
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@dhsosha.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
1.1 THEO Application Support.....	1
1.2 Requirements for using THEO	1
1.3 Log in to your account.....	2
1.3.1 Activate your THEO account and log in for the first time	2
1.4 Password maintenance	6
1.4.1 Reset your password when you forget your password.....	6
1.4.2 Reset your password every 60 days.....	12
1.5 Logout notice.....	15
1.6 Log off (Log out)	16
1.7 Security best practices	17
1.7.1 Unique login and secure password.....	17
1.7.2 Do not share your login.....	17
1.7.3 Confidentiality and security requirements	18
1.7.4 Electronic footprint and security auditing	18
2.0 THEO Home Page and Care Menu	19
2.1 THEO Home Page	19
2.2 Icons and moving around in THEO	21
2.3 Care Menu	24
3.0 Enrolling Clients with THEO's Application	27
3.1 Index Parent Enrolls with or without an Index Child: Add New Application	27
3.2 Another Client Enrolls AFTER the Index Parent: Add Member	34
3.3 Enter a Case Visit and Client Survey	35
3.3.1 Case Visit	36
3.3.2 Client Survey	38
3.3.3 Update the Index Parent's pregnancy record when enrolling the newborn	42
4.0 Disenrollment	45
4.1 Disenrollment Survey – M47-THEO-MIECHV Program Exit.....	45
4.2 Final Case Visit (if one occurred)	47
4.3 Enrollment End Date	48
5.0 Error Messages and Fixing Data Entry	51
5.1 Error messages	51
5.1.1 Error message below a required field.....	51
5.1.2 Common error message related to a date.....	53
5.2 Edit a survey	55
5.3 Delete a survey.....	59

6.0 Data Reporting.....	63
6.1 List Views.....	63
6.2 Search for data using search filters	65
6.3 Filter for specific records.....	68
6.4 Sort records.....	70
6.5 Download results in a data file	72

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@dhsosha.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 into 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).

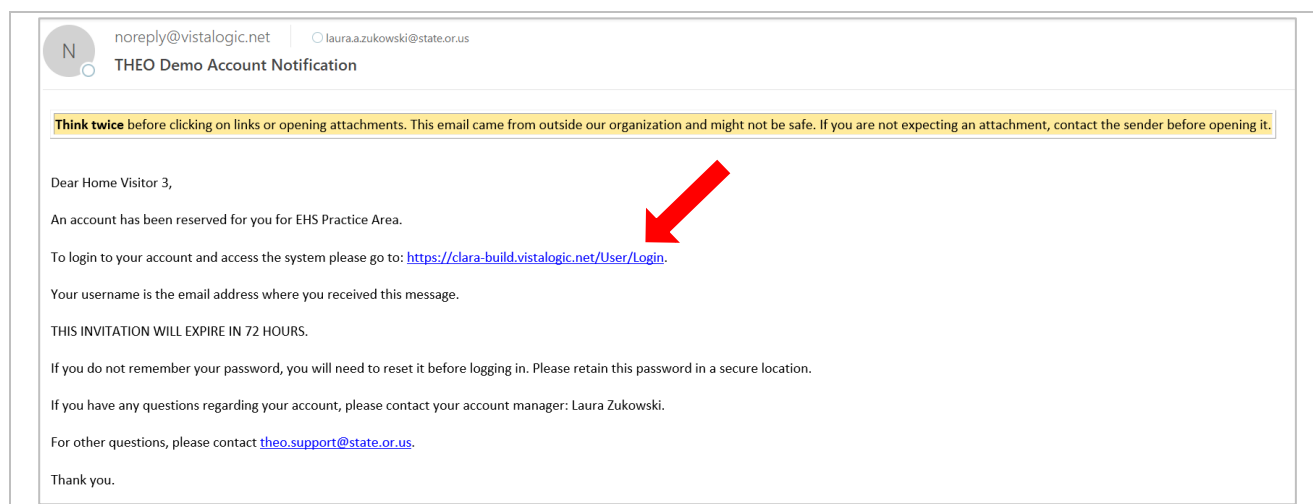


Figure 1: THEO Account Notification email

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

Warning: The row of icons at the bottom of the login screen (Figure 2) are the internet browsers that are compatible with THEO. 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:

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

Microsoft Internet Explorer is not recommended for use 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 1: THEO Login screen

- The Activate Your Account screen opens.
- Enter:
 - your work Email address, and
 - a Password that includes at least 9 total characters and at least one special character, for example (!, @, #, \$, %, ^, *). Upper 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 (Figure 3).

Figure 2: 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.
- Click on orange Login button

Figure 4: THEO Login page

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

Figure 5: THEO Home Page

1.3.2 Log in to THEO after your account is activated

- After your login is activated, you can log in to THEO 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.
- 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.

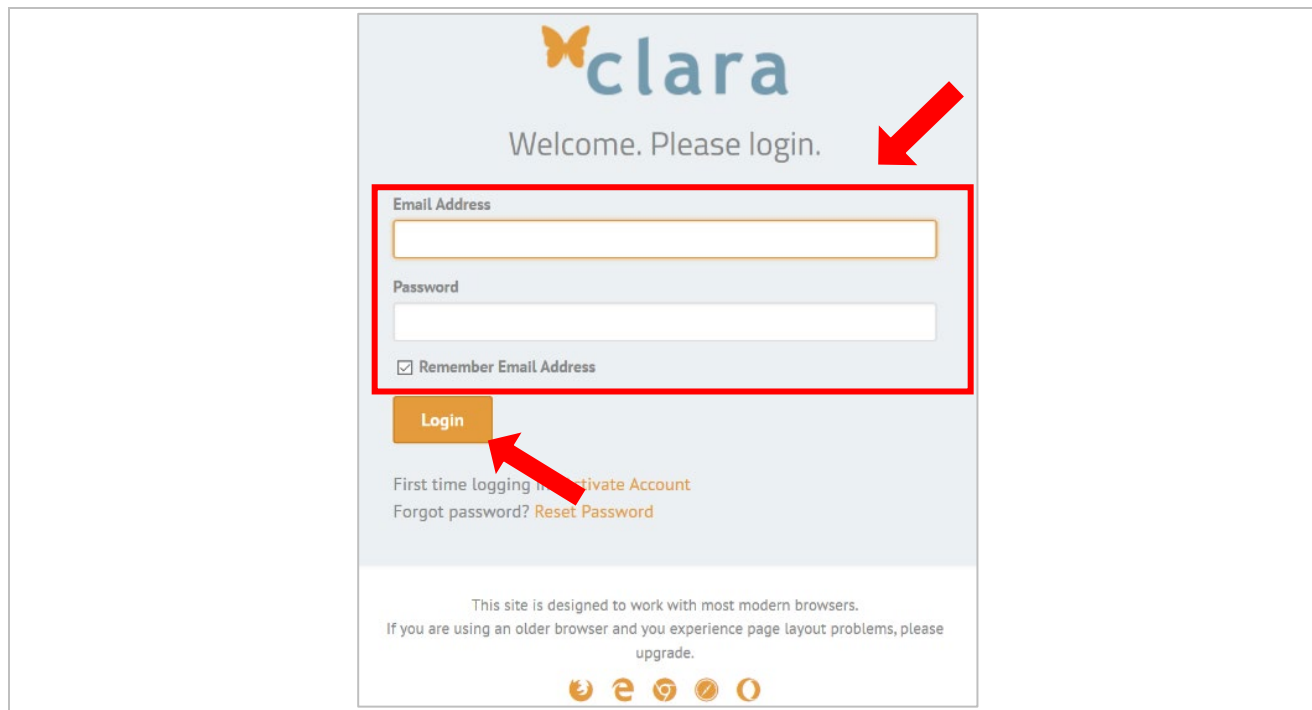


Figure 1: THEO Login screen

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

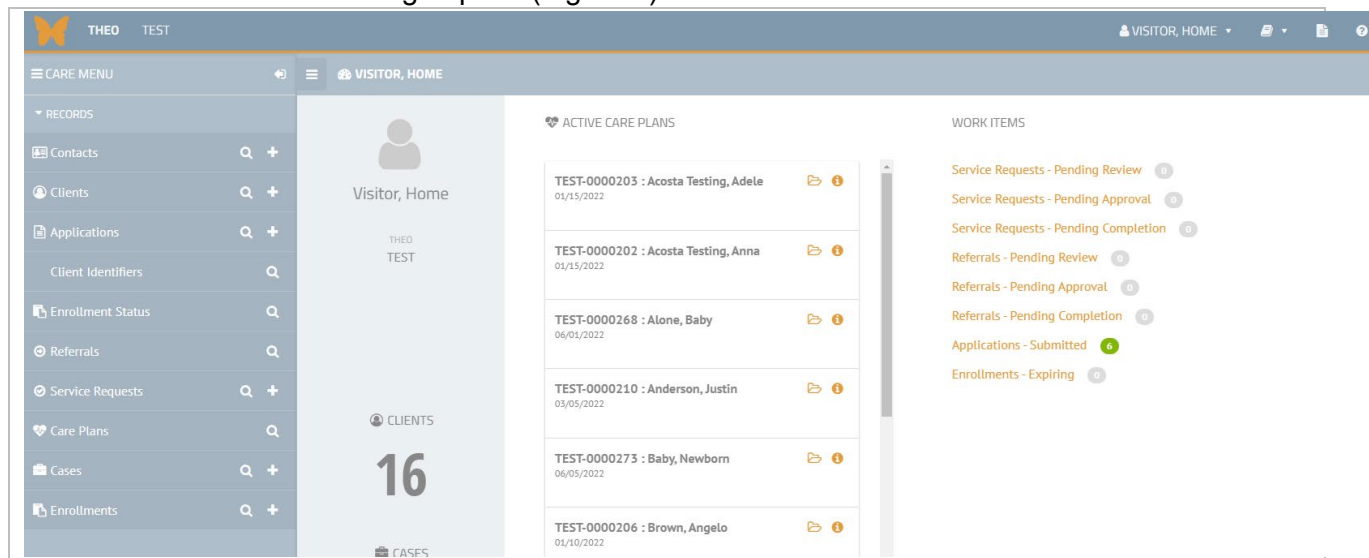


Figure 2: THEO Home Page

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).

