

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@dhsosha.state.or.us if you have any questions or comments.

Table of Contents

New Features and Improvements	1
1. New THEO login page.....	1
2. New and simpler way to enroll new clients in a family’s Case (“Add Member”)	1
3. Pregnancies and Enrollment sections added to the main page of Care Plan	4
4. Other changes to Pregnancies section.....	4
5. New Pregnancy Outcomes section on Care Plan.....	6
6. New response “Declined to self-identify” in the Gender field	10
Bug Fixes	10
Known Bugs That Are Not Fixed	10
1. “Add Member” will not re-enroll clients.....	10
2. Potential errors when enrolling clients.....	10
Tips to Simplify Using THEO	11

New Features and Improvements

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”)

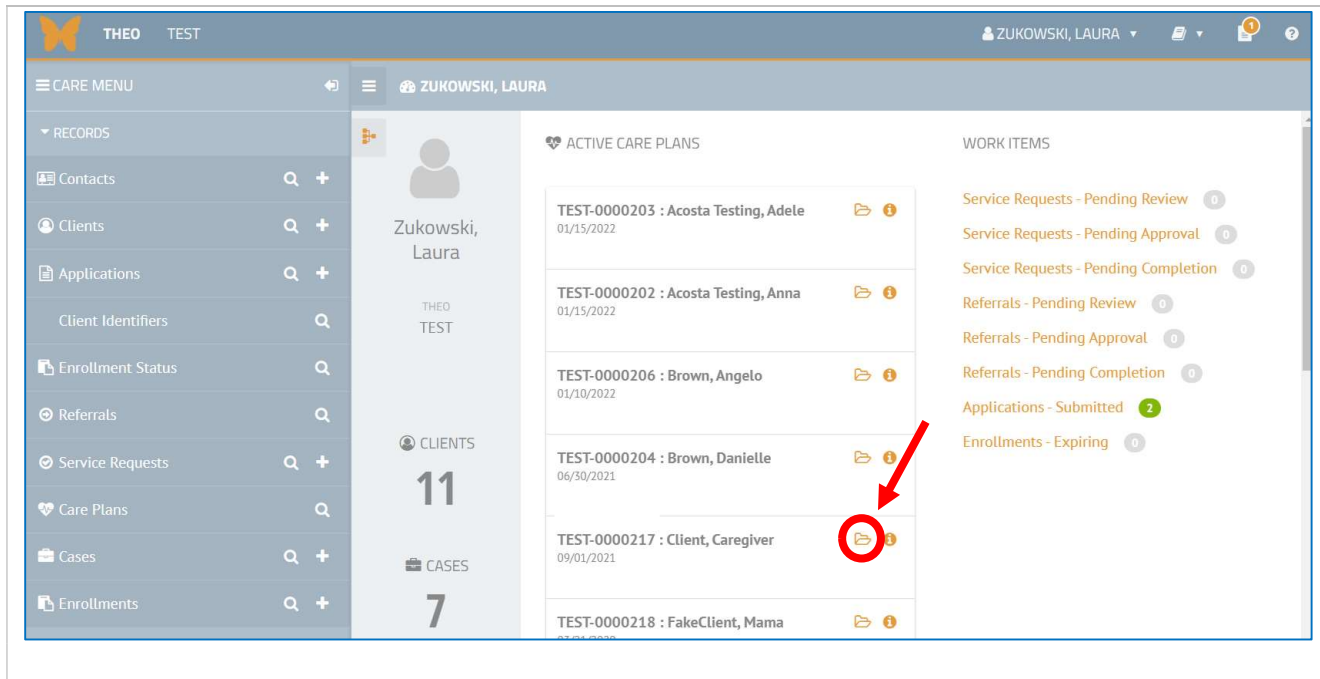
THEO has a new and simpler way to enroll another family/household member into an existing Case. Instead of adding a New Application from the Care Menu, you may select “Add Member” from any other family member’s Care Plan. Once someone in a family has enrolled in a program, anyone else from the same family/household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

