THEO Release Notes for Babies First! and CaCoon Programs, 5/16/2022

Changes will appear in the THEO database on Monday, 5/16/2022. Below are descriptions of the changes. Please contact **theo.support@dhsoha.state.or.us** if you have any questions or comments.

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New Features and Improvements

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1. New THEO login page

The website address for THEO has changed. Please log in from the new website address. Remember to update any saved bookmarks and desktop icons.

New! THEO Login Page – **https://clara-oregon.vistalogic.net/**

2. New and simpler way to enroll new clients in a family's Case ("Add Member")

THEO has a new and simpler way to enroll another family/household member into an existing Case. Instead of adding a New Application from the Care Menu, you may select "Add Member" from any other family member's Care Plan. Once someone in a family has enrolled in a program, anyone else from the same family/household who enrolls in the same program, can be added from the other family member's Care Plan.

You may continue to enroll new members into a family's Case the old way, but the new method offers some advantages.

- You don't have to remember to add the caregiver first on the New Application. "Add Member" opens an Application with the caregiver already included. You add only the new client(s).
- It is faster than the old method.

The most common reason for adding a new client to a 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.

Open a Care Plan from the home visitor's dashboard by clicking on the Open icon.
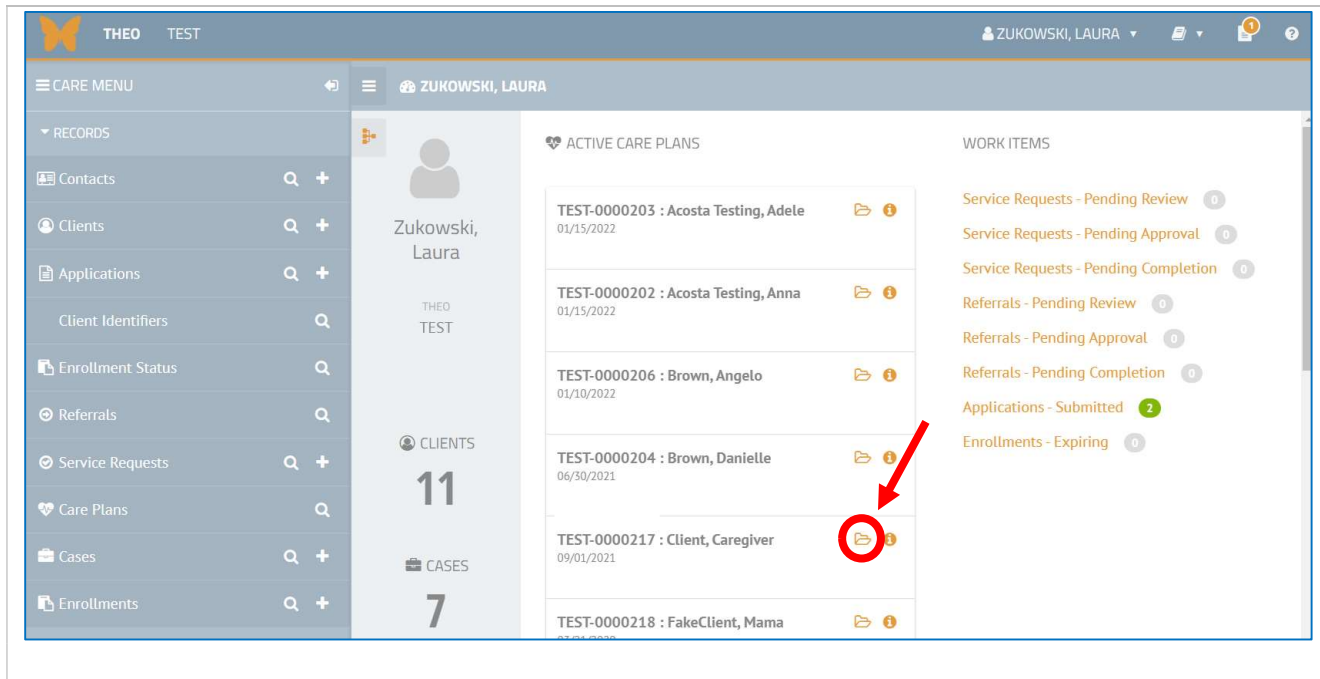
Care Plan opens.
- Hold your cursor over the Gear/Daisy icon to open the Actions menu.
- Click on "Add Member".
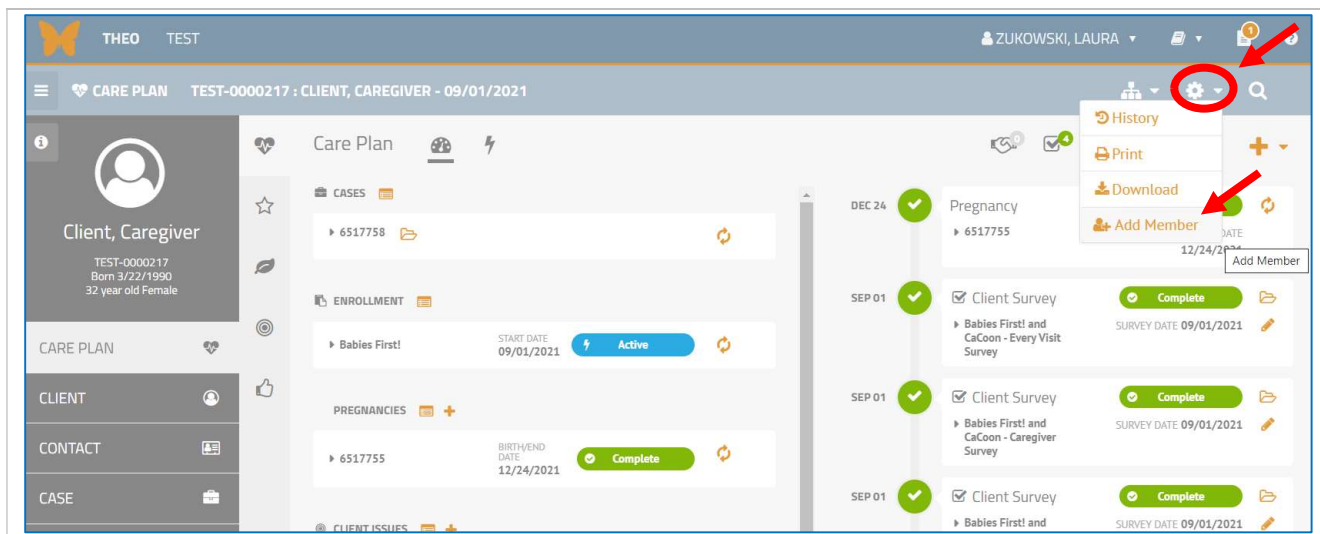
The Application workflow opens.

- The caregiver or the other family member, who enrolled previously, is listed automatically at the top of the Application.
- Enter the new client's information in the fields along the left margin of the screen.
- Click on the orange Save & Continue button. Follow remaining instructions on the screen to complete the application.

Additional changes have occurred in the Application workflow to simplify it. Both the old Add New Application method and the new Add Member method of enrollment have these improvements.

- Fewer steps! There is no longer a "Screening" step in the workflow. All fields that were on the "Screening" tab are removed from the workflow. "Client", "Eligibility", and "Enrollment" steps remain, with the minimum fields required for data collection.
- List of relationships on the "Client" step shows the first name then last name of each client, which is more like natural speech.
- The Guardian field has been removed from the "Client" step also.

3. Pregnancies and Enrollment sections added to the main page of Care Plan

Pregnancies and Enrollment sections are located on the main part of the Care Plan now to make them easier to find and quicker to access.

Click on the update icon in each of these sections to add or edit data.