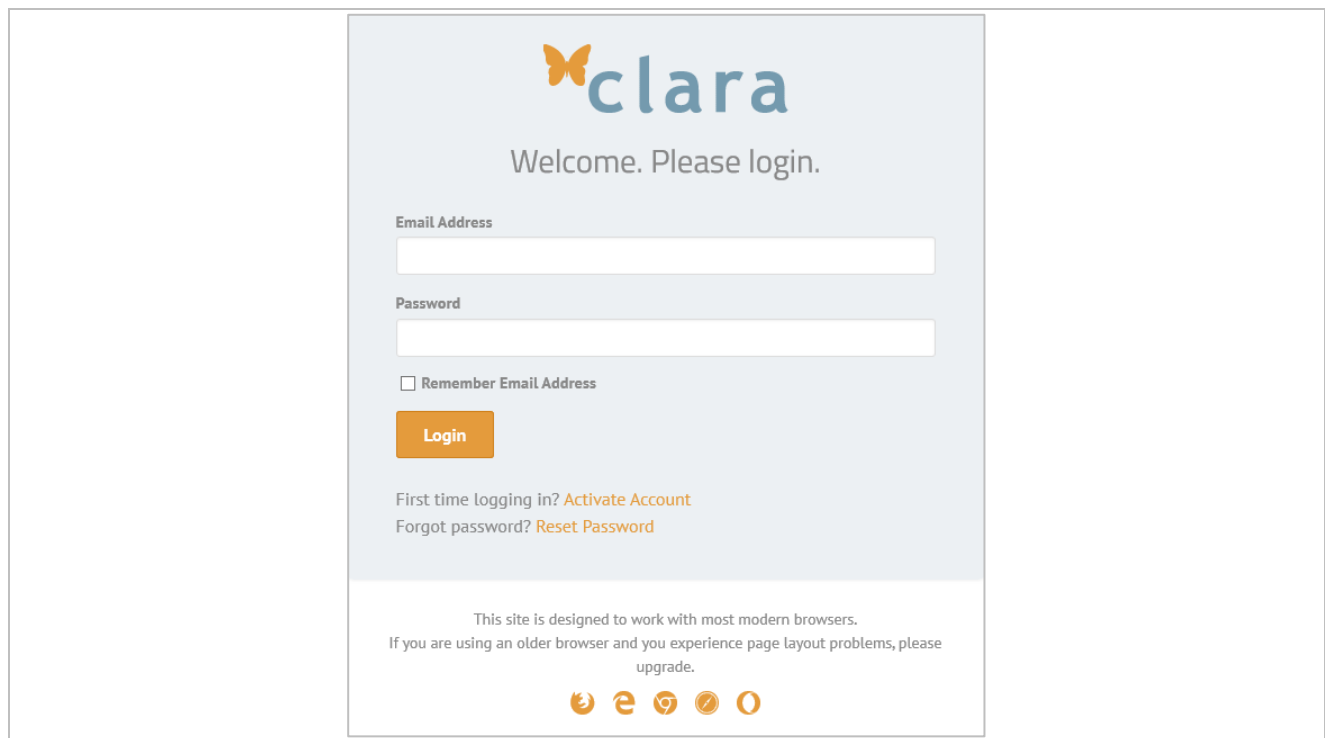


Figure 1: THEO Login screen

- 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).

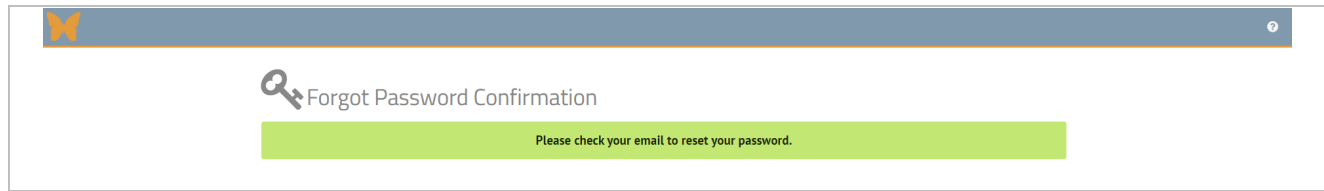


Figure 4: Forgot Password Confirmation screen

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

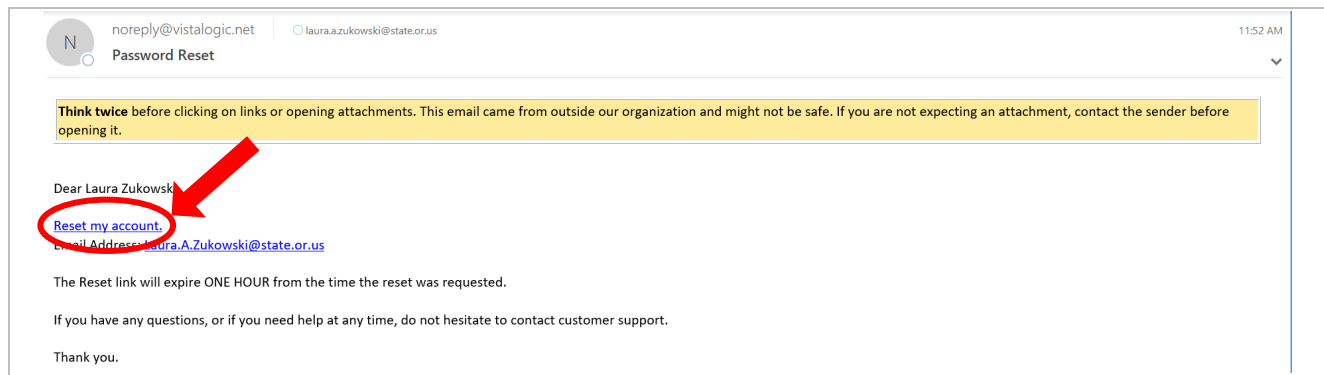


Figure 5: Password Reset email

- 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.

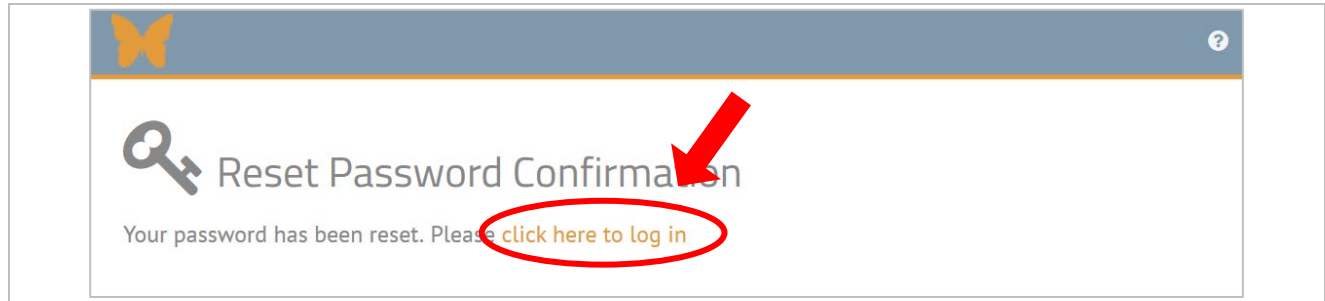


Figure 7: Reset Password Confirmation

- 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.

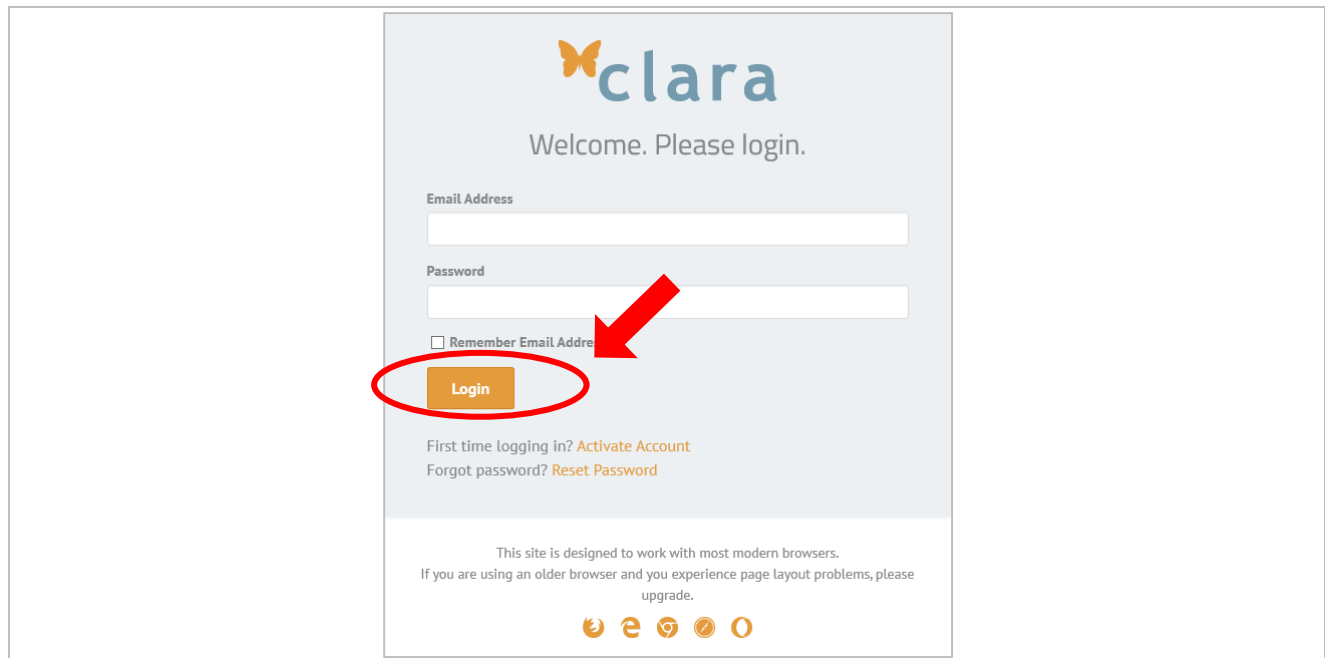


Figure 8: THEO Login screen

- 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.