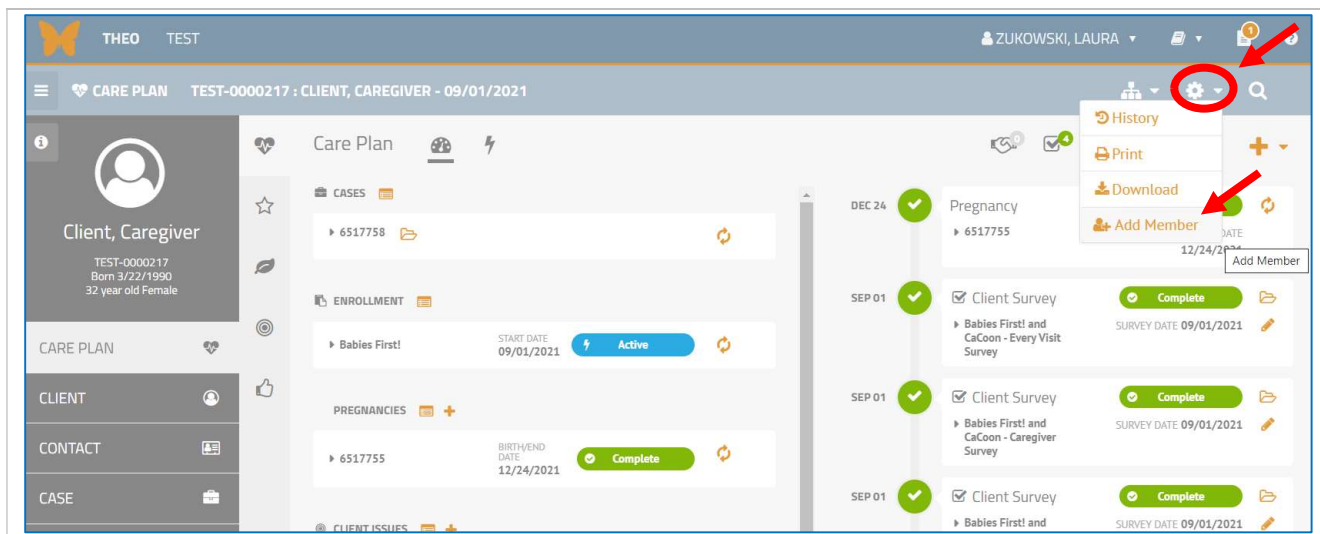
The most common reason for adding a new client to a Case is enrolling a newborn after a mother's prenatal enrollment. Other common reasons to add a new family member to a Case include changing the caregiver in a Case or enrolling additional children.

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.

CLIENT INTAKE CLIENT ELIGIBILITY ENROLLMENT

Client, Caregiver Female | DOB: 03/22/1990 | TEST-0000217

Add New Client Information or Select an Existing Client

REQUIRED FIELDS

Last Name

First Name

Middle Name

Prefix

Suffix

Save & Continue →

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.