- When someone disenrolls, always update the Enrollment record by adding the Enrollment End Date.
- After a baby is born and enrolls, please update the caregiver's Pregnancy record by adding the Birth Outcome and Birth/End Date.
- See section, "5. New Pregnancy Outcomes", **page 6**, for more information about other changes to the pregnancy data fields.
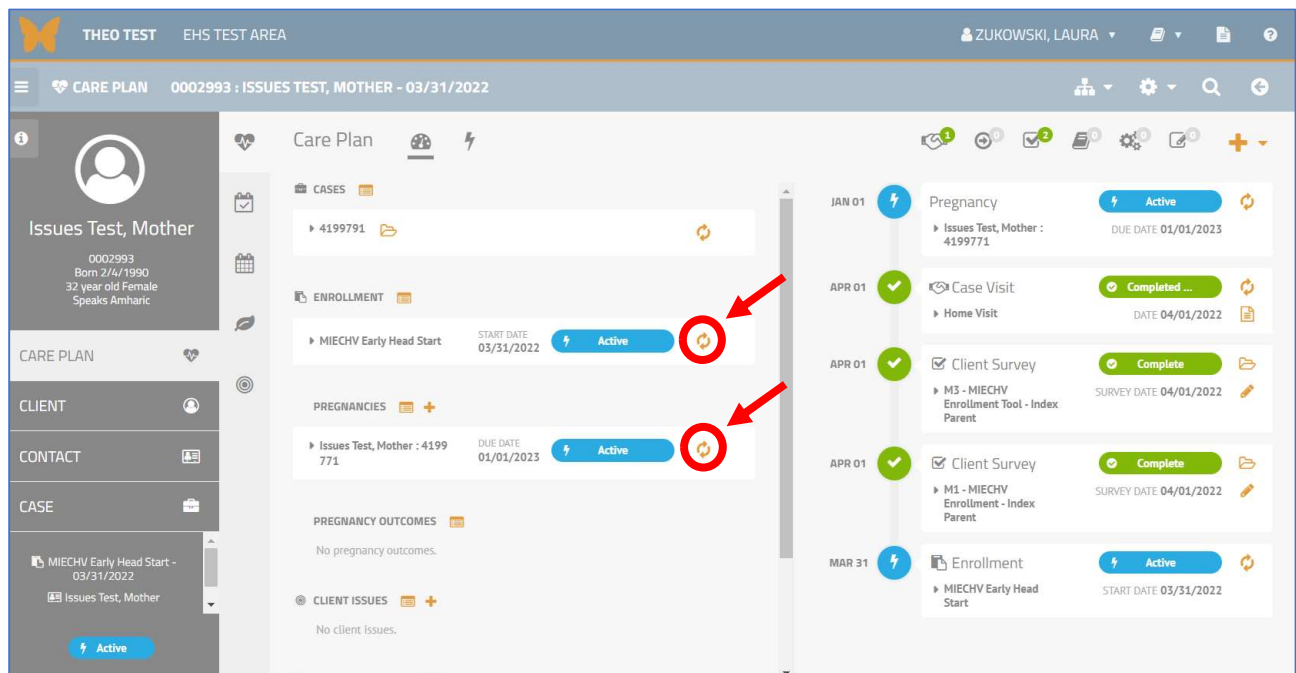
4. Other changes to Pregnancies section

The Pregnancies section is visible on a client's Care Plan only when the client has a Pregnancy record. The Care Plan below does not have a Pregnancies section, which would appear directly below the Enrollment section.