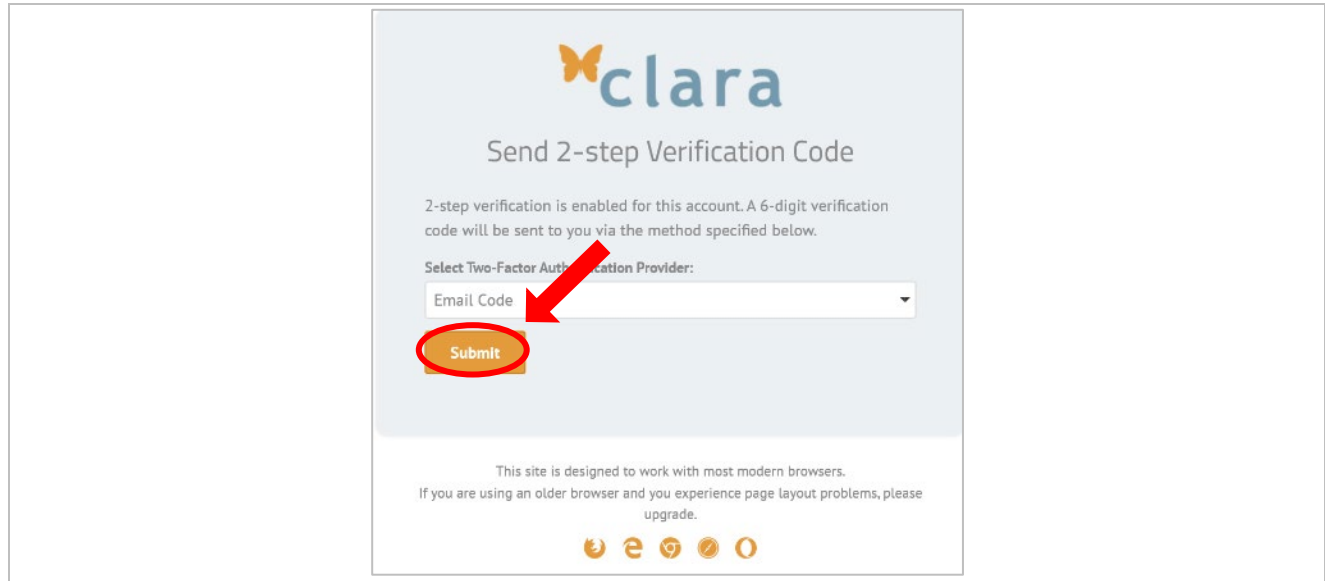


Figure 9: Send 2-step Verification Code screen

- 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).

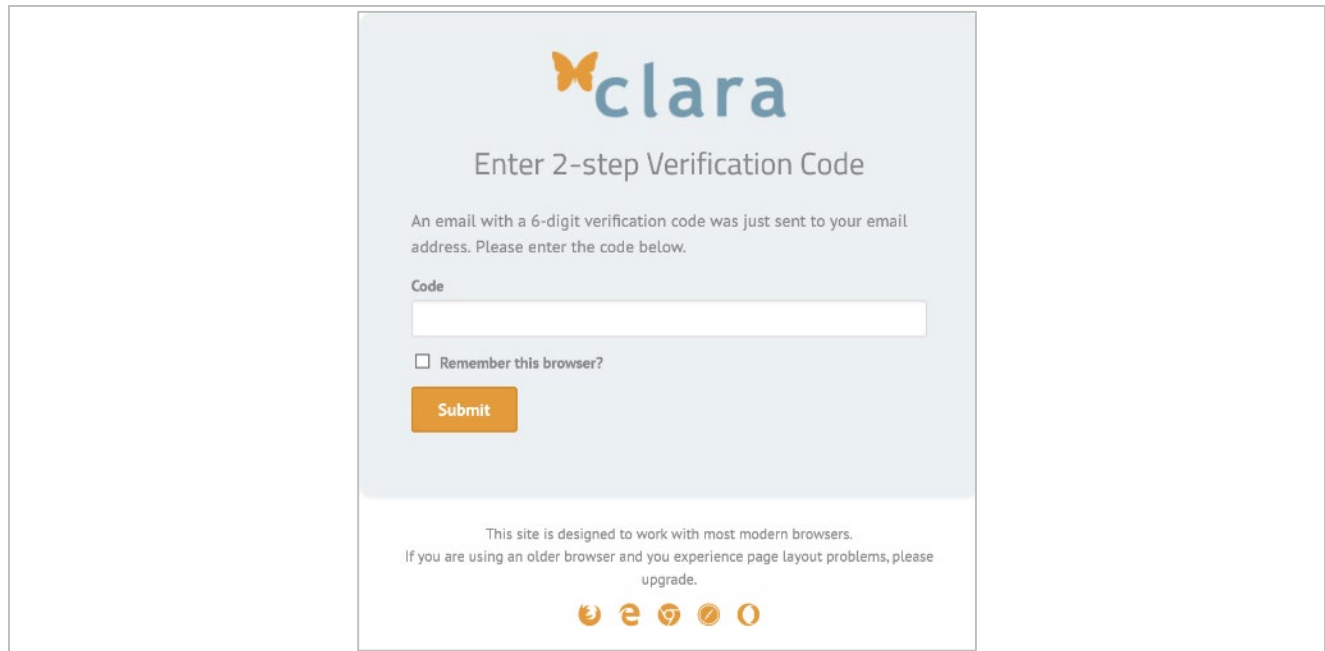


Figure 10: Enter 2-step Verification Code screen

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

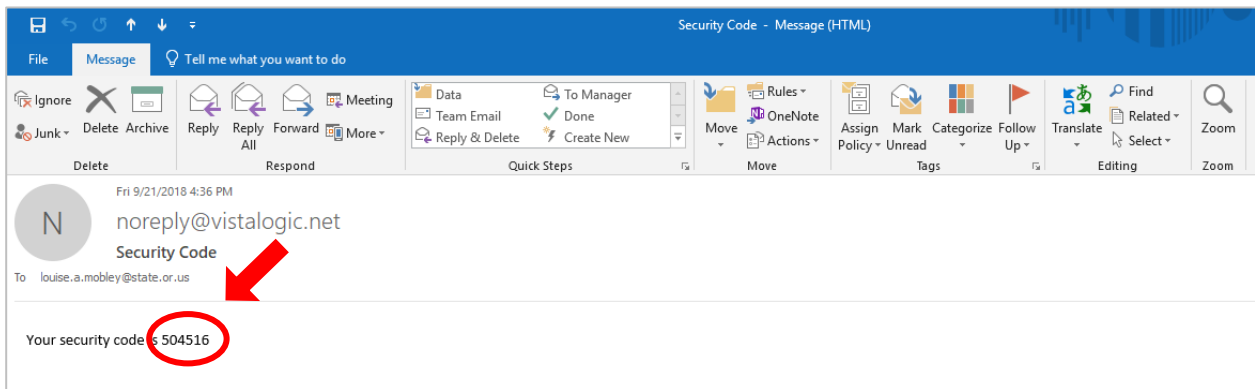


Figure 11: Security Code email

- 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.

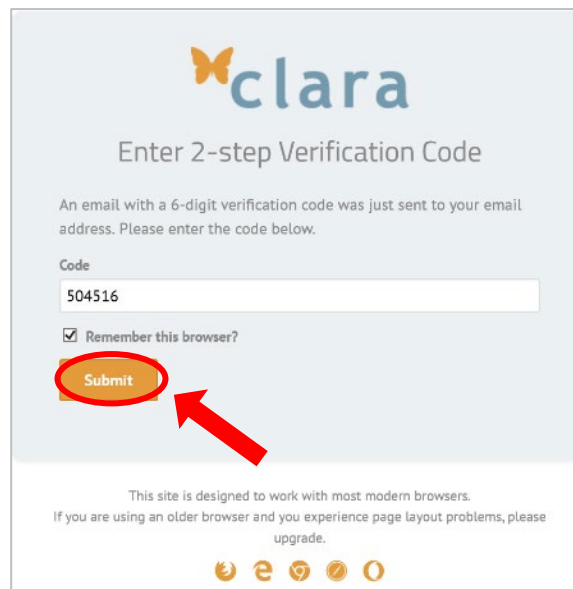


Figure 12: 2-step Verification Code

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

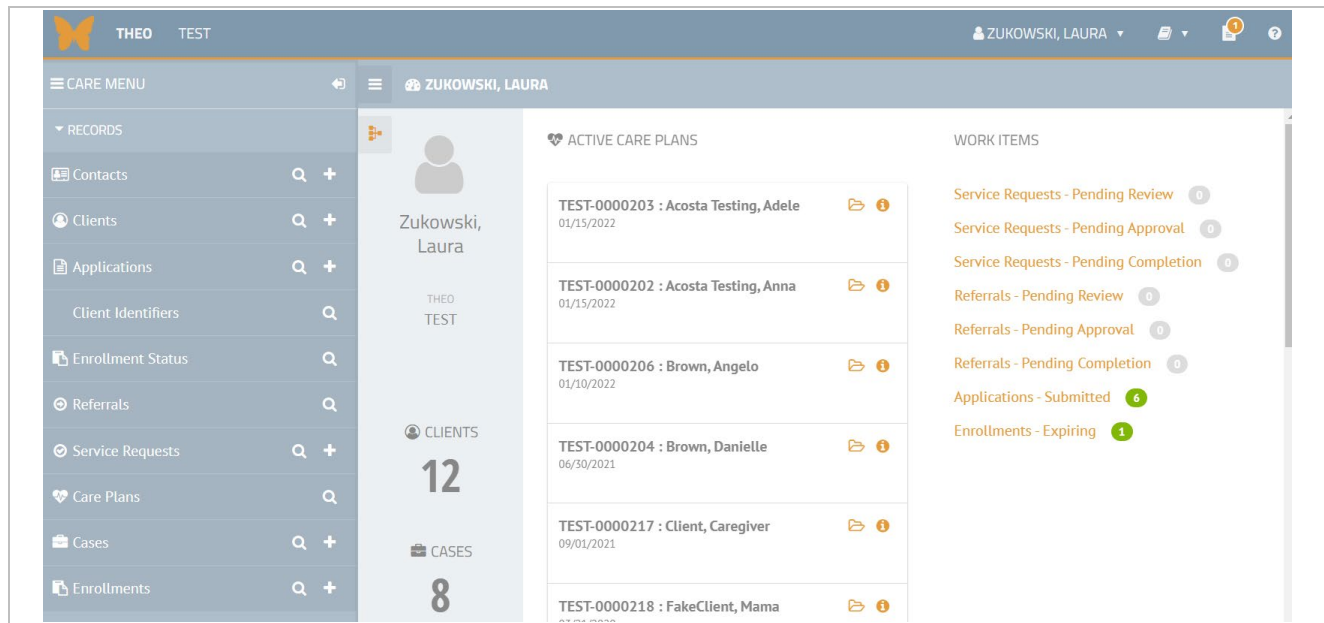


Figure 13: THEO Home Page

1.4.2 Reset 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@dhsosha.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).