CLIENT INTAKE CLIENT ELIGIBILITY ENROLLMENT

Williams, Test Mom Female | DOB: 01/05/1992 | 0002983

Relationships

Please define relationships for Newborn Williams

Newborn Williams is to Test Mom Williams

Primary Contact for Newborn Williams

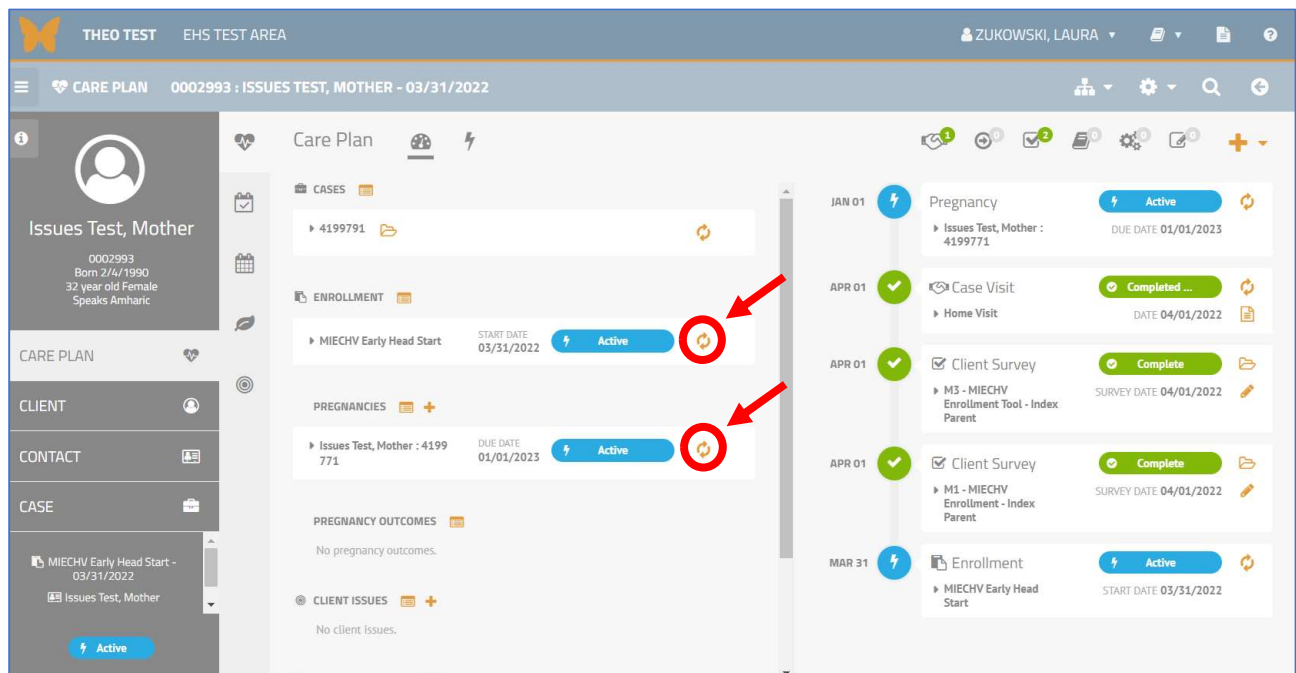
Test Mom Williams

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.

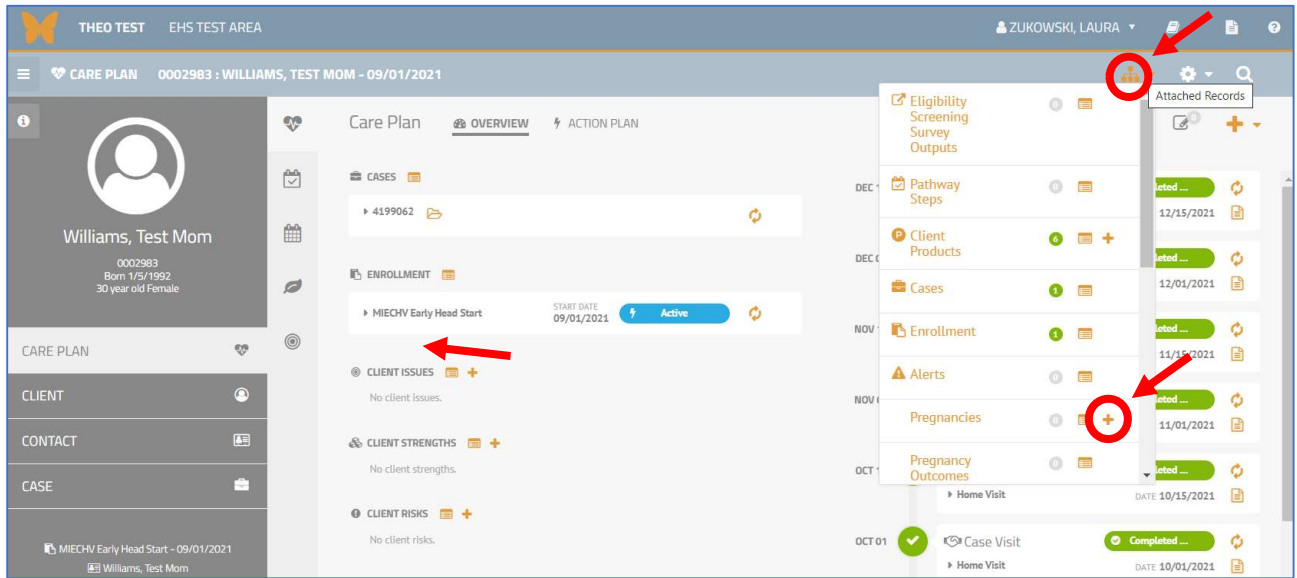
- When someone disenrolls, always update the Enrollment record by adding the Enrollment End Date.
- After a baby is born and enrolls, please update the caregiver's Pregnancy record by adding the Birth Outcome and Birth/End Date.
- See section, "5. New Pregnancy Outcomes", [page 6](#), for more information 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.