To add a pregnancy record to a client's Care Plan, when the Pregnancies section is not visible on the Care Plan, hold your cursor over the Attached Records icon to open the menu. Select the Add New Pregnancies icon, to the right of Pregnancies on the menu.
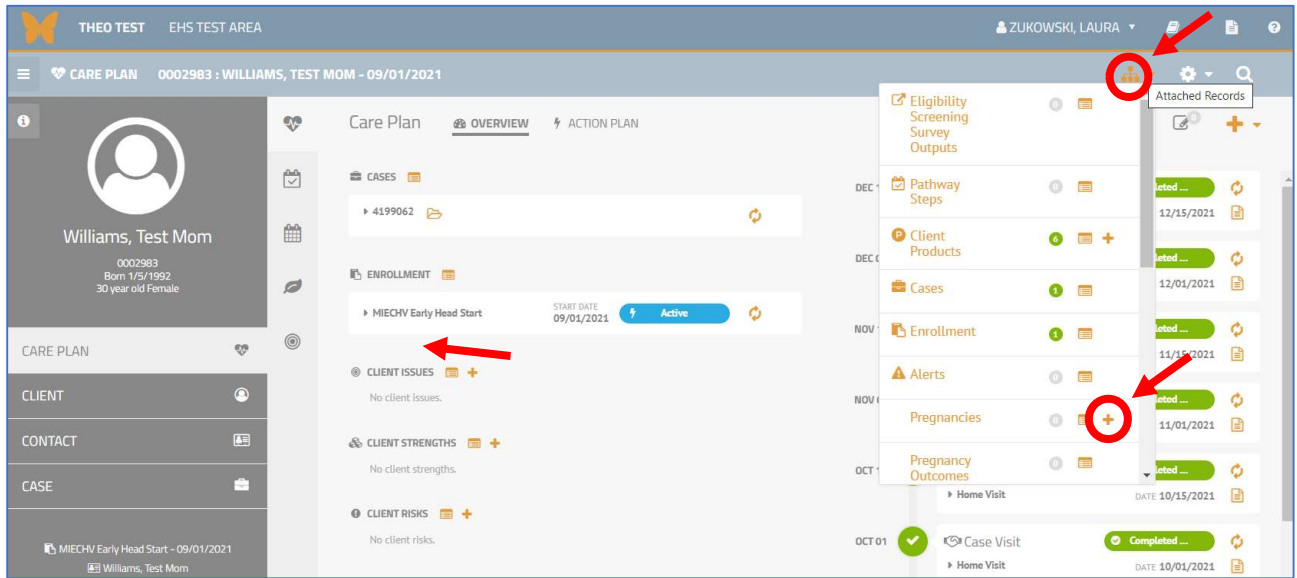
