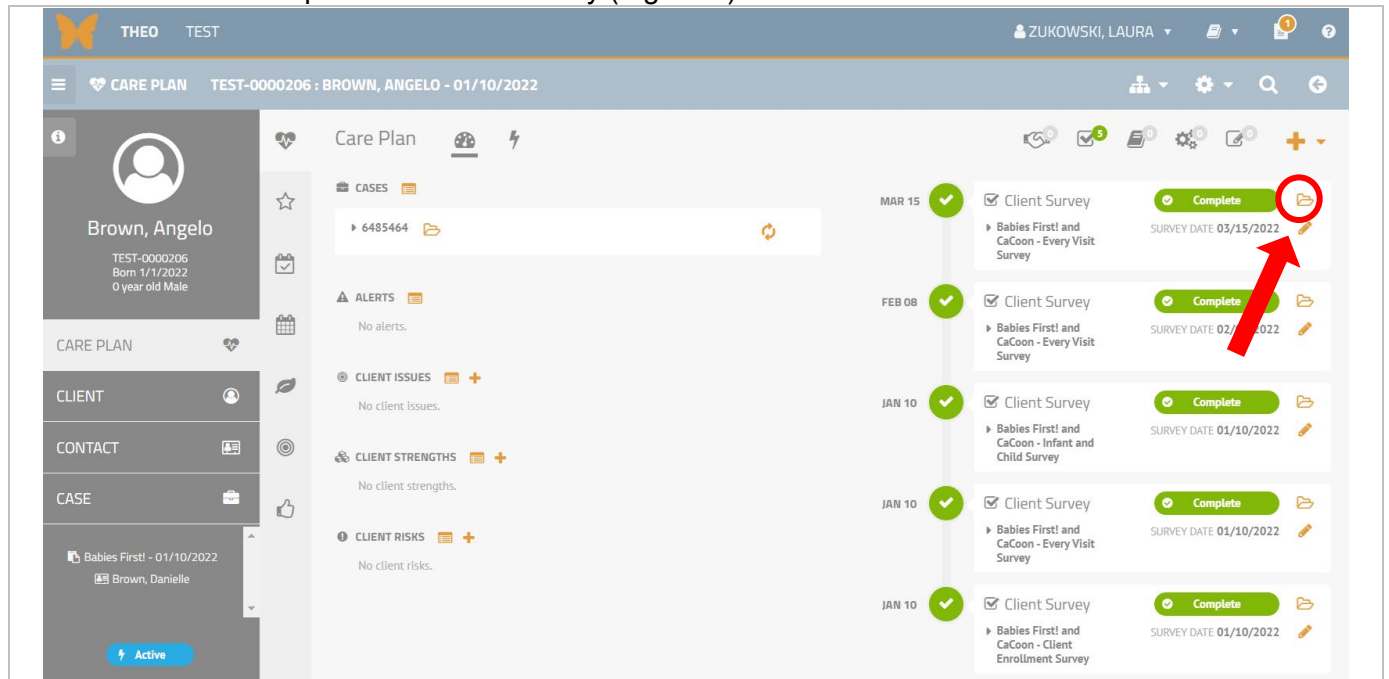- Click on the Open icon for the survey (Figure 4).

Figure 4: Open survey from the timeline on the client's Care Plan

5. Select Delete Client Survey from the Actions menu (gear icon)
   - Mouse over the Gear/Daisy icon. Actions menu opens.
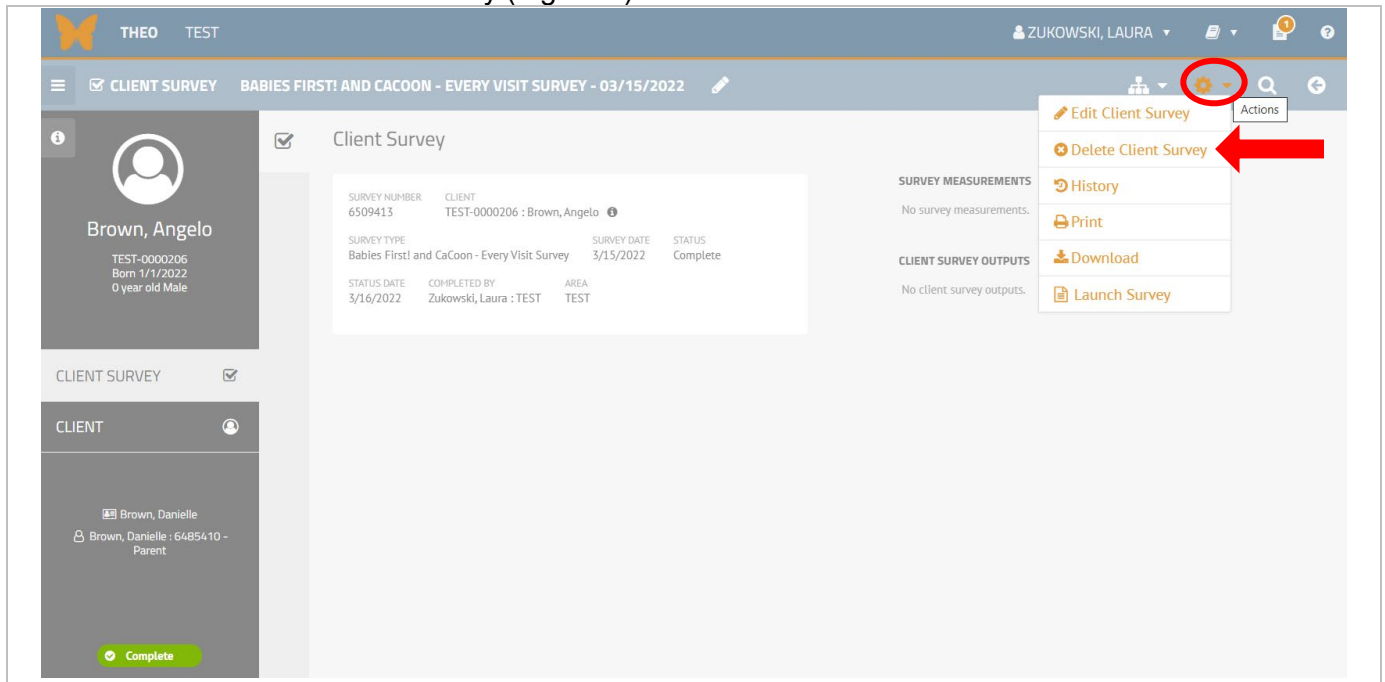   - Click on Delete Client Survey (Figure 5).