Pregnancy

4202372 - 04/01/2022

PERSON	PREGNANCY	DUE DATE	NUMBER OF BABIES EXPECTED	BIRTH OUTCOME	BIRTH/END DATE
2NewApp, Mama : 4200897	4202372	4/1/2022	2	—	—

REQUIRED FIELDS

Due Date

4/1/2022

Number of Babies Expected

2

Birth Outcome

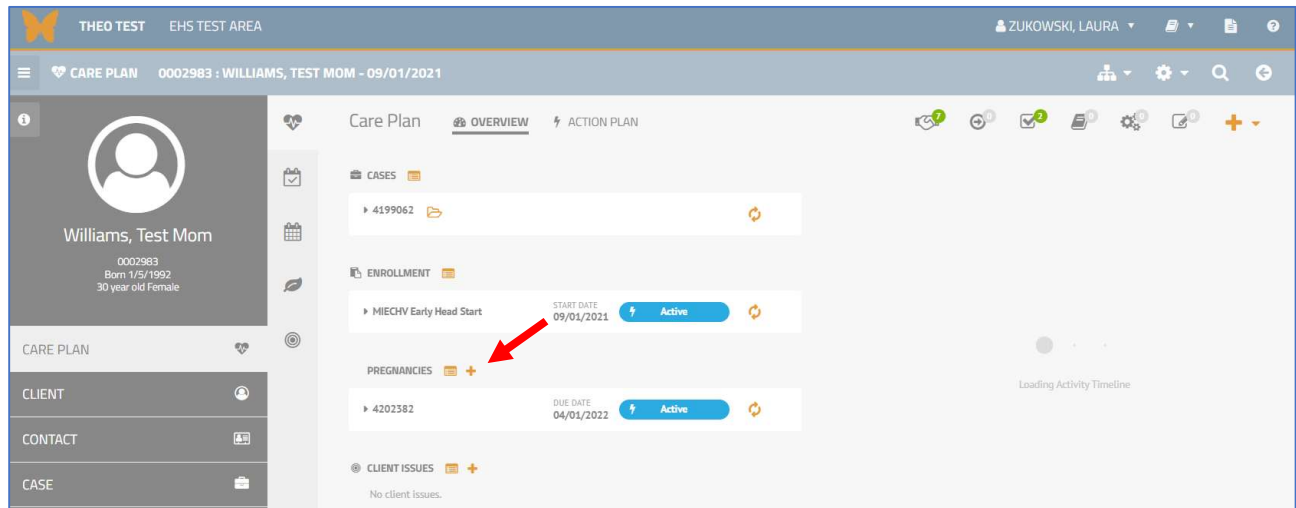
Birth/End Date

MM/DD/YYYY

Date pregnancy ends. The input of this date requires that an Outcome be entered.

Update & Close | Cancel | Edit

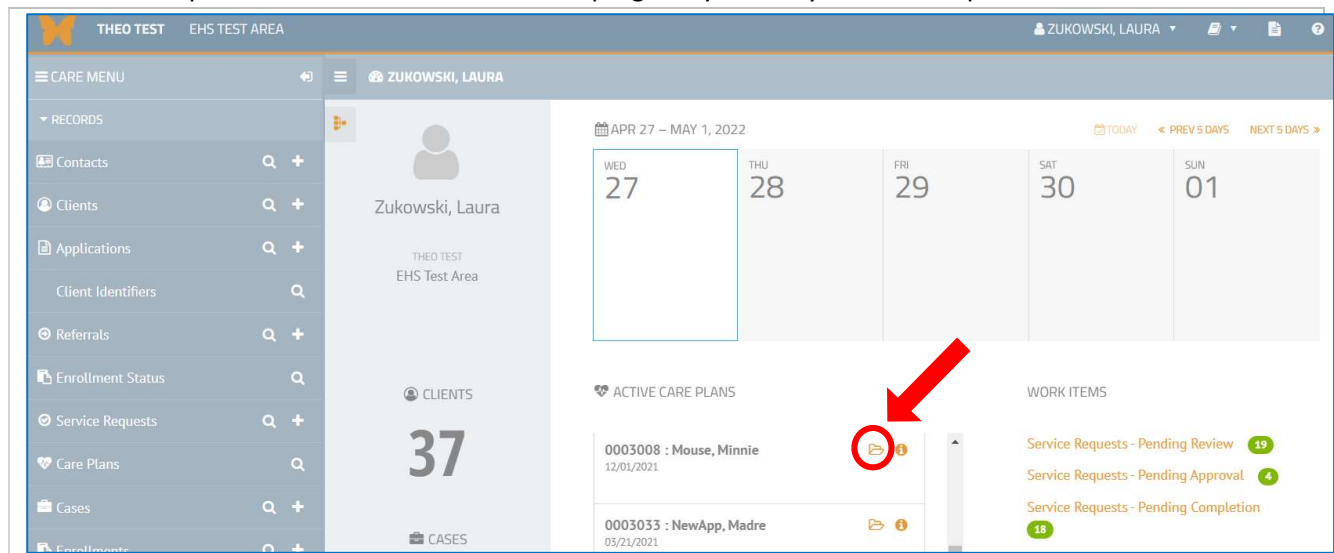
“Pregnancies” section appears on the client’s Care Plan after the first pregnancy record for a client has been created.