New Pregnancy record opens. Add **Due Date** and **Number of Babies Expected**. Click on the orange Save & Close button.
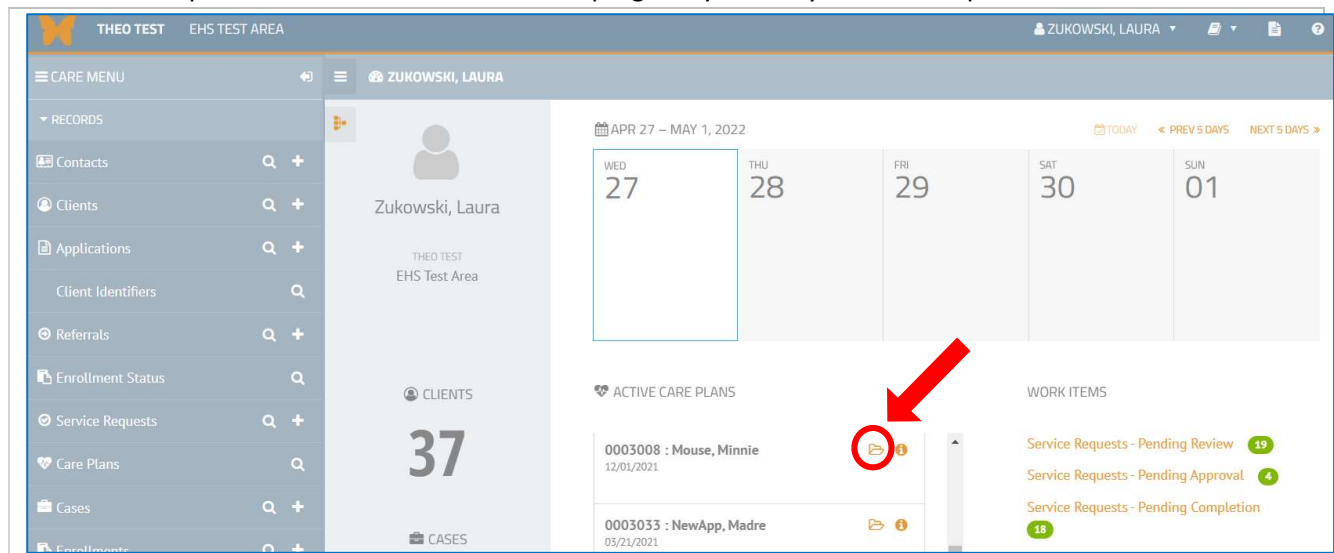
"Pregnancies" section appears on the client's Care Plan after the first pregnancy record for a client has been created.
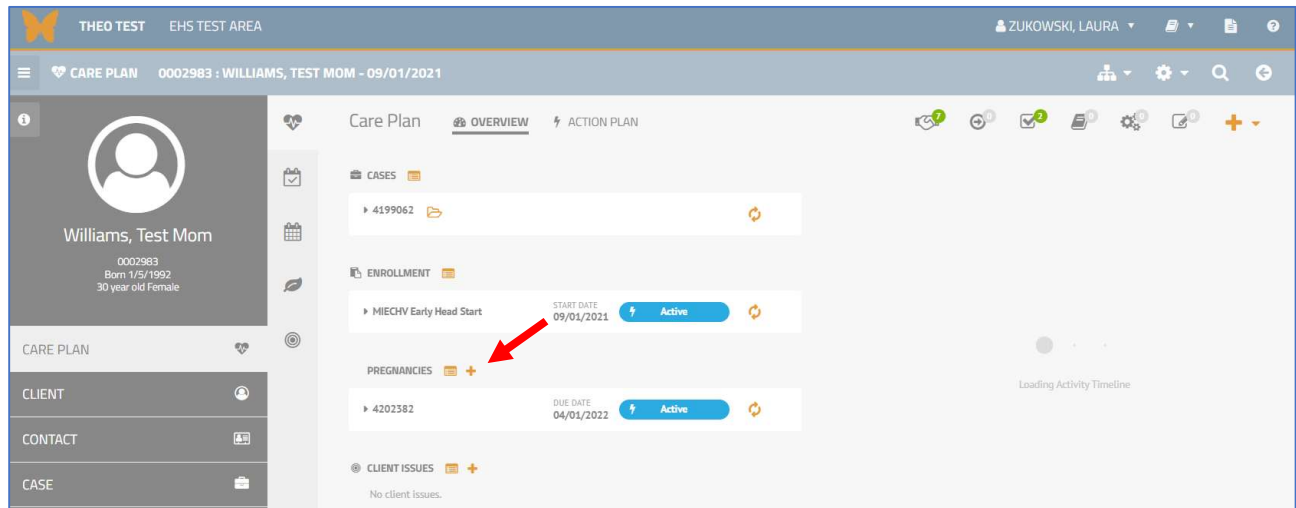
5. New Pregnancy Outcomes section on Care Plan