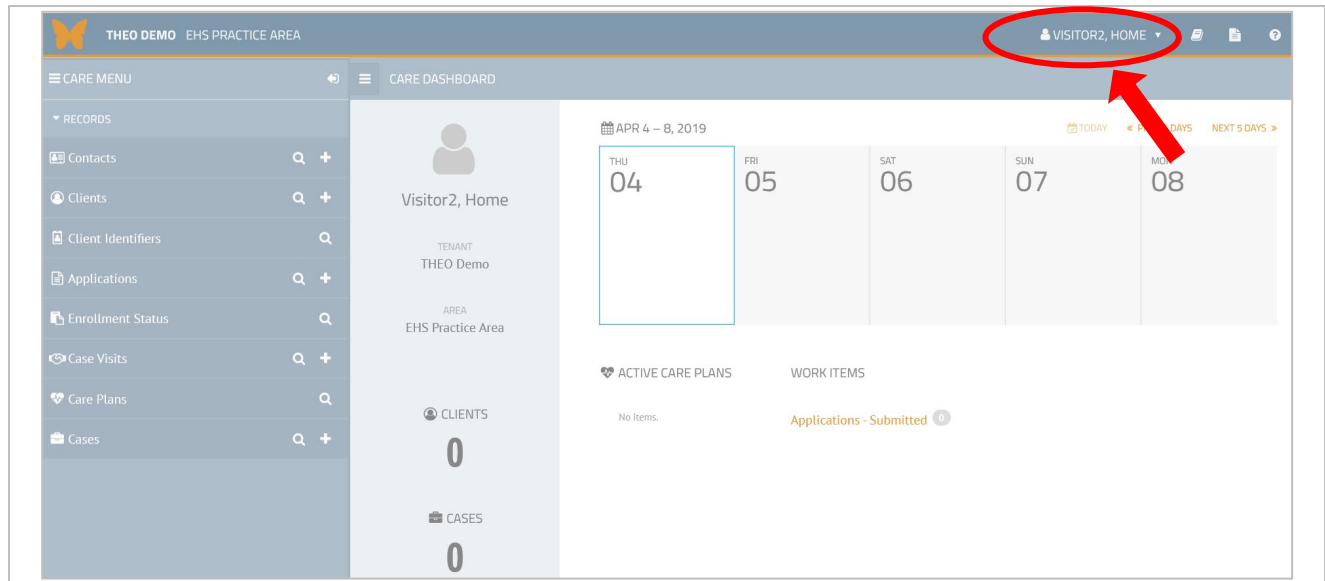


Figure 1: THEO Home Page

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

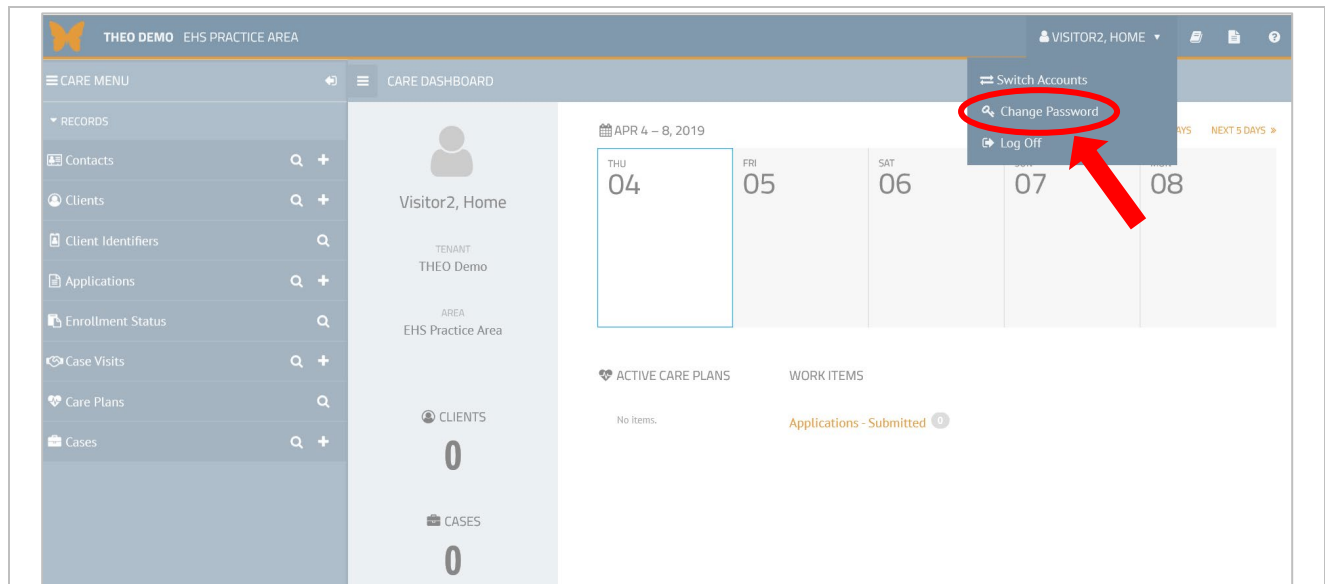


Figure 2: Change Password

- 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.
- Click on the orange Change Password button.

Figure 3: Change Password

- The THEO Home page 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: Home page 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.

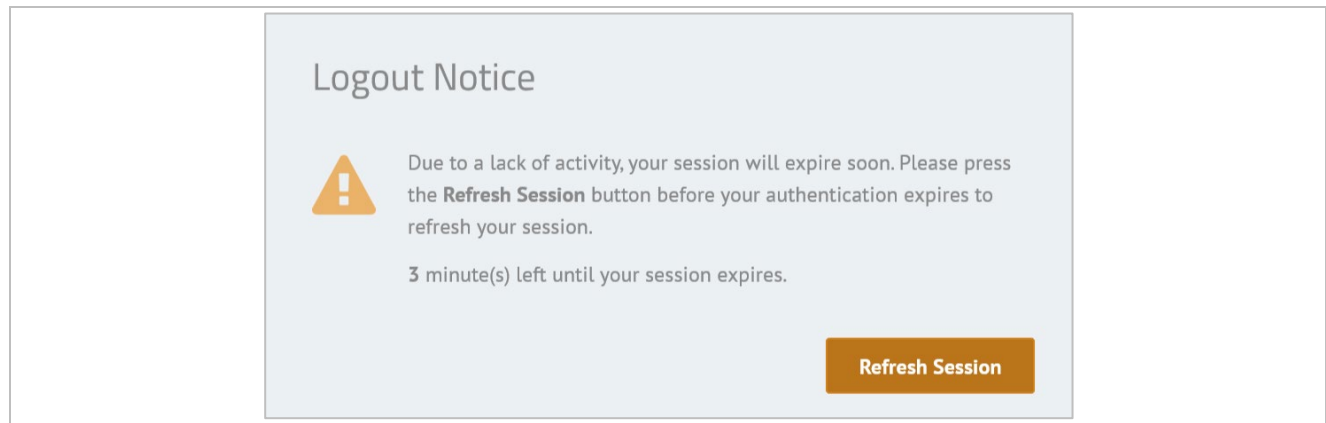


Figure 1: Logout Notice

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).

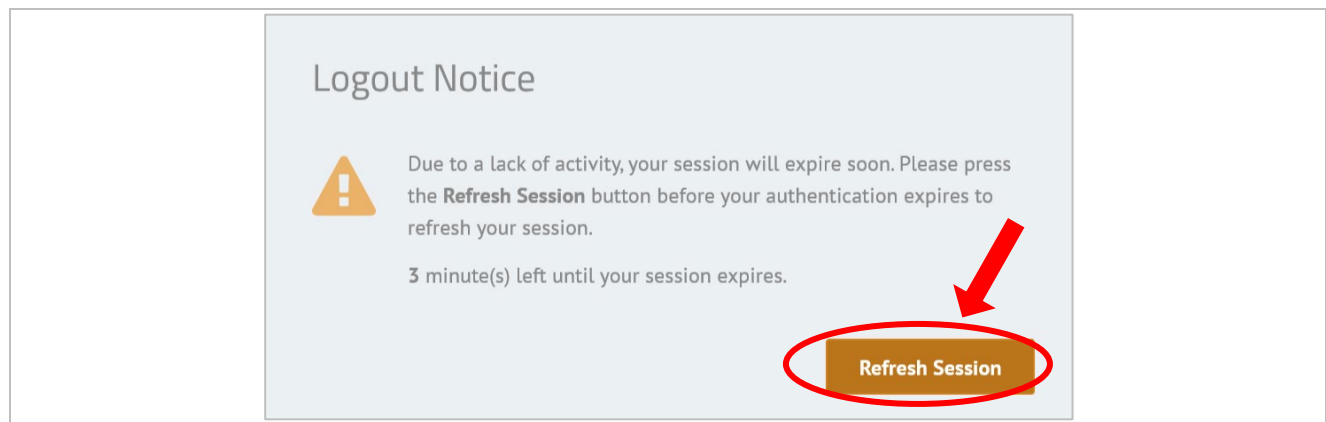


Figure 2: Logout Notice screen

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).