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.

THEO TEST EHS TEST AREA ZUKOWSKI, LAURA

CARE PLAN 0003008 : MOUSE, MINNIE - 12/01/2021

CARE PLAN OVERVIEW ACTION PLAN

CASES

- 4200157

ENROLLMENT

- MIECHV Early Head Start START DATE 12/01/2021 Active

PREGNANCIES

- 4200154 DUE DATE 02/22/2022 Active

CLIENT ISSUES

No client issues.

PERSONAL INFORMATION: Mouse, Minnie, 0003008, Born 1/19/1999, 23 year old Female

CARE PLAN

CLIENT

CONTACT

CASE

Activity Log:

- FEB 22 Pregnancy 4200154 DUE DATE 02/22/2022 Active
- DEC 01 Client Survey M1 - MIECHV Enrollment - Index Parent SURVEY DATE 12/01/2021 Complete
- DEC 01 Enrollment MIECHV Early Head Start START DATE 12/01/2021 Active

Client's Pregnancy record opens.

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

Pregnancy

4200154 - 02/22/2022

PERSON	PREGNANCY	DUE DATE	NUMBER OF BABIES EXPECTED	BIRTH OUTCOME	BIRTH/END DATE
Mouse, Minnie : 4200148	4200154	2/22/2022	2	-	-

REQUIRED FIELDS

Due Date: 2/22/2022

Number of Babies Expected: 2

Birth Outcome: [Dropdown]

Birth/End Date: MM/DD/YYYY

Date pregnancy ends. The input of this date requires that an Outcome be entered.

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
4200154 - 02/22/2022

PERSON	PREGNANCY	DUE DATE	NUMBER OF BABIES EXPECTED	BIRTH OUTCOME	BIRTH/END DATE
Mouse, Minnie : 4200148	4200154	2/22/2022	2	-	-

REQUIRED FIELDS

Due Date
2/22/2022

Number of Babies Expected
2

Birth Outcome
Live Birth
Multiple Birth Outcomes
SAB - Miscarriage
Stillbirth
TAB - Termination

Update & Close Cancel Edit

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.