The Pregnancy Outcomes record was added to the main page of a client's Care Plan to collect more accurate data about the births of twins and triplets. The new fields allow THEO to collect a separate outcome for each baby in a multiple birth. The new Pregnancy Outcomes section appears onscreen after you update a Pregnancy by entering and saving a Birth Outcome and Birth/End Date. When a pregnant caregiver was expecting one baby, only one row will be added to the Pregnancy Outcomes section; when a caregiver was expecting 2 or 3 babies, then 2 or 3 rows will be added to the Pregnancy Outcomes section.

Click on the Open icon next to the client whose pregnancy record you wish to update.

Client's Care Plan opens and shows a Pregnancy record.
- Click on the Update Pregnancy icon.

Client's Pregnancy record opens.

Note: Number of Babies Expected field shows this caregiver is expecting 2 babies (twins).

Click on the Birth Outcome field to open the list of choices:

- Select "Live Birth", "SAB", "Stillbirth", or "TAB" if the outcome for both babies was the same. For example, both babies had the outcome "Live Birth".
- Select "Multiple Birth Outcomes" if you need to record a different birth outcome for each baby.
- Also enter the Birth/End Date of the Pregnancy, which is directly below the Birth Outcome field and not visible in the screenshot.
- Click on the orange Update & Close button.

Pregnancy record closes. Pregnancy Outcomes section appears on the Care Plan.

In this example, I selected "Live Birth" in the Birth Outcome field for the twins. THEO created an outcome for each baby and displays "Live Birth" on both Pregnancy Outcomes records.
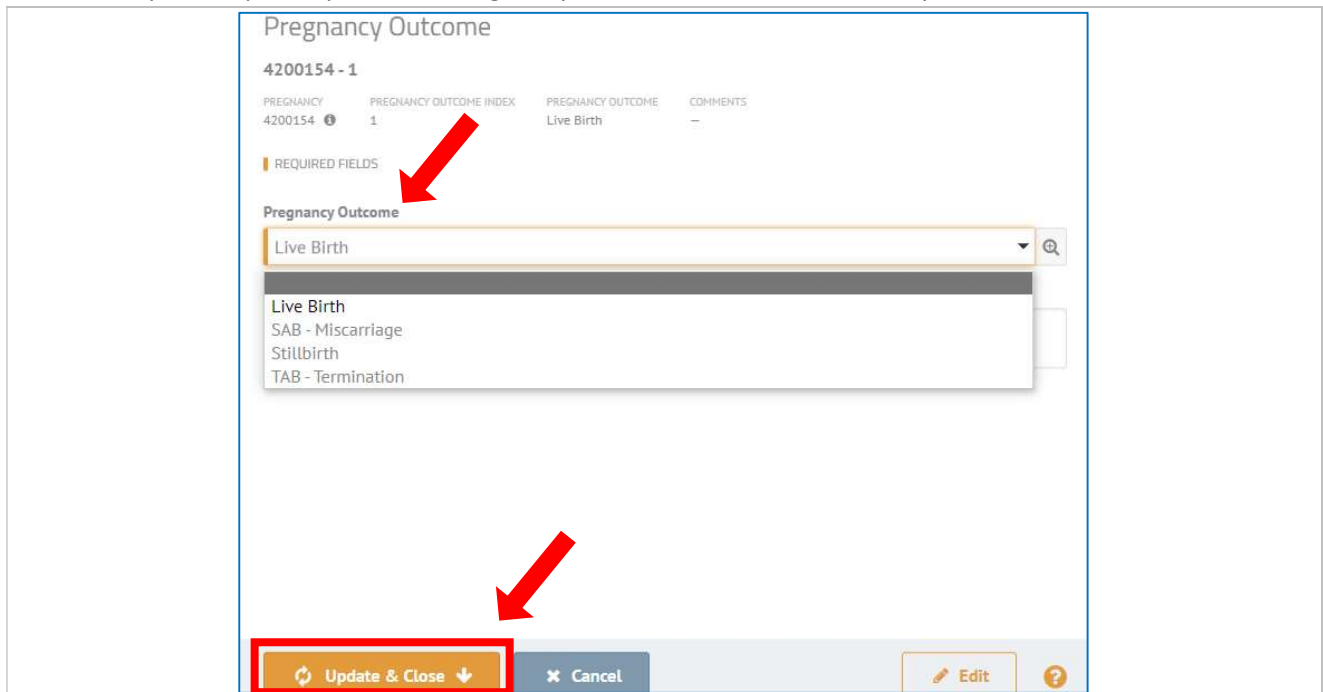
In this example, I updated the Pregnancy record by selecting "Multiple Birth Outcomes" in the Birth Outcome field and entering a Birth/End Date. THEO created an outcome record for each baby, but "(Unknown)" displays on both outcome records.