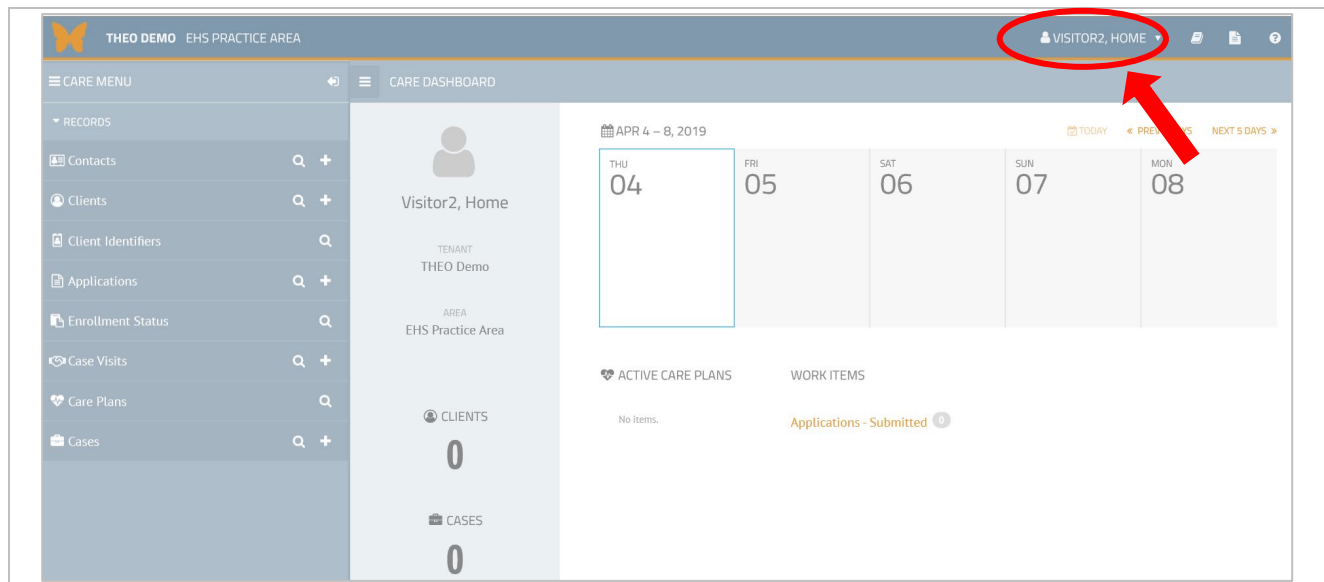


Figure 1: THEO Home Page – Link to log off (log out)

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

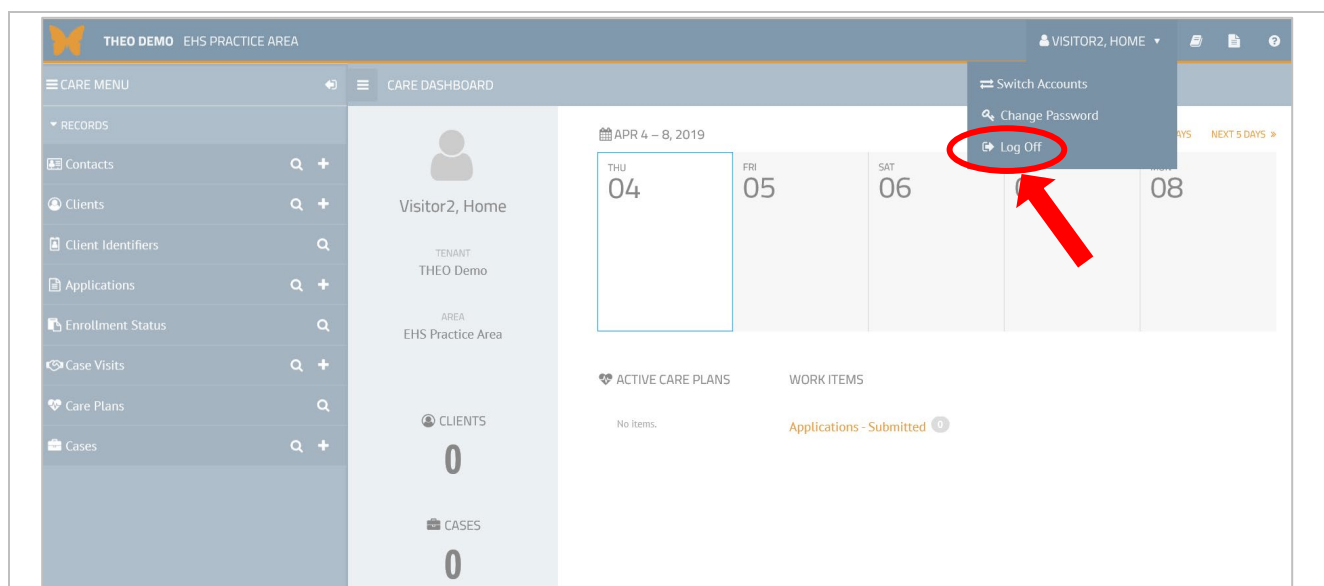


Figure 2: User Account – Log off (log out of THEO)

- 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 Home Page and Care Menu

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

2.1 THEO Home Page

Your THEO Home Page opens after you log in to THEO. What your home page 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 Home Page on a full-sized monitor. Note the list of clients currently assigned to Home Visitor (the "Active Care Plans"). Total number of clients and families (cases) display to the left of the Active Care Plans.

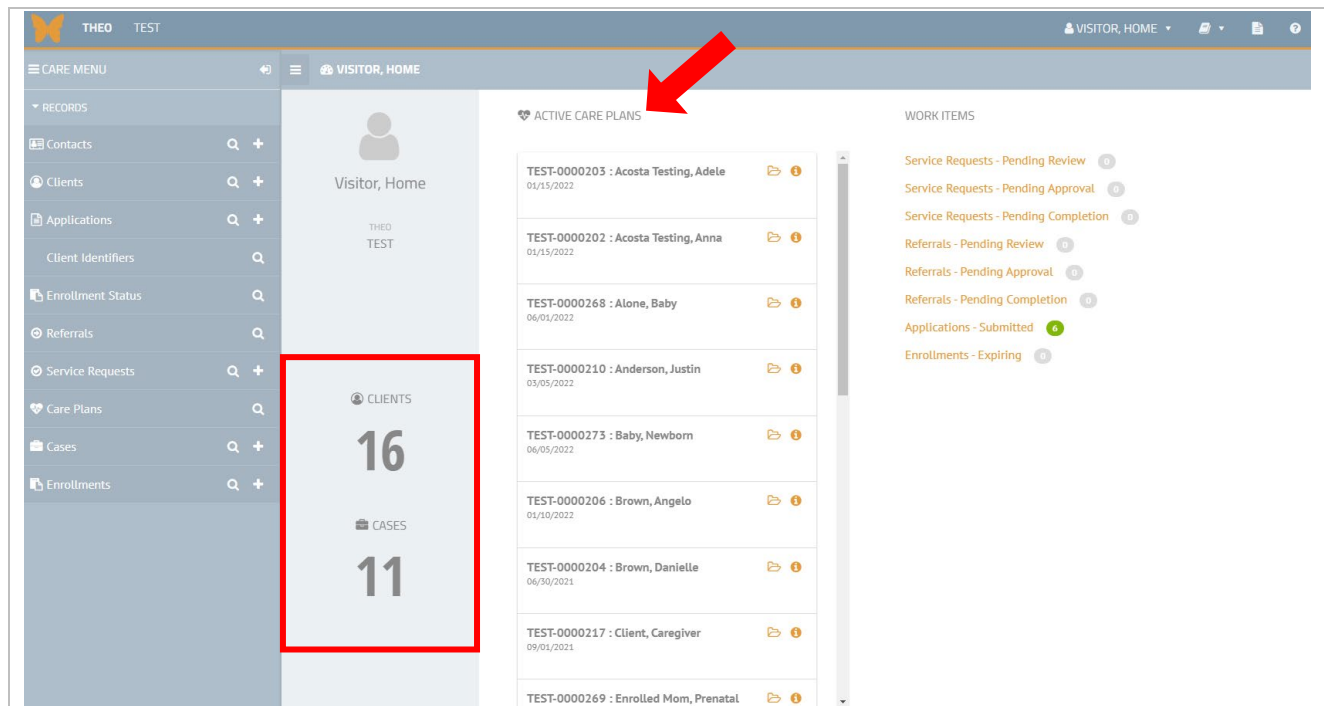


Figure 1: Home Page for a home visitor – Full-sized monitor displaying Active Care Plans

Figure 2 shows a Home Page 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 home visitors at your agency, who are assigned MIECHV families currently.