Figure 5: Select Delete Client Survey on the Actions menu

6. THEO asks you to verify you wish to delete the survey

   - Click on red Delete button to delete the survey. Or click Cancel to close the window without deleting the survey (Figure 6).
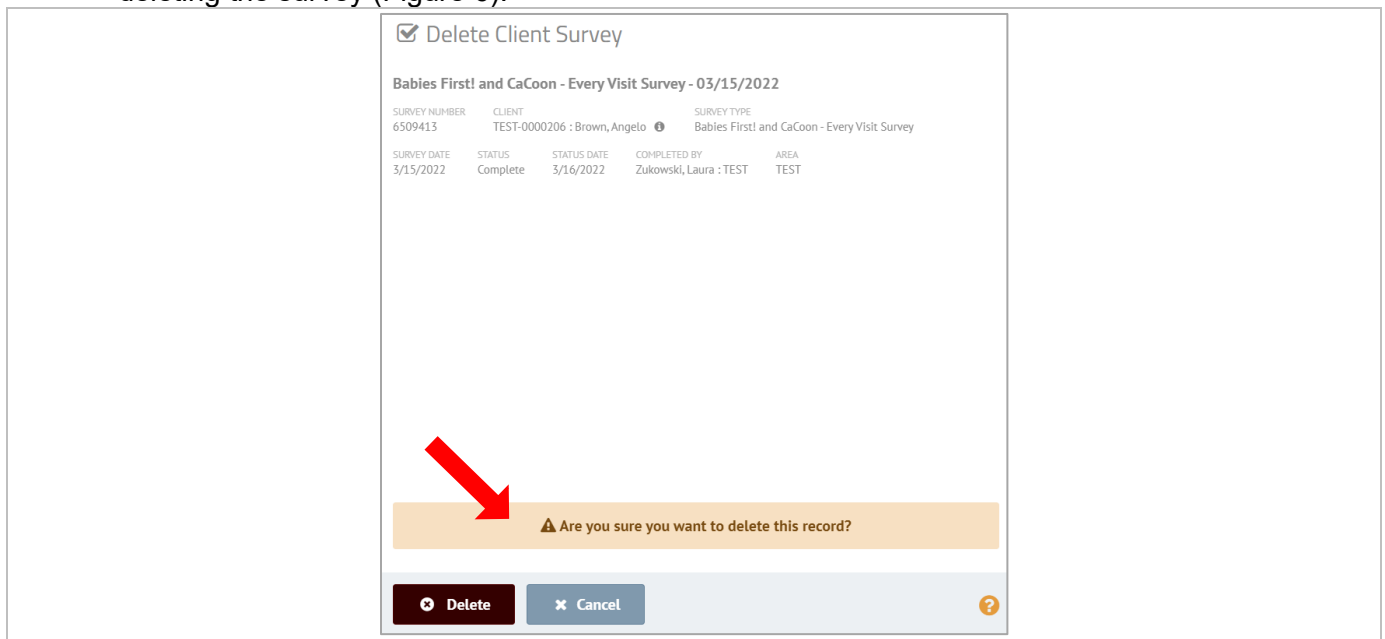

Figure 6: Verify you wish to delete the survey by clicking the Delete button

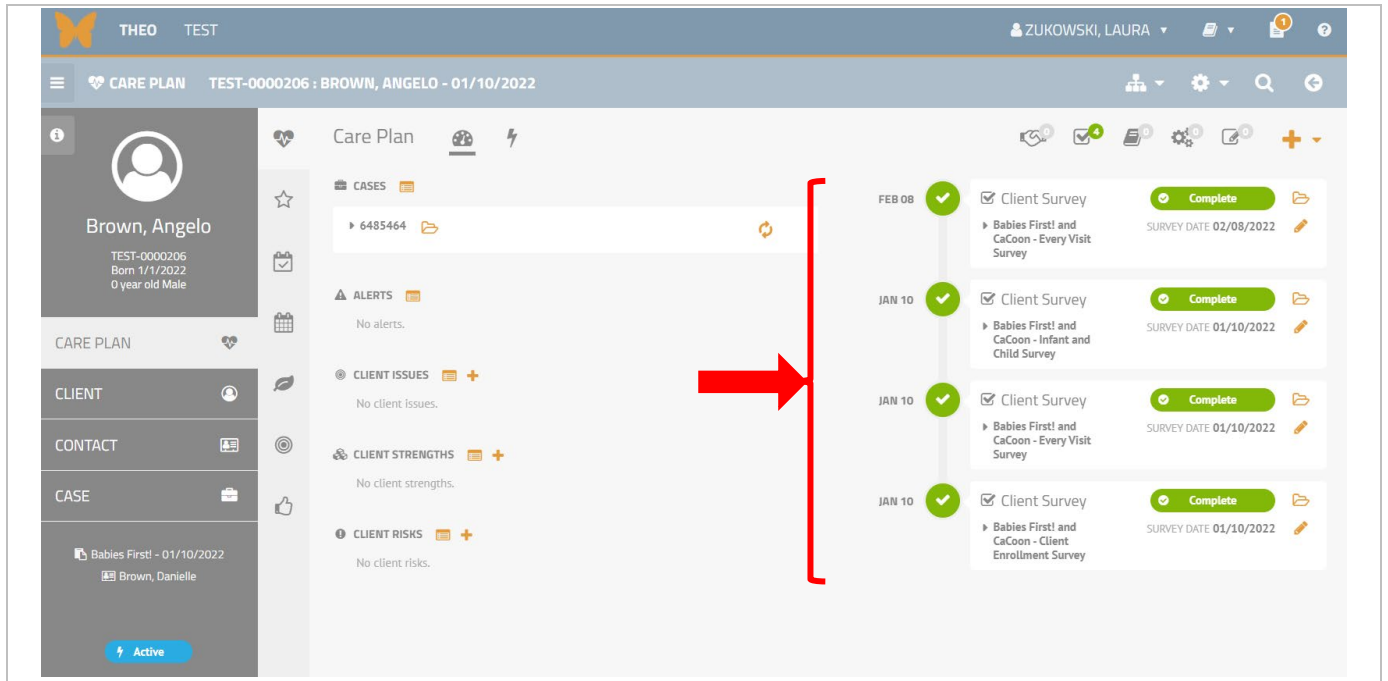7. Survey deletes and no longer appears in client's timeline (Figure 7).

Figure 7: Survey with survey date 3/15/2022 has been deleted from the client's timeline

6.0 Data Reporting

This section describes how to search for data records, sort search results, and save or print data files to use for reporting.

Tips for using the list views to work with data

- Every list view has a search panel on the left side of the screen. Search fields on the panel allow you to search the database for records.

- Remember to click the grey **Reset** button after each search to clear out the search fields.

- Some search fields for dates include two fields, so that you can find records for a single date or records for a time period.