- To enter an outcome on both "Pregnancy Outcomes" records, click on the Update Pregnancy Outcomes icon on each record.
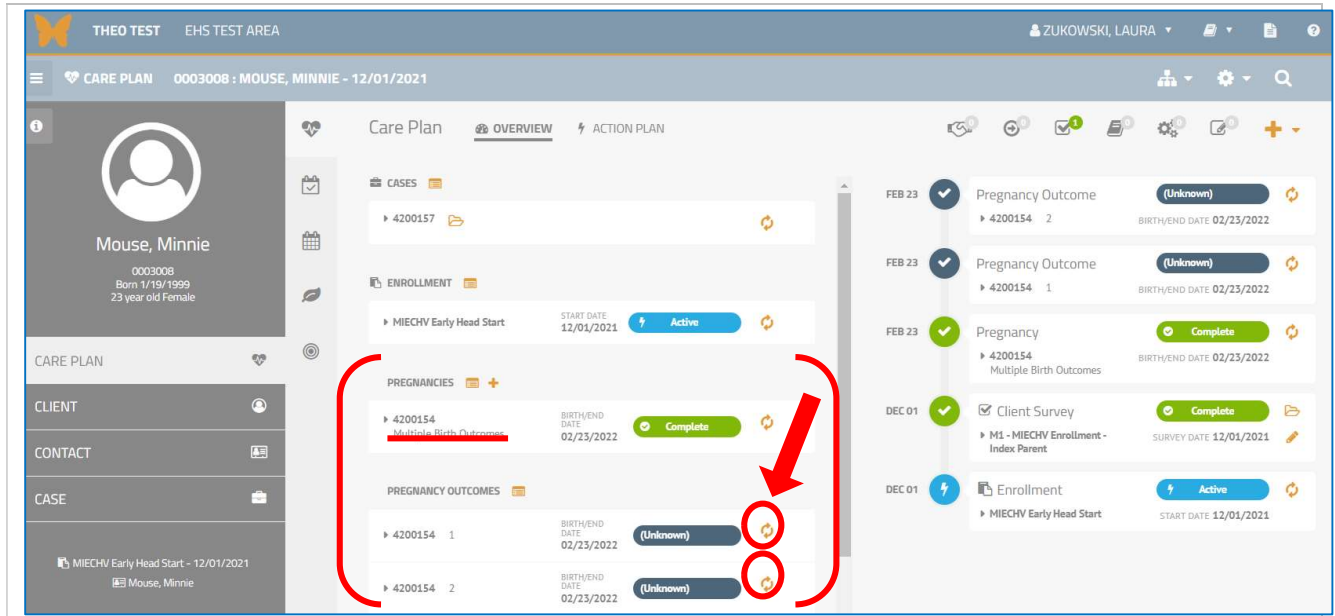
Pregnancy Outcome record opens.
- Enter the Outcome for the first baby. Click on the orange Update & Close button.
- Repeat steps to update the Pregnancy Outcome for the second baby.

The Pregnancy Outcome section displays a different outcome for each baby.

6. New response "Declined to self-identify" in the Gender field

"Declined to self-identify" is a new response in the Gender field and allows you to record when a client prefers not to answer this question. Expect to see more changes in the THEO's Gender, Ethnicity, and Race fields coming in 2023. Responses in these fields will incorporate Oregon's Race, Ethnicity, Language, and Disability (REALD) guidelines and the CDC's Sexual Orientation and Gender Identity Information (SOGI) guidelines for data collection.

Bug Fixes

There are no new bug fixes in this release.