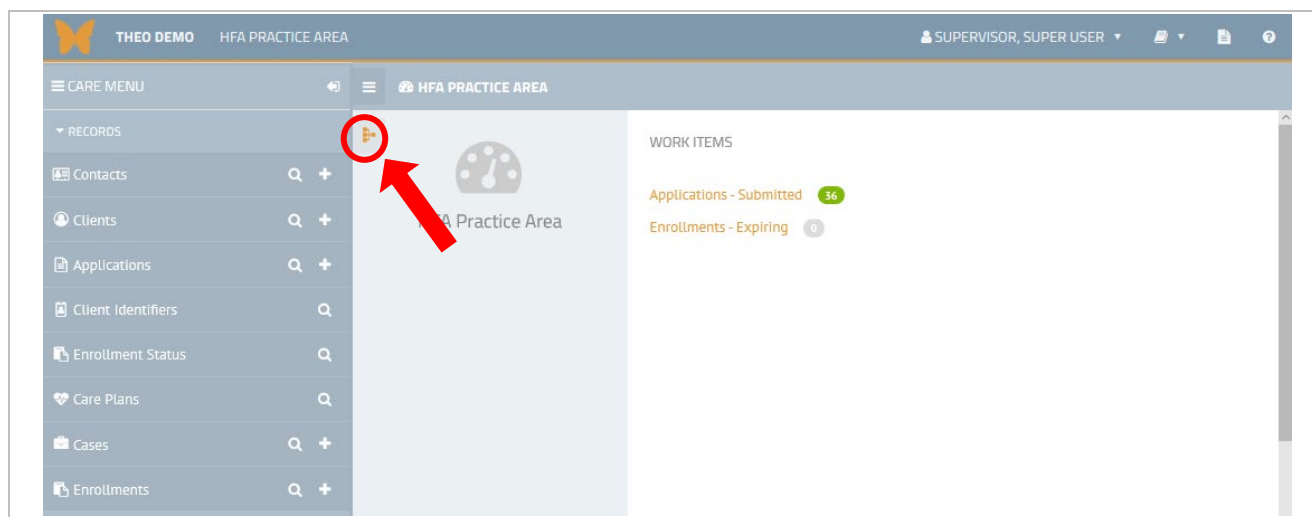


Figure 2: Home Page for a supervisor, super user, or data specialist - Full-sized monitor

A new panel opens on your screen with links to the Home Page for each home visitor at your agency. Counts of assigned clients and cases (i.e., families) display to the right of each home visitor's name (Figure 3).

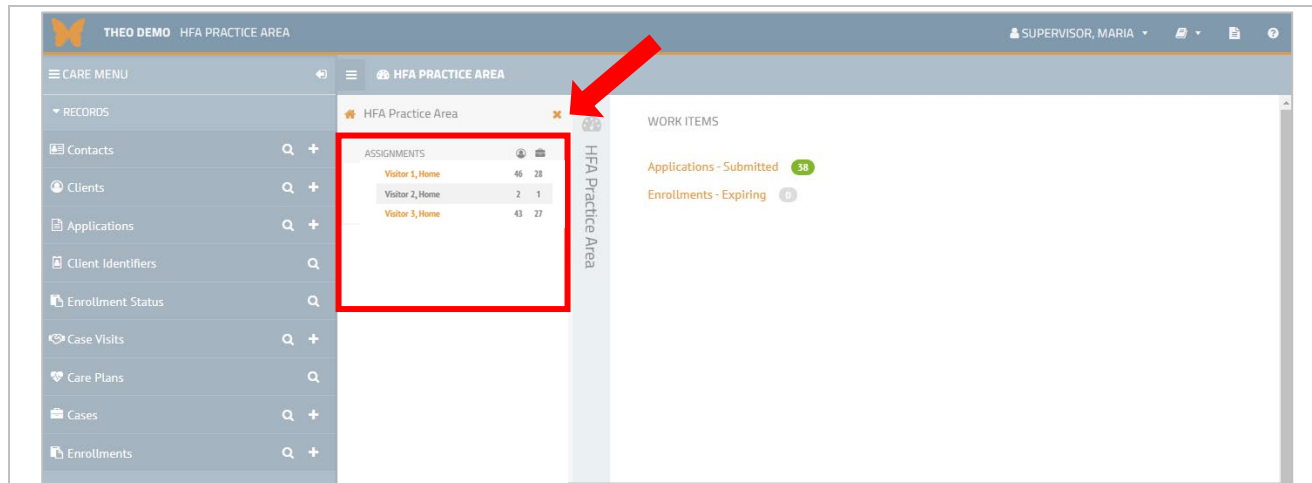


Figure 3: Links to the Home Page for each home visitor at your agency - Full-sized monitor

Clicking on a home visitor's name will make a list of their assigned current clients display, along with links to each client's Home Page, which THEO calls a Care Plan (Figure 4).

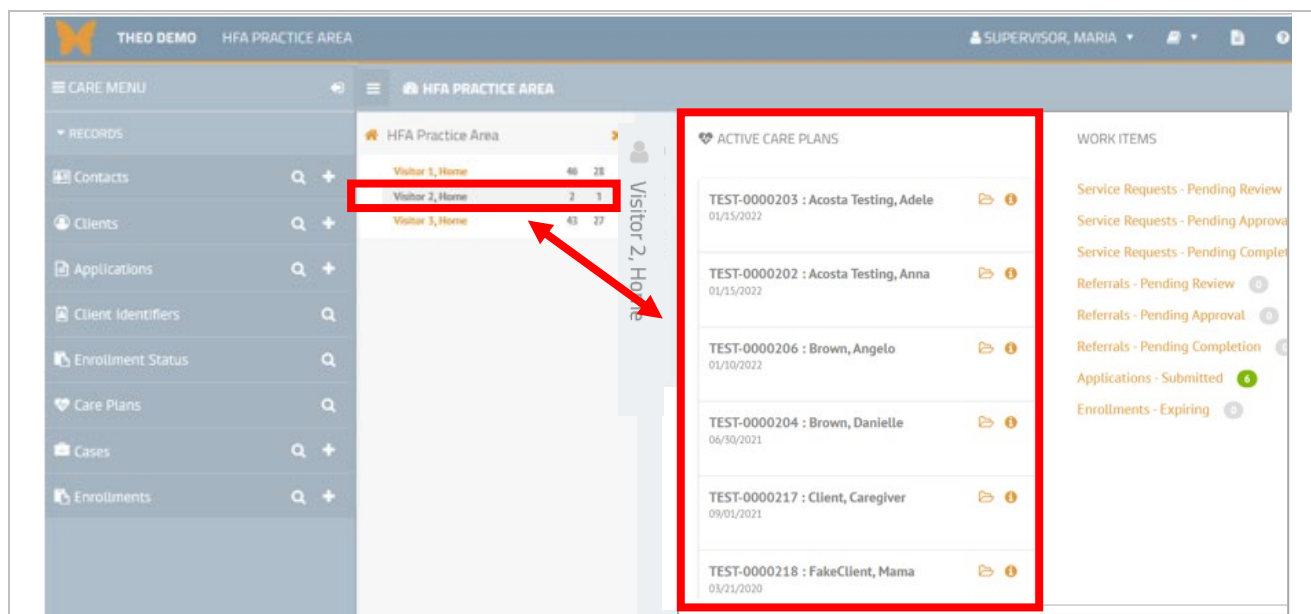


Figure 3: Home visitor's assigned caseload - Full-sized monitor

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") will change your cursor into a pointing hand

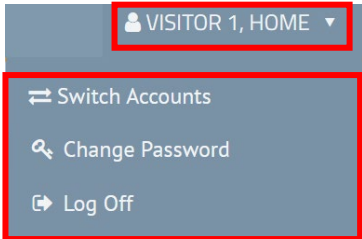





, and the name of the icon will appear near it. As icons appear in each section of this manual, we will describe them.

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 home page you see when you log in to THEO.
	Area within THEO	Shows the program and location where you work. Area refers to a home visiting program at a specific location.

Icon	Name	Description
	User Account	<p>Displays the name of the user who is logged in to THEO.</p> <p>Mouse over your name to open this menu, which has three options:</p> <ol style="list-style-type: none"> 1. Switch Accounts allows you to access data in another Area in THEO. Note: Some local users access only one Area in THEO and cannot switch accounts. 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 (MIECHV data entry forms) are available in the Resource Library.
	Files	<p>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.</p> <p>Files that you download from THEO also appear on the Files page.</p>
	Help & Support	Displays email address for THEO Application Support (theo.support@dhsosha.state.or.us) and the THEO website. Please email the application support team to request a secure email if you need to email confidential client information.

Icons on the THEO Navigation Bar will vary depending on where you are working in THEO, but two important icons that always appear on the Navigation Bar are 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).

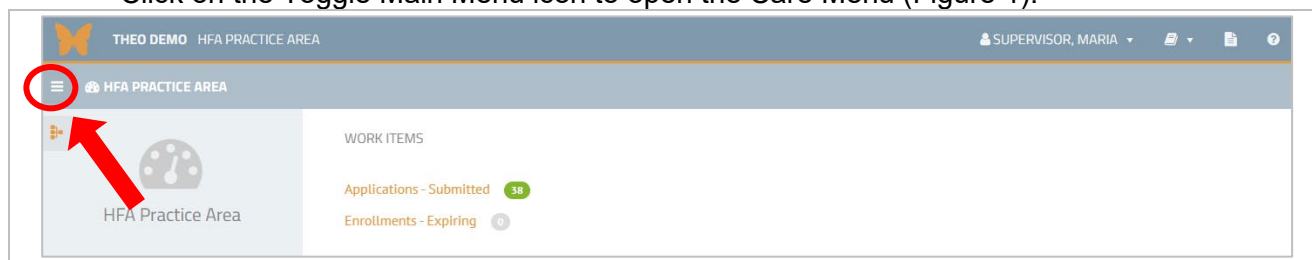




Figure 1: Toggle Main Menu icon (Care Menu closed)

- 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.