- Searchable list views in THEO (and Search Fields):

    o **Contacts** (Last Name, First Name, Also Known As, Birth Date, Gender, Primary Spoken Language, Site Client ID, Medicaid (OHP) Number, Person)

    o **Clients** (Client ID, Area, Last Name, First Name, Also Known As, Birth Date, Gender, Primary Spoken Language, Site Client ID, Medicaid (OHP) Number, Person)

    o **Applications** (Application Status, Applicant, Program, Created On (date range), Submitted On (date range), Application Priority (priority range), Assigned To, Created On (date range)

    o **Client Identifiers** (Identifier, Type, Birth Date, Enrolled, Case, Assigned To, City, State, Zip Code)

    o **Enrollment Status** (Client ID, Program ID, Area, Currently Enrolled, Start Date (date range), End Date (date range), Screening Result, Screening ID, Screening Date (date range), Application ID)

    o **Care Plans** (Client, Case, Program, Assigned To, Area)

    o **Cases** (Case, Primary Client, Client, Active Clients (number range), Visit Frequency (number range), Assigned to, Area)

    o **Enrollments** (Enrollment, Client, Area, Enrollment Index, Program, Start date (date range), End Date (date range), Gender, Birth Date, Local Client ID, Medicaid (OHP) Number

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6.1 Search for data using search filters

From your THEO dashboard, click on the Find icon to the right of Enrollments (Figure 1).
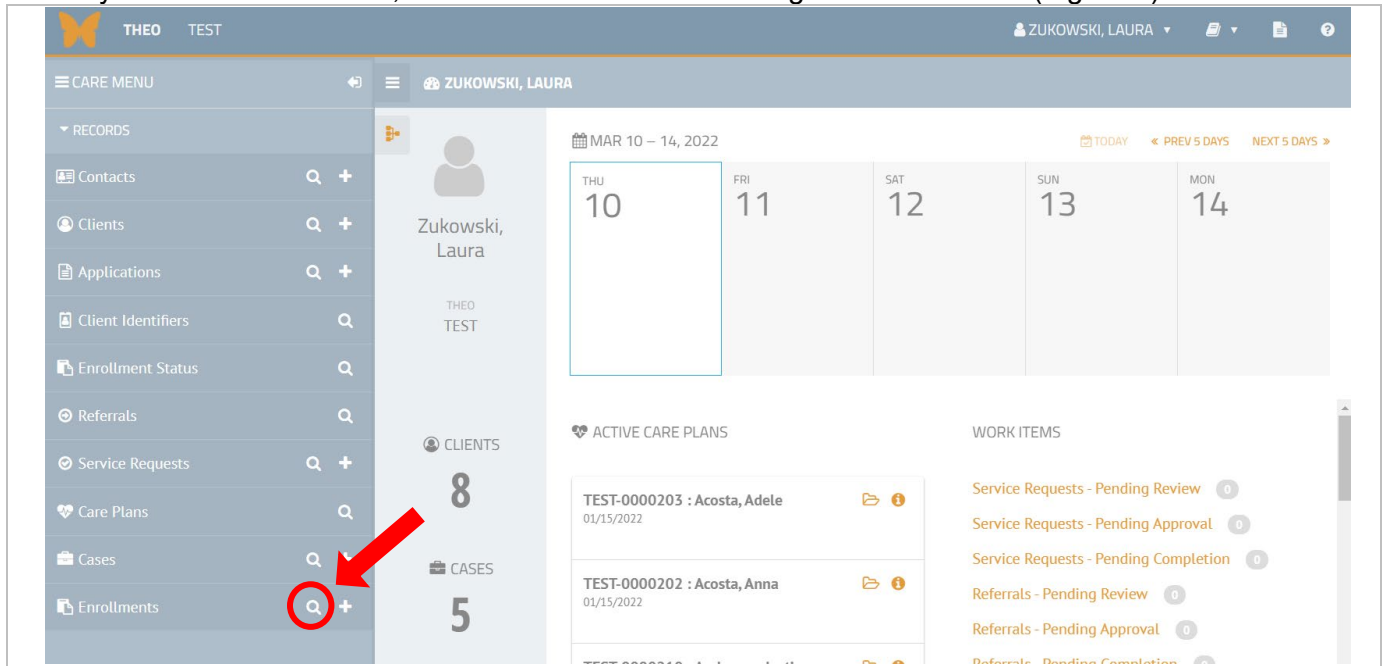

Figure 1: THEO dashboard – Care Menu

Enrollments Search screen opens. A panel with search fields appears on the left side of your screen (Figure 2).
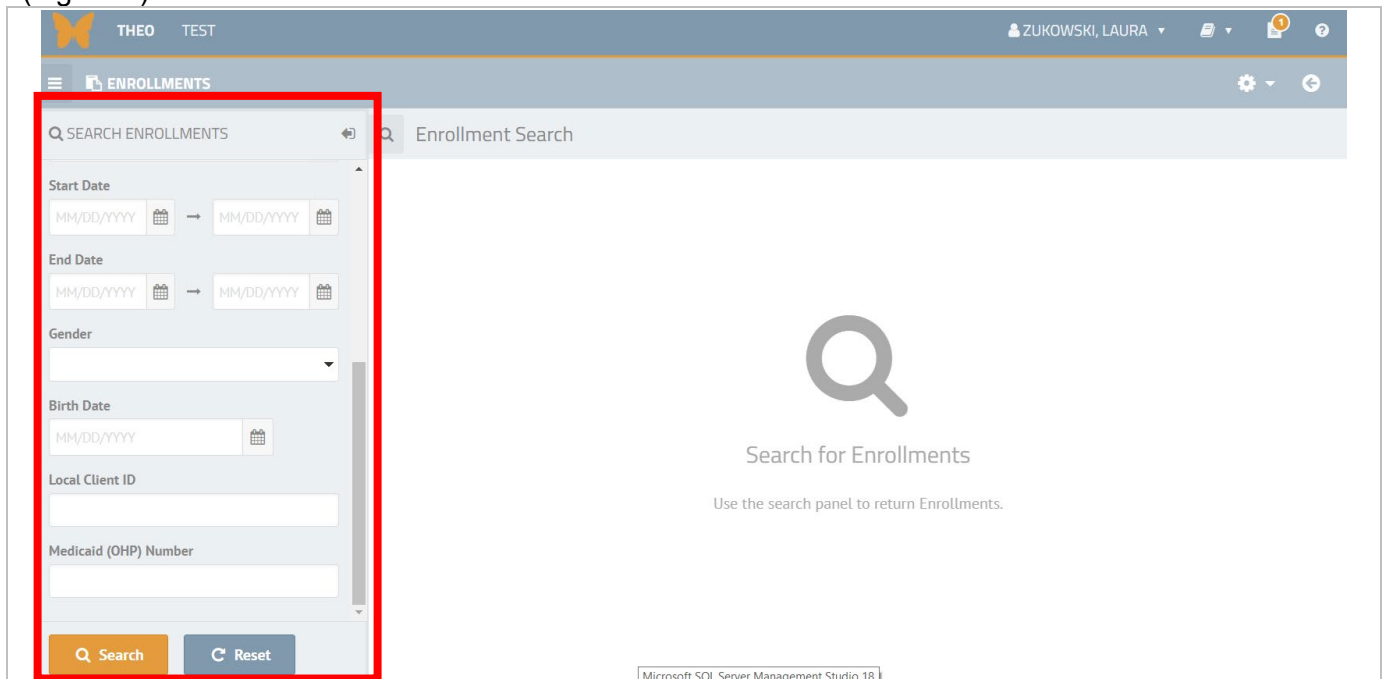