CARE PLAN 0003008 : MOUSE, MINNIE - 12/01/2021

CARE PLAN OVERVIEW ACTION PLAN

CASES
4200157

ENROLLMENT
MIECHV Early Head Start 12/01/2021 Active

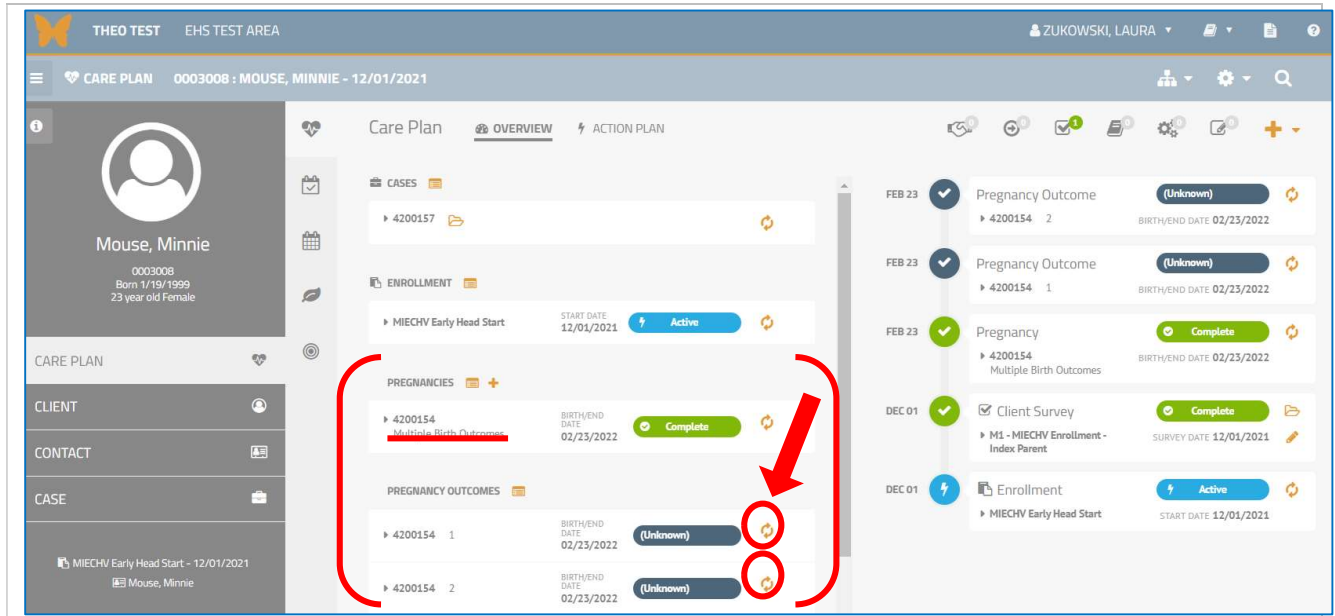
PREGNANCIES
4200154 Live Birth 02/23/2022 Complete

PREGNANCY OUTCOMES
4200154 1 Live Birth 02/23/2022
4200154 2 Live Birth 02/23/2022

Activity Log:
FEB 23 Pregnancy Outcome 4200154 2 Live Birth 02/23/2022
FEB 23 Pregnancy Outcome 4200154 1 Live Birth 02/23/2022
FEB 23 Pregnancy 4200154 Live Birth 02/23/2022 Complete
DEC 01 Client Survey Complete
DEC 01 M1 - MIECHV Enrollment - Index Parent
DEC 01 Enrollment MIECHV Early Head Start 12/01/2021 Active

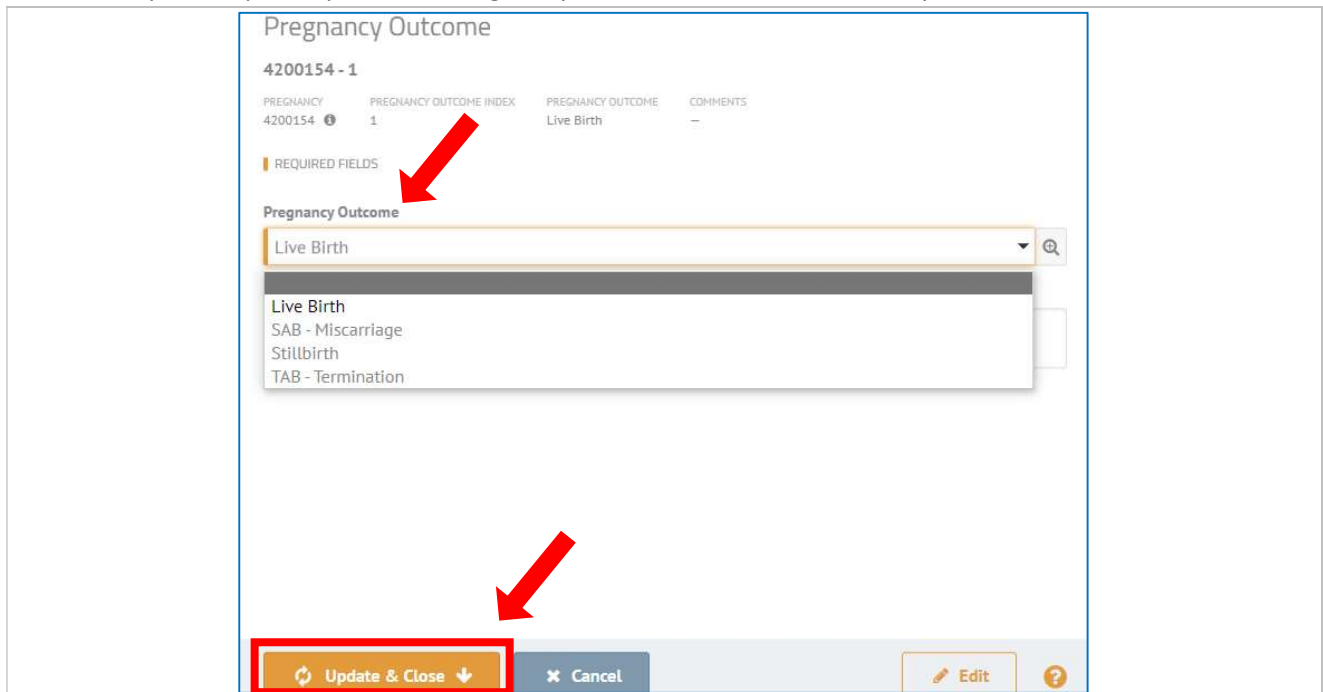
In this example, I updated the Pregnancy record by selecting “Multiple Birth Outcomes” in the Birth Outcome field and entering a Birth/End Date. THEO created an outcome record for each baby, but “(Unknown)” displays on both outcome records.