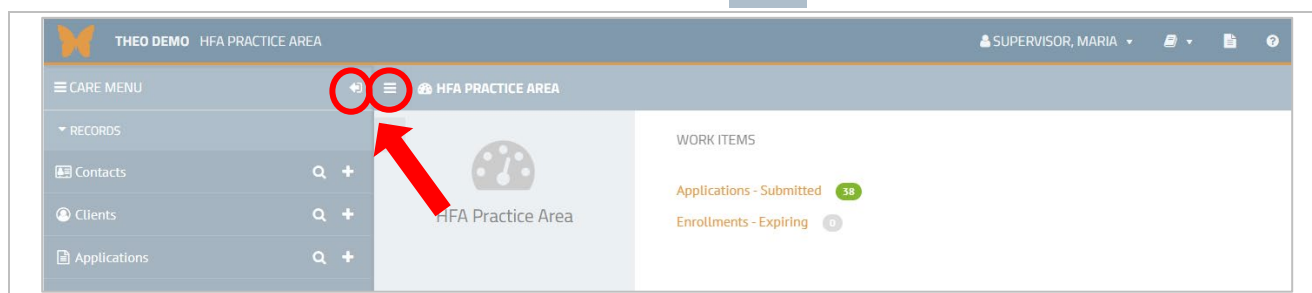


Figure 2: Toggle Main Menu icon and the Close Care Menu icon

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

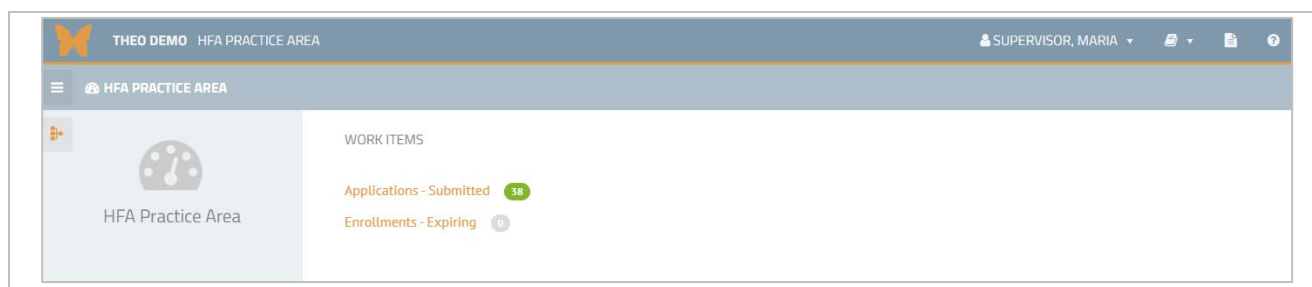


Figure 3: Home Page with closed Care Menu

2.3 Care Menu

The Care Menu, on the left side of your screen (Figure 1), includes links to other screens in THEO: Contacts; Clients; Applications; Client Identifiers; Enrollment Status; Case Visits; 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.

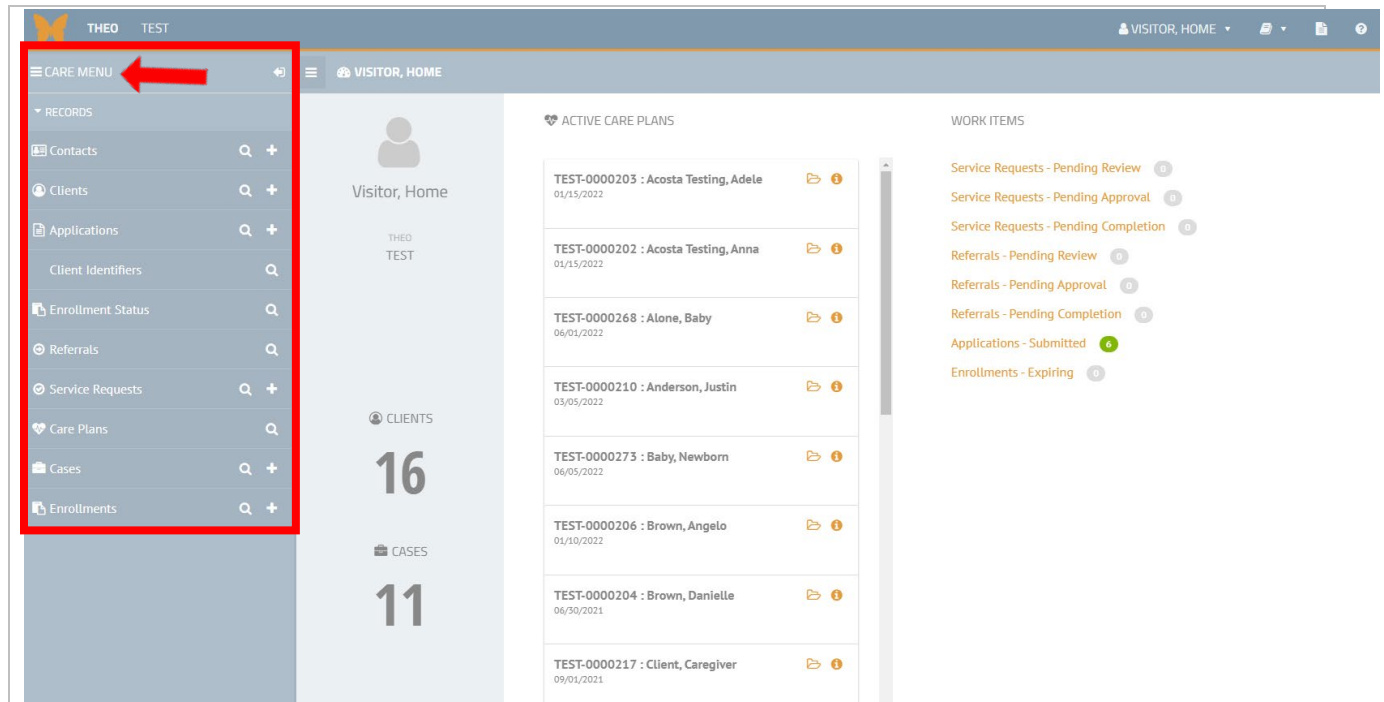













Figure 1: THEO Home Page – Care Menu

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	<p>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.</p> <p>Examples of other identifiers include driver's license number, medical record number, and identifiers from other databases used by local agencies.</p>
	Applications	Takes you to a list of all Applications, where you can search and filter the records.
	Enrollment Status	<p>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.</p> <p>Note: This screen allows you to view information about enrollments and applications <u>by all home visiting programs and agencies around the state</u>. This allows you to determine whether someone is currently enrolled in another home visiting program to avoid duplication of services.</p>
	Care Plans	Takes you to a search screen, where you can find all Care Plans for clients enrolled at your agency.
	Case Visits	Takes you to a list of all Visits for clients at your agency. You can search and filter the records.
	Cases	<p>Takes you to a search screen, where you can find all Cases at your agency.</p> <p>Note: A "case" refers to all people in a household or family who are enrolled together in the same home visiting program. In MIECHV programs, the case includes one index parent and one or more index children.</p>
	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 last step of the process, THEO creates several records and enrolls all clients on the Application.

The first Application for a family creates the family's Case, which includes a Care Plan for each member of the family who enrolled in the program together. The Case includes one Index Parent at a time and one or multiple Index Children. A home visitor is assigned to each Case and works with the enrolled members of the family.

Section 3.1 describes the process for enrolling an Index Parent with or without an Index Child (page [27](#)).

Section 3.2 describes the process for enrolling an Index Child after the Index Parent is already enrolled (page [34](#)).

Section 3.3 describes how to complete an enrollment by adding a Case Visit and Enrollment Survey to the client's Care Plan (page [36](#)). When enrolling a newborn after an Index Parent was enrolled prenatally, you will also update the Index Parent's pregnancy record (page [42](#)).

3.1 Index Parent Enrolls with or without an Index Child: Add New Application

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

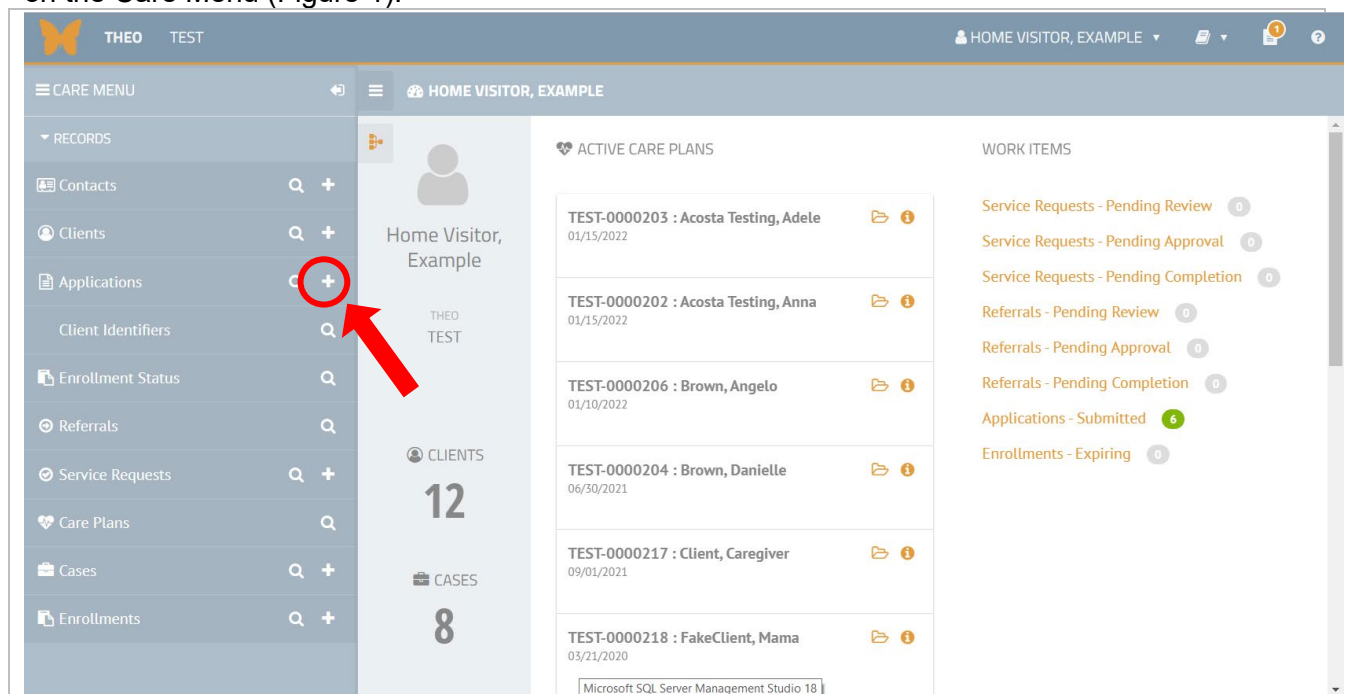


Figure 1: THEO Home Page – Add New Application

Add New Client Information screen opens (Figure 2).