Figure 2: Enrollments Search screen – Search panel with data filters

3. Do not type anything in the search fields to search for <u>all</u> client enrollment records entered by your program. Click on the orange Search button (Figure 3).
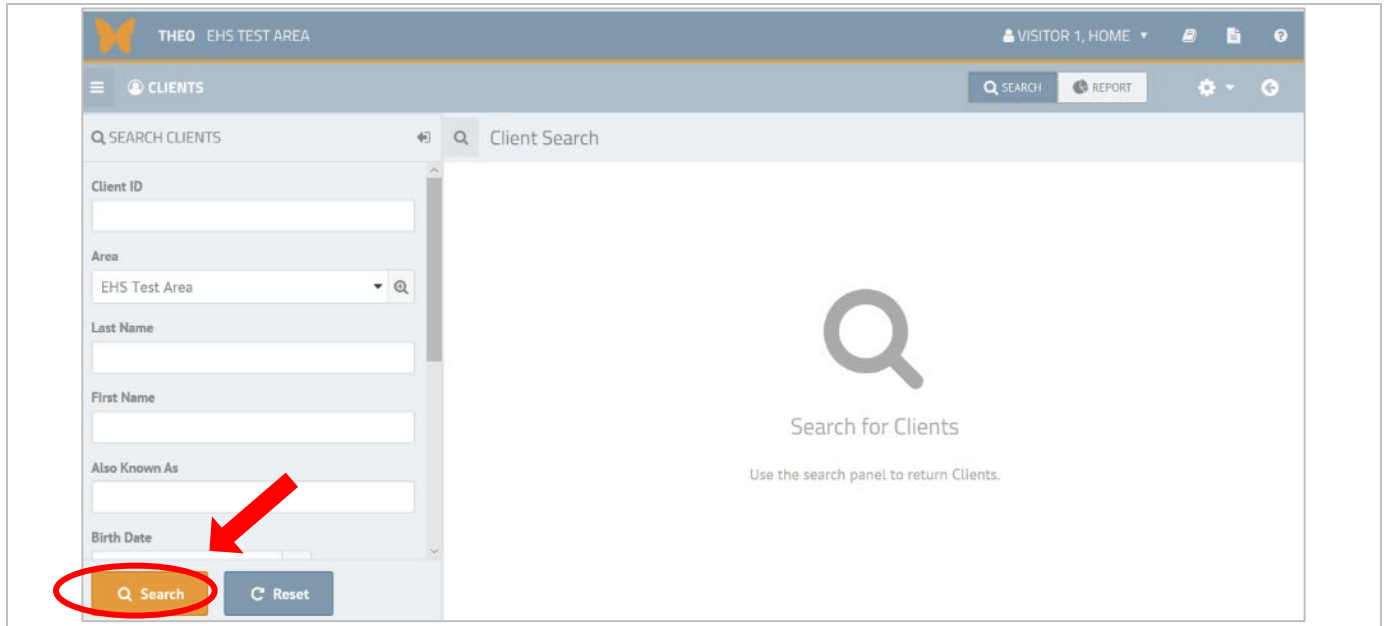
Figure 3: Search Clients – Search button

All enrollment records appear in the search results, on the right side of your screen. The total number of records and pages in your results appear in the bottom right, along with the number of enrollments per page.
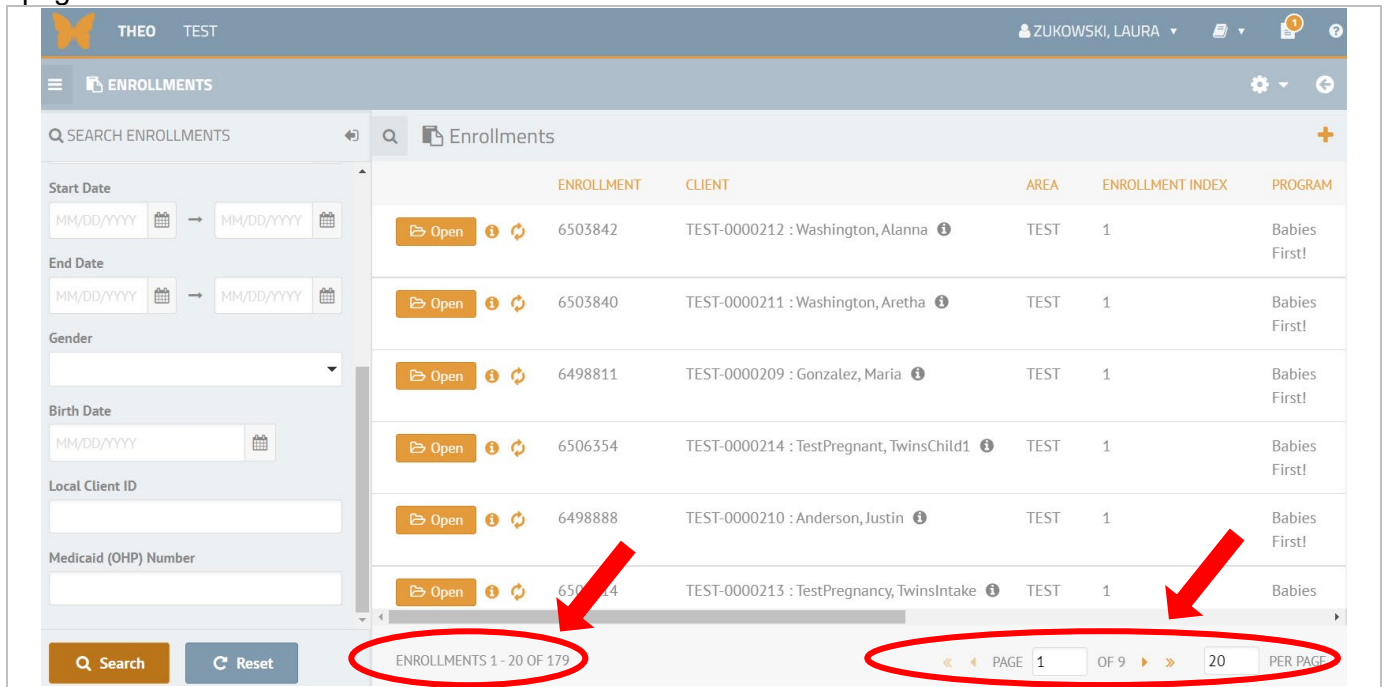
Figure 4: Search results for all enrollments

Change the number of records per page by typing the total number of records in the Per Page field in the lower right corner of window. Click on the orange Search button.