- 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.

The screenshot shows the THEO software interface for a client named Minnie Mouse. The interface is divided into several sections: a left sidebar with client information, a central 'Care Plan' overview, and a right-hand 'Pregnancy Outcome' section. The 'Pregnancies' section in the center is highlighted with a red bracket and a red arrow pointing to a 'Complete' status for 'Multiple Birth Outcomes'. The 'Pregnancy Outcomes' section below it shows three entries: 'Live Birth' for the first baby and 'Stillbirth' for the second baby. The right-hand section shows a list of pregnancy outcomes with dates and status indicators.

Section	Item	Status	Birth/End Date
PREGNANCIES	4200154 Multiple Birth Outcomes	Complete	02/23/2022
	PREGNANCY OUTCOMES	4200154 1 Live Birth	02/23/2022
		4200154 2 Stillbirth	02/23/2022
PREGNANCY OUTCOME	FEB 23 4200154 2 Stillbirth	02/23/2022	
	FEB 23 4200154 1 Live Birth	02/23/2022	
	FEB 23 4200154 Multiple Birth Outcomes	02/23/2022	
	DEC 01 M1 - MIECHV Enrollment - Index Parent	12/01/2021	
	DEC 01 MIECHV Early Head Start	12/01/2021	
	DEC 01 Client Survey	12/01/2021	

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

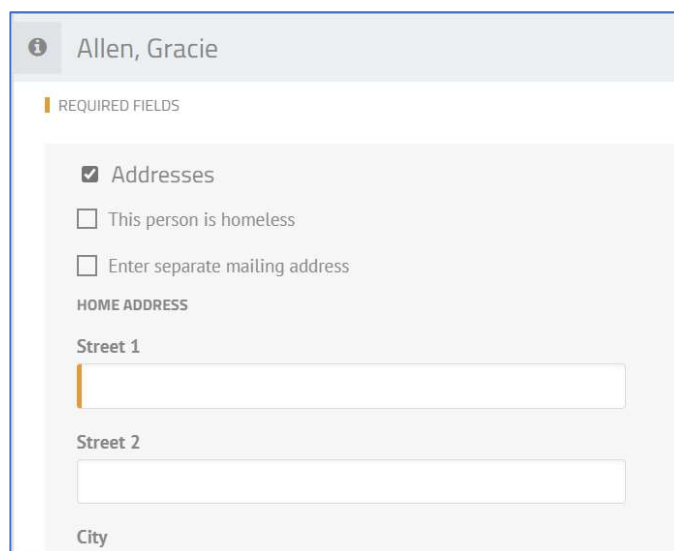
It’s possible that THEO could display an error message when you are enrolling a Client. Things appeared to be working correctly during testing, but real life sometimes creates more complicated situations that what are on test plans.

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@dhsosha.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 after enrollment:
 - Add a new Pregnancy record with the Due Date and the Number of Babies Expected.
- When Exiting a Client, always:
 - Add an End Date (disenrollment date) to the Enrollment record for **each client** who leaves the program
 - Add a Closure Survey to **each client’s** Care Plan (Survey Date = disenrollment date).
 - 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.