Known Bugs That Are Not Fixed

1. "Add Member" will not re-enroll clients

The new way to enroll someone, by adding them to their family's existing Case, does not work correctly with clients who have previous enrollments. If you are aware that someone has been enrolled previously, please enroll them by adding a New Application from the Care Menu.

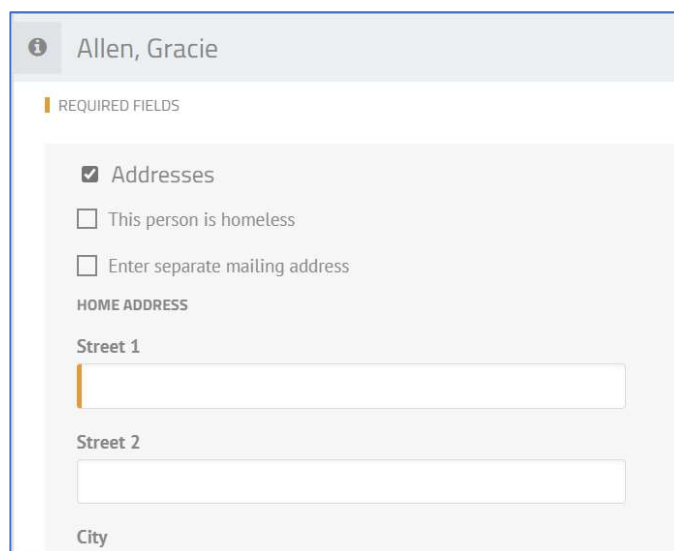## 2. Potential errors when enrolling clients

It's possible that THEO could display an error message when you are enrolling a Client. Things appeared to be working correctly during testing, but real life sometimes creates more complicated situations that what are on test plans.

Simple error messages that occur when you forget to enter a response in a required field, for example, can be fixed by correcting the data entry in the field. More serious issues are not fixable under a login without special rights and should be reported to THEO Application Support, **theo.support@dhsoha.state.or.us**. These types of issues include the following:

- Error messages with the phrase "nullable event" or "Sequence contains more than one element";
- When a Care Plan button or a green "Enrolled" badge doesn't appear next to a client's name at the end of the Application workflow;
- When a Client doesn't appear on a home visitor's dashboard after enrollment.

Tips to Simplify Using THEO

- Be sure to enter **Primary Spoken Language** for ALL Clients.
- Only add people to THEO when you are enrolling them. Please do not add Contacts to THEO for other family members who are NOT enrolling.
- Please do not add pregnancies to the system unless the caregiver intends to enroll the child in the program after birth.
- When a caregiver becomes pregnant <u>after</u> enrollment:
  - o Add a new Pregnancy record with the Due Date and the Number of Babies Expected.
- When Exiting a Client, always:
  - o Add an End Date (disenrollment date) to the Enrollment record for **each client** who leaves the program
  - o Add a Closure Survey to **each client's** Care Plan (Survey Date = disenrollment date).
  - o Also enter a Visit Survey if a disenrollment visit occurred. (Survey Date = disenrollment date)
- You can skip entering Addresses, Phone Numbers, and Email addresses even though the fields are marked as required. The two screenshots (below) show how to turn off these fields. Simply uncheck the checkboxes to the right of Addresses, Phone, and Email sections on the Client screen.

- Occasionally, you discover that a client you are trying to enroll might already have a record in THEO. After you enter the client's demographic information and try to save, you see a message that says, "The information you entered closely matches other records within the system".
  - THEO lists any records that might be for the same client.
  - Click on **DETAILS** to see more information about each record.

DETAILS shows you information about the possible match. If your client is a different client, click on the **Continue Without Merging** button.

If your Client is the same person, click on **Merge**.

- o The buttons at the bottom of the window will change. Click on **Merge & Continue** to combine the two client records.
- o Also click on **Overwrite identified Client with new information** if you wish to keep the new information that you entered on the Client record. Leave the **Overwrite identified Client with new information** checkbox unchecked if you wish to keep the information from the existing Client record.