- All 179 enrollments display on one page (Figure 5).
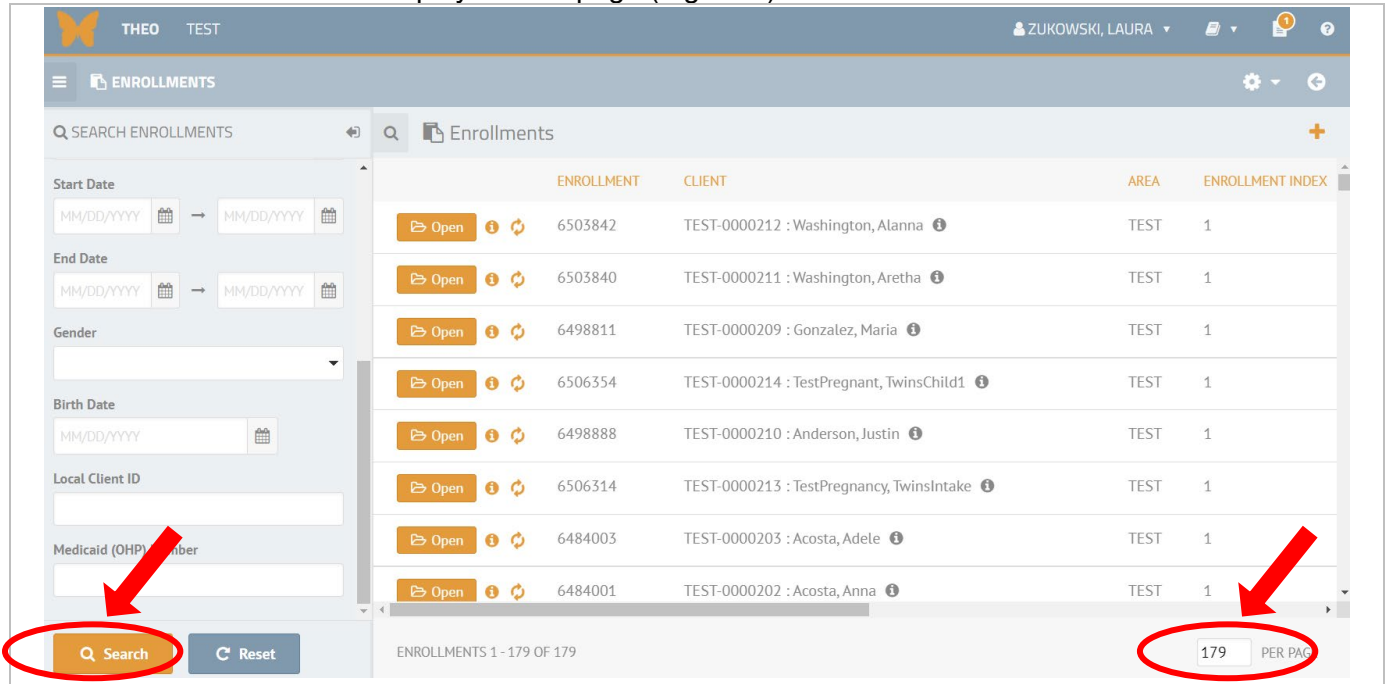
Figure 5: Search Clients - Change the number of records shown on each page

6.2 Filter for more specific records

Search for specific records using the search fields. For example, you could search for all female clients. Or you could search for all female clients who enrolled during 2021.

1. Search for only female clients who enrolled.
   - Click on the Gender field and select "Female" in the drop-down menu.
   - Click on the orange Search button (Figure 1).

Figure 1: Search Clients screen – Search for all Female clients

Results on the right side of your screen show 128 female clients (Figure 2).

Figure 2: Search for all female clients

Search for only female clients who enrolled during 2021.
- Leave Female in the Gender search field. Enter 1/1/2021 and 1/1/2022 in the Start Date fields.
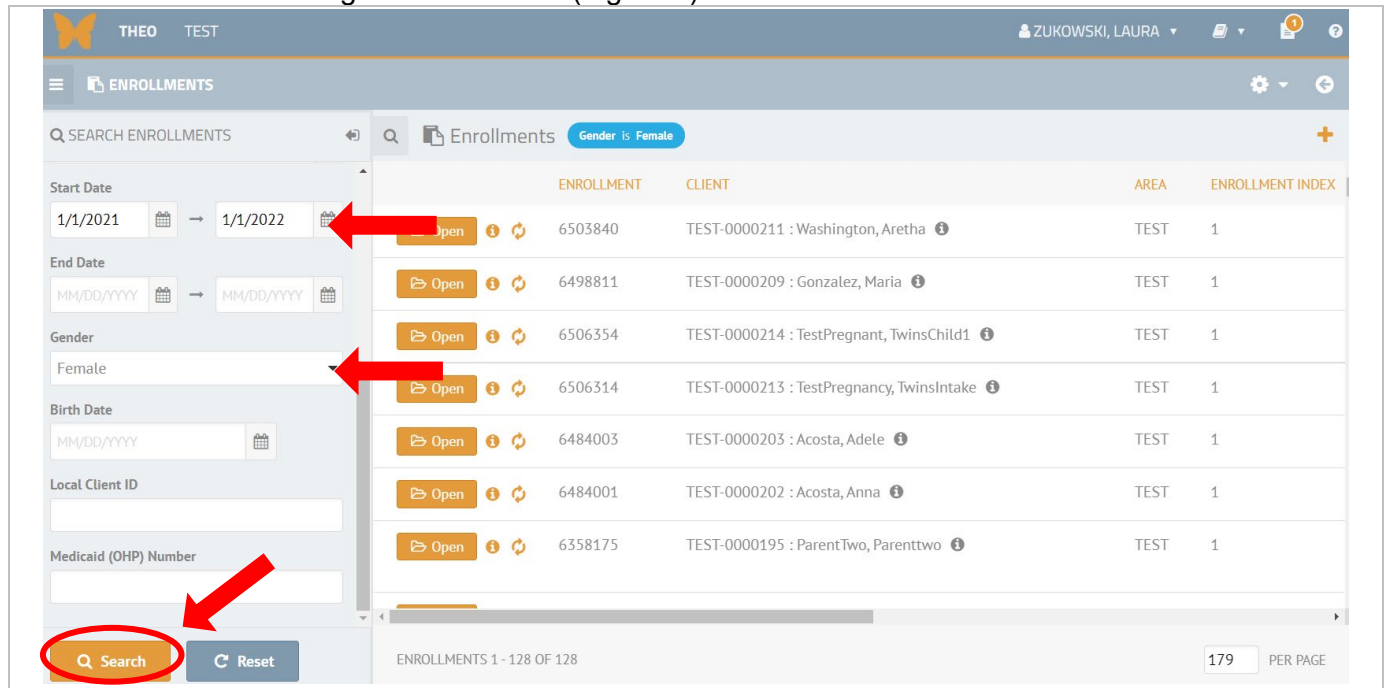- Click on the orange Search button (Figure 3).