The screenshot shows a client profile for "Allen, Gracie". Under the "REQUIRED FIELDS" section, the "Addresses" checkbox is checked. Below it are two unchecked checkboxes: "This person is homeless" and "Enter separate mailing address". Under the "HOME ADDRESS" section, there are three text input fields labeled "Street 1", "Street 2", and "City".

Allen, Gracie

REQUIRED FIELDS

Addresses

Phone

Email

- 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.

CLIENT INTAKE | CLIENT | SCREENING | ELIGIBILITY | ENROLLMENT

Cleary, Beverly | Female | DOB: 01/01/1985 | 0001656

Cleary, Beverly

CLIENT ID: 0001656 | LAST NAME: Cleary | FIRST NAME: Beverly

MIDDLE NAME: | PREFIX: | SUFFIX: |

ALSO KNOWN AS: | BIRTH DATE: 01/01/1985 | GENDER: Female

PRIMARY SPOKEN LANGUAGE: |

SECONDARY SPOKEN LANGUAGE: |

PREFERRED WRITTEN LANGUAGE: |

REQUIRES INTERPRETIVE SERVICES: |

ALTERNATE WRITTEN MATERIALS FORMAT: |

LOCAL CLIENT ID: | MEDICAID (OHP) NUMBER: |

CONTACT PREFERENCE: | SPECIAL INSTRUCTIONS: |

Cleary, Beverly : Potential Matches

The information you entered closely matches other records within the system.

Please review the potential matches and indicate the appropriate merge decision. If no records match, then select "Continue (without merging)". If a match exists, you may choose to overwrite the match record with the new information by selecting the check box next to the "Merge & Continue" button. Otherwise, the new information will be discarded.

MERGE DECISION	PROBABILITY	IDENTIFIER	FIRST NAME	LAST NAME	BIRTHDATE	GENDER	SPOKEN LANGUAGE
<input checked="" type="radio"/> Continue (without merging)							
<input type="checkbox"/> Merge	0.90	0000008	Beverly	Cleary	1/1/1985	Female	
			▶ DETAILS				

Continue Without Merging

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

Cleary, Beverly : Potential Matches

The information you entered closely matches other records within the system.

Please review the potential matches and indicate the appropriate merge decision. If no records match, then select "Continue (without merging)". If a match exists, you may choose to overwrite the match record with the new information by selecting the check box next to the "Merge & Continue" button. Otherwise, the new information will be discarded.

MERGE DECISION	PROBABILITY	IDENTIFIER	FIRST NAME	LAST NAME	BIRTHDATE	GENDER	SPOKEN LANGUAGE
<input checked="" type="radio"/> Continue (without merging)							
<input type="radio"/> Merge	0.90	0000008	Beverly	Cleary	1/1/1985	Female	

DETAILS

CONTACT ID	CLIENT ID	AREA	LAST NAME	FIRST NAME	MIDDLE NAME	PREFIX	SUFFIX	ALSO KNOWN AS	BIRTH DATE	GENDER
Cleary, Beverly : 3784969	0000008	EHS Practice Area	Cleary	Beverly					01/01/1985	Female

Merge & Continue Overwrite identified Client with new information?

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

- The buttons at the bottom of the window will change. Click on **Merge & Continue** to combine the two client records.
- 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.

Cleary, Beverly : Potential Matches

The information you entered closely matches other records within the system.

Please review the potential matches and indicate the appropriate merge decision. If no records match, then select "Continue (without merging)". If a match exists, you may choose to overwrite the match record with the new information by selecting the check box next to the "Merge & Continue" button. Otherwise, the new information will be discarded.

MERGE DECISION	PROBABILITY	IDENTIFIER	FIRST NAME	LAST NAME	BIRTHDATE	GENDER	SPOKEN LANGUAGE
<input type="radio"/> Continue (without merging)							
<input checked="" type="radio"/> Merge	0.90	0001656	Beverly	Cleary	1/1/1985	Female	

DETAILS

CONTACT ID	CLIENT ID	AREA	LAST NAME	FIRST NAME	MIDDLE NAME	PREFIX	SUFFIX	ALSO KNOWN AS	BIRTH DATE	GENDER
Cleary, Beverly : 4179234	0001656	HFA Practice Area	Cleary	Beverly					01/01/1985	Female

Merge & Continue Overwrite identified Client with new information?