Figure 3: Search for female clients who enrolled on any date from 1/1/2021 through 12/31/2021

Search results display on the right side of your screen. All female who enrolled from 1/1/2021 through 12/31/2021 appear in the results. Total number of records is 68 (Figure 4).
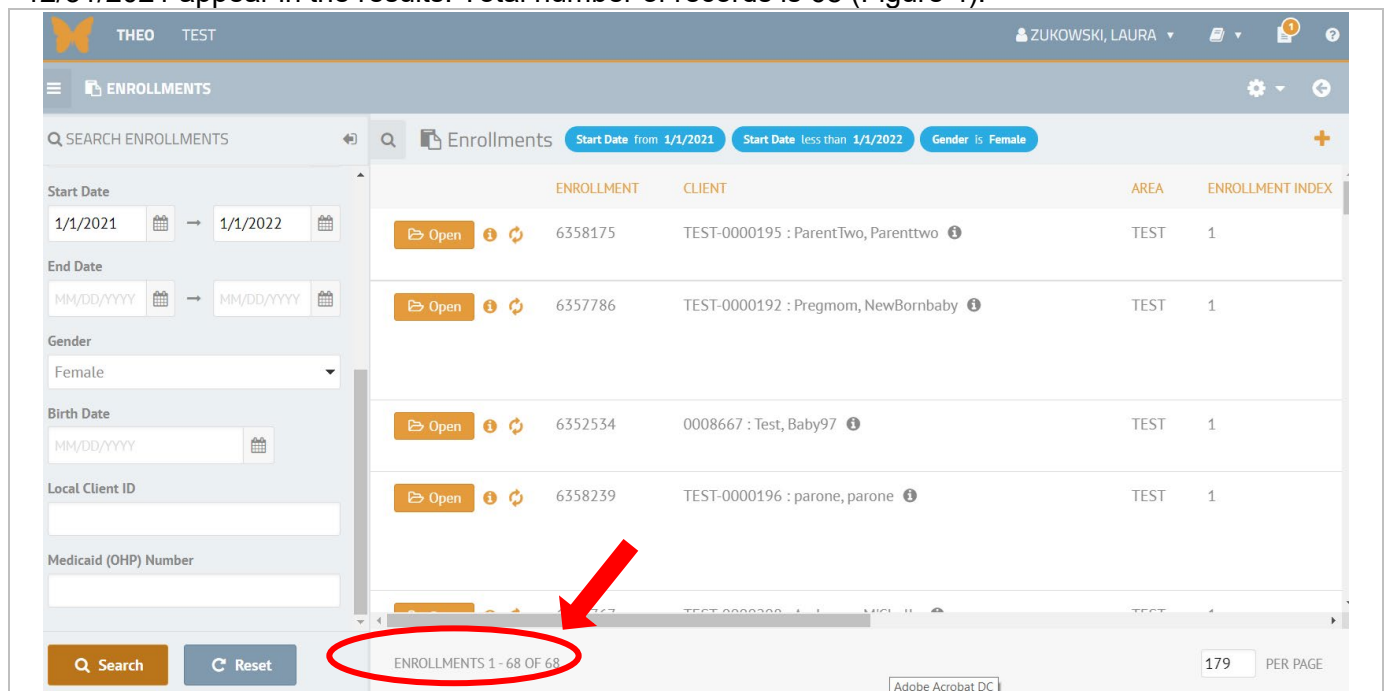

Figure 4: Search results for females who enrolled during 2021
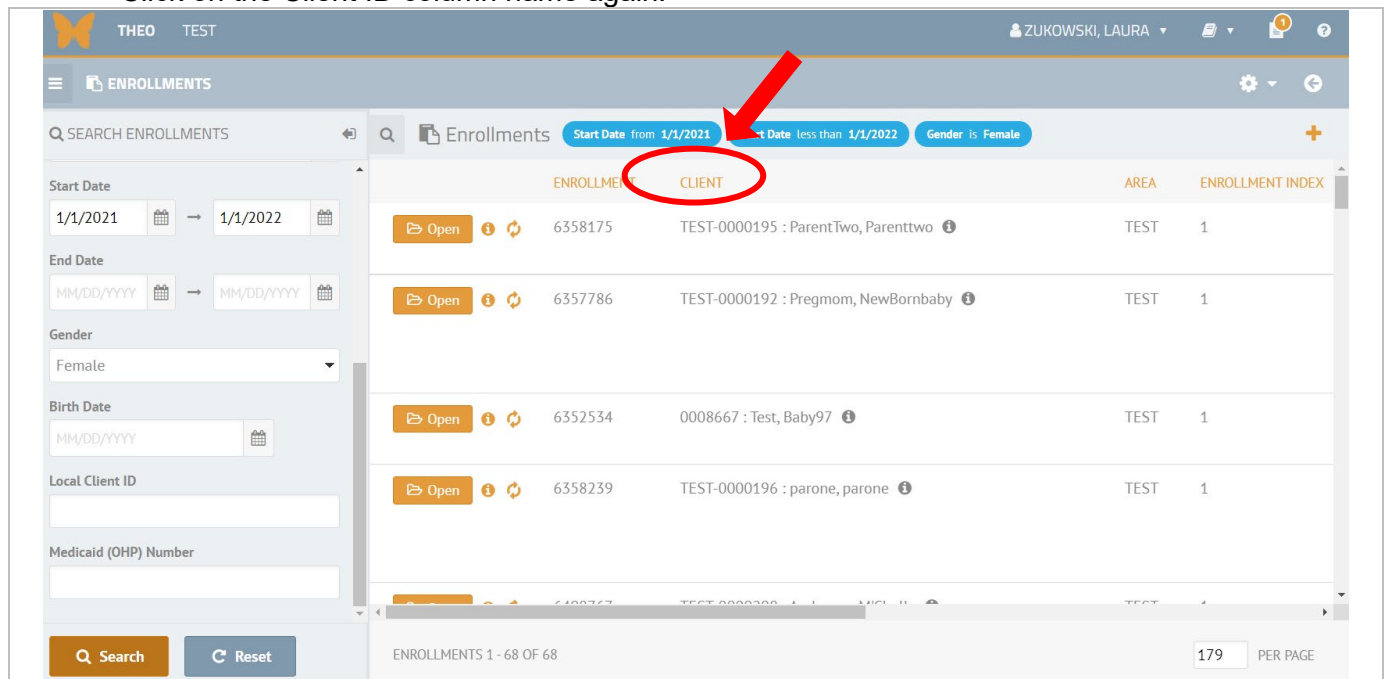
6.3 Sort records

THEO always shows you results that are arranged in a table format with columns and rows.

- Every row in the results is one record.
- Every column is one data field.
- Every column (or data field) in the results has a search field in the search panel.

All columns in the search results are sortable. You can click on any column name to make the records sort in numerical or alphabetical order. Clicking once on a column name will sort records from the lowest to the highest number or from A to Z (depending on whether the data contains numbers and/or letters). Clicking again on the column name will sort the records in the column from highest to lowest number or from Z to A.

Continuing from the screen in the previous section, click on the orange column name "Client" toward the top of your screen (Figure 1).
- The enrollment records sort from lowest to highest Client ID.
- Click on the Client ID column name again.

Figure 1: Sort results by the Client ID

Click again on the orange column name "Client"
- The enrollment records sort from highest to lowest Client ID.

Figure 2: Search Clients results – Records sorted by Client ID, from lowest to highest

6.4 Download results in a data file

After you search and find data, you can save the results in a file. You can also print the results.

Continuing from the previous section, mouse over the orange Actions icon (⚙️) in the upper right of your screen. A drop-down menu opens. Click on Download to select it (Figure 1).
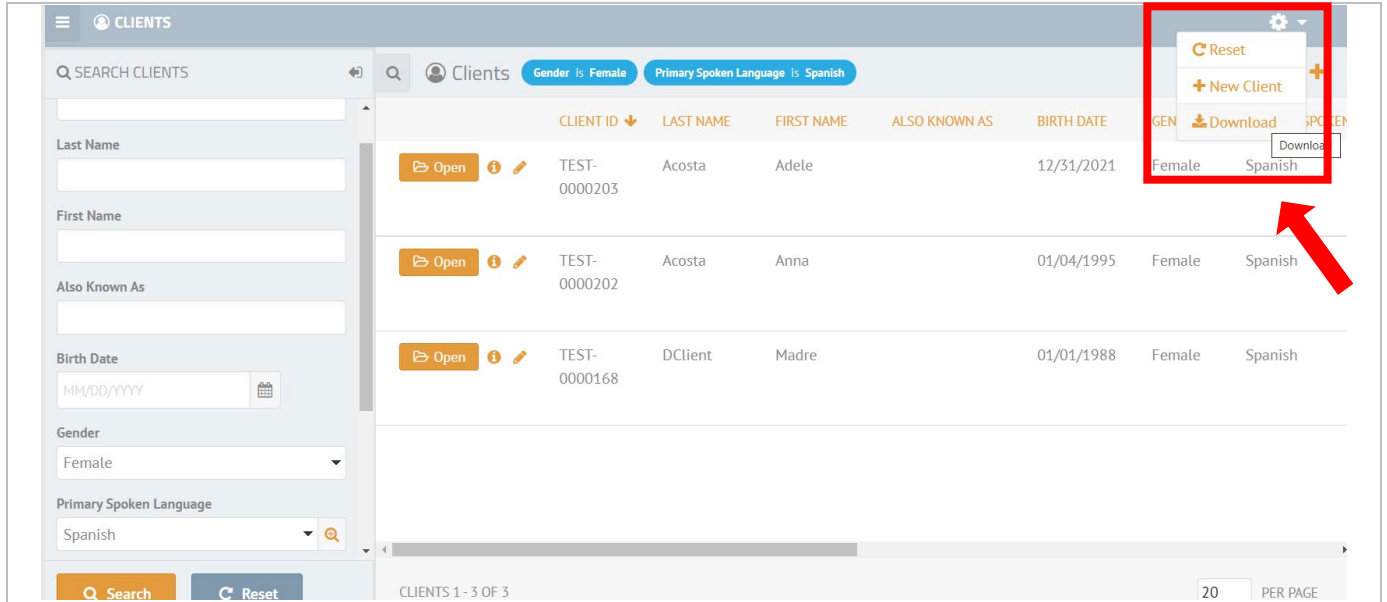

Figure 1: Search Clients screen – Actions icon and drop-down menu

Note: The next set of steps will vary according to the internet browser you are using.
- Browsers vary and may show a message in the lower or upper part of the screen asking if you want to open or save the file.
- Click on Open file or Save As, according to what your browser displays. Continue to save the file to a secure directory that requires a password to access (Figure 2).
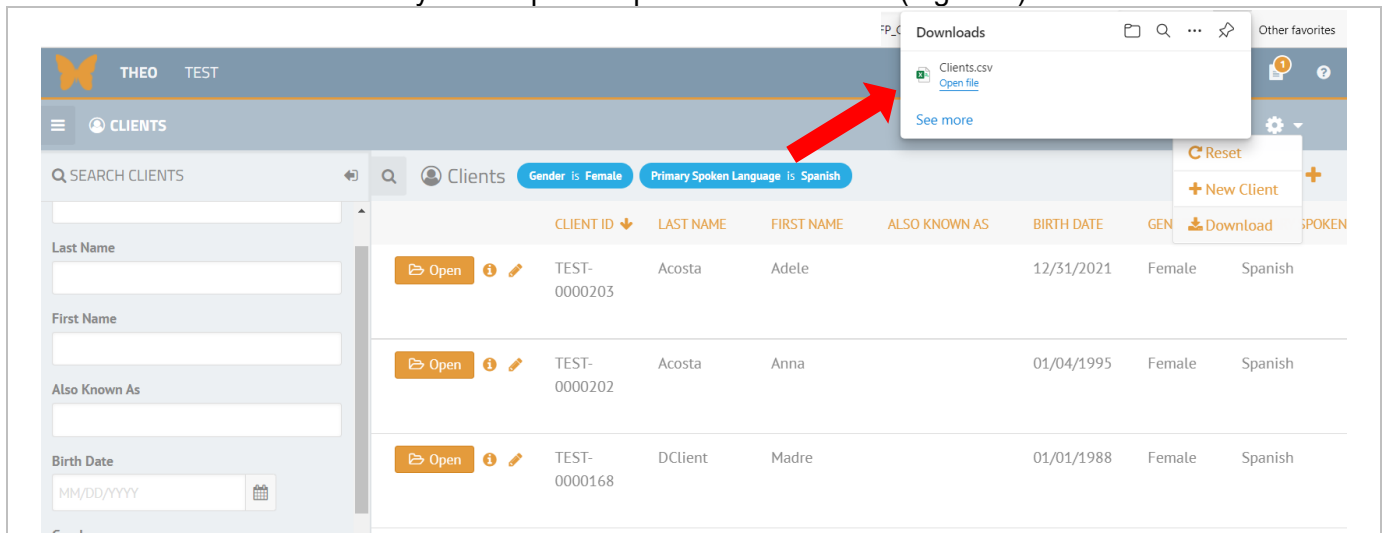

Figure 2: Download message varies by browser

- Data file opens as a .csv file in Microsoft Excel (Figure 3).
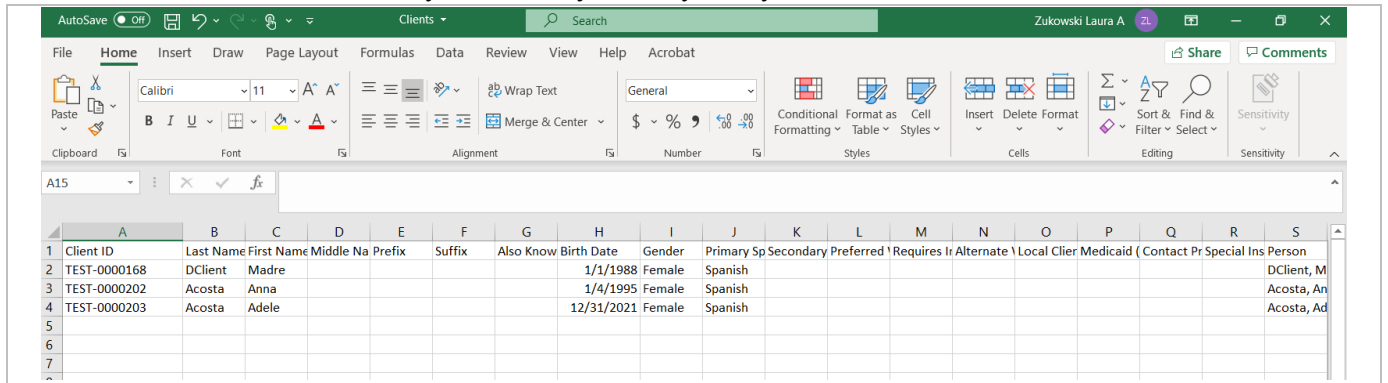- Print or save the file as you normally do on your system.

Figure 3: Data file will open as a .csv file in Microsoft Excel

Note: Larger files take longer to process than smaller files. If there is a wait of over 1 minute, click on the File icon in the top right near your name (Figure 4).
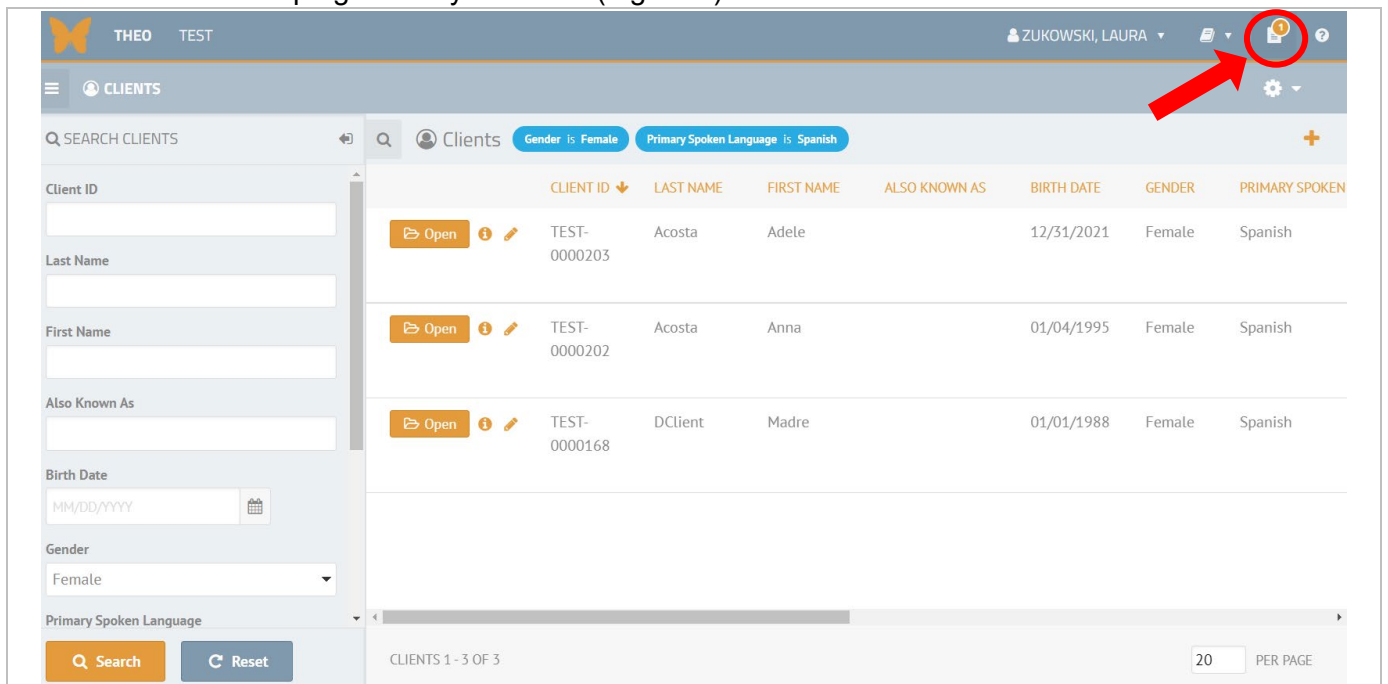

Figure 4: Files icon: Go to file download page

- Files download page opens.
- Your file displays with the date and time it was saved after it has downloaded completely.
- Click on the file name to open it with Microsoft Excel. Save or print the file as you do normally in Excel.
- Note: Files remain on the download page for 90 days and then disappear.

Figure 5: Files download page

Tips for Saving Data Files

Data that includes client identifiers (for example, names, birth dates, client IDs, Medicaid numbers, addresses, phone numbers) should be saved to secure network directories that require a login with password to access or on passworded and encrypted devices.

When you save a data file, be sure to change the file type to Excel (extension **.xlsx)**, so that all Excel features are available when you work with the file. Any formulas, worksheets, or charts that you create in a .csv file will be lost when you close the file.