- Enter the Index Parent's data in all required fields marked with an orange left border.
- Also enter the Primary Spoken Language (which is required for MIECHV reporting) and the Local Client ID (the ID number that your agency uses for the client).
- Click on the orange Save & Continue button.

CLIENT INTAKE

CLIENT ELIGIBILITY ENROLLMENT

Add New Client Information or Select an Existing Client

REQUIRED FIELDS

Last Name
Harris

First Name
Kamala

Middle Name

Prefix

Suffix

Also Known As

Save & Continue →

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 want to enter 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. Note: MIECHV does not require entry of a client's address, phone, or email.

- Uncheck Address, Phone, and Email if you're not entering data in these fields (Figure 3).
- Click orange Save & Continue button.

CLIENT INTAKE | PROGRAM | CLIENT | SCREENING | ELIGIBILITY | ENROLLMENT

Add New Client Information or Select an Existing Client

REQUIRED FIELDS

☐ Addresses

☐ Phone

☐ Email

Save & Continue

Figure 3: Add New Client Information - Uncheck Address, Phone, and/or Email checkbox

Client Intake opens (Figure 4).

- To add an Index Child to the Application, click on + Add Another Client and go to the next step to add the Index Child's information.
- To enroll a pregnant Index Parent alone, click on orange Continue button and then skip to the question (below) about whether the Index Parent is pregnant, page [32](#).

CLIENT INTAKE | CLIENT | ELIGIBILITY | ENROLLMENT

Harris, Kamala | Female | DOB: 01/03/1985 | 0003056

MIECHV Healthy Families Oregon | In Progress

Harris, Kamala

+ Add Another Client

Continue

Figure 4: Client Intake process (workflow)

Add New Client Information screen opens (Figure 5).

- Enter data about Index Child in all required fields, AND Primary Spoken Language and Local Client ID.
- Click on the orange Save & Continue button.

CLIENT INTAKE | CLIENT | ELIGIBILITY | ENROLLMENT

Harris, Kamala | Female | DOB: 01/03/1985 | 0003056

Add New Client Information or Select an Existing Client

REQUIRED FIELDS

Last Name: Harris

First Name: Baby

Middle Name:

Prefix:

Suffix:

Save & Continue | Cancel

Figure 5: Client Intake screen: Add Index Child to Parent's Application

Relationships screen opens.

- Click on the relationship types field to open the drop-down list (Figure 7).

CLIENT INTAKE | CLIENT | ELIGIBILITY | ENROLLMENT

Harris, Kamala | Female | DOB: 01/03/1985 | 0003056

Relationships

Please define relationships for Baby Harris

Baby Harris is [dropdown] to Kamala Harris

Primary Contact for Baby Harris

☒ Kamala Harris

Save & Continue | Cancel

Figure 7: Relationships screen

List of relationship types displays.

- Click on the relationship type to select it (Figure 8).
- Click on the orange Save & Continue button.

The screenshot shows the 'CLIENT INTAKE' screen with tabs for CLIENT, ELIGIBILITY, and ENROLLMENT. The client is 'Harris, Kamala', Female, DOB: 01/03/1985, ID: 0003056. The 'Relationships' section is active, with a prompt 'Please define relationships for Baby Harris'. A dropdown menu shows 'Baby Harris is' set to 'Child' and 'to Kamala Harris'. Below this, it says 'Primary Contact for Baby Harris' with a radio button selected for 'Kamala Harris'. At the bottom, the 'Save & Continue' button is highlighted with a red box and an arrow, and the 'Cancel' button is also visible.

Figure 8: Relationship types

Client Intake screen displays everyone on the Application and their relationships to one another (Figure 9).

- Click on the orange Continue button if there are no more Index Children to add.
- Or click on Add Another Client if there are more Index Children to add and repeat [steps](#) above.

The screenshot shows the 'CLIENT INTAKE' screen with tabs for CLIENT, ELIGIBILITY, and ENROLLMENT. The client is 'Harris, Kamala', Female, DOB: 01/03/1985, ID: 0003056. The 'MIECHV Healthy Families Oregon' section is active, with a status of 'In Progress'. It shows a list of clients: 'Harris, Kamala' (Mother of Harris, Baby) and 'Harris, Baby' (Daughter of Harris, Kamala). Below the list, the 'Add Another Client' button is highlighted with a red box and an arrow, and the 'Continue' button is also highlighted with a red box and an arrow.

Figure 9: Client Intake Application Summary

The Pregnancy Information screen opens (Figure 10).

- **If Index Parent IS Pregnant:** Check the checkbox and enter the Due Date and Number of Babies Expected.
- **If Index Parent IS NOT Pregnant:** Do not check the checkbox.
- Click on the orange Save & Continue button.

CLIENT INTAKE

CLIENT ELIGIBILITY ENROLLMENT

Harris, Kamala 1 additional Female | DOB: 01/03/1985 | 0003056

Pregnancy Information

Please indicate pregnancy status

☒ Kamala Harris is pregnant.

Due Date

6/1/2022

Number of Babies Expected

1

Save & Continue →

Figure 10: Client Intake - Pregnancy Information screen

The Eligibility summary opens (Figure 11).

- Click on the orange Save & Continue button.

CLIENT INTAKE

CLIENT ELIGIBILITY ENROLLMENT

Harris, Kamala 1 additional Female | DOB: 01/03/1985 | 0003056

MIECHV Healthy Families Oregon

Harris, Kamala Mother Apply Decline

Harris, Baby Daughter Apply Decline

Save & Continue →

Figure 11: Client Intake – Eligibility screen

Enrollment screen opens (Figure 12).

- Enter the Enrollment Start Date.
- Enter the home visitor in the Assigned To field.
- Click on the green Approve & Enroll button.

CLIENT INTAKE | CLIENT | ELIGIBILITY | ENROLLMENT

Harris, Kamala | Female | DOB: 01/03/1985 | 0003056

MIECHV Healthy Families Oregon

Harris, Kamala (Mother) | Submitted

Harris, Baby (Daughter) | Submitted

PROGRAM: MIECHV Healthy Families Oregon

Enrollment Start Date: 2/4/2022

Assigned To: Visitor, Home: HFO Test Area

Buttons: Approve & Enroll, Skip Enrollment

Figure 12: Client intake - Enrollment

The Application is completed. The Index Parent and Child are both “Enrolled” and each of them has a Care Plan (Figure 13). Complete each client’s enrollment by adding a Case Visit and a Client Survey to their Care Plan.

- Click on a client’s Open Care Plan button.
- See page 36 for instructions on how to add a [Case Visit](#) and [Client Survey](#) to a Care Plan.

CLIENT INTAKE | CLIENT | ELIGIBILITY | ENROLLMENT

Harris, Kamala | Female | DOB: 01/03/1985 | 0003056

MIECHV Healthy Families Oregon

Harris, Kamala (Mother) | Enrolled

Harris, Baby (Daughter) | Enrolled

Buttons: Open Care Plan, Close Client Intake

Clara logo

Figure 13: Enrolled screen

3.2 Another Client Enrolls AFTER the Index Parent: Add Member

You can enroll an Index Child into an existing Case from any other family member's Care Plan that is part of the Case. Once someone in a family has enrolled in a program, anyone else in the family who enrolls in the same program, can be added from another family member's Care Plan.

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

Open a Care Plan from the home visitor's Home Page by clicking on the Open icon (Figure 1).

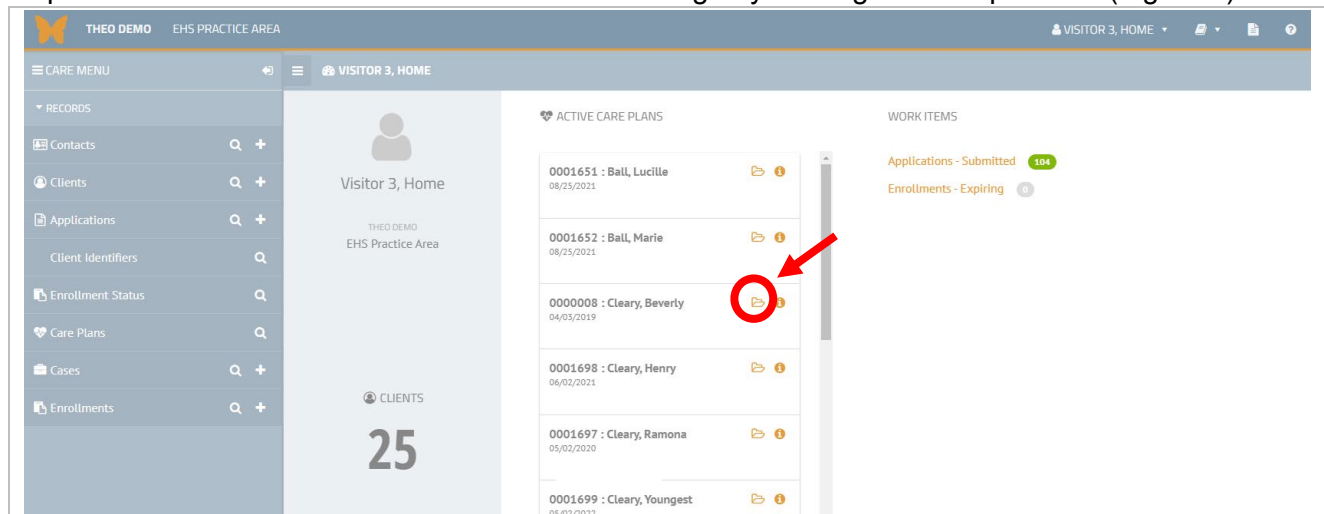


Figure 1: Open Care Plan icon on a home visitor's home page

Care Plan opens.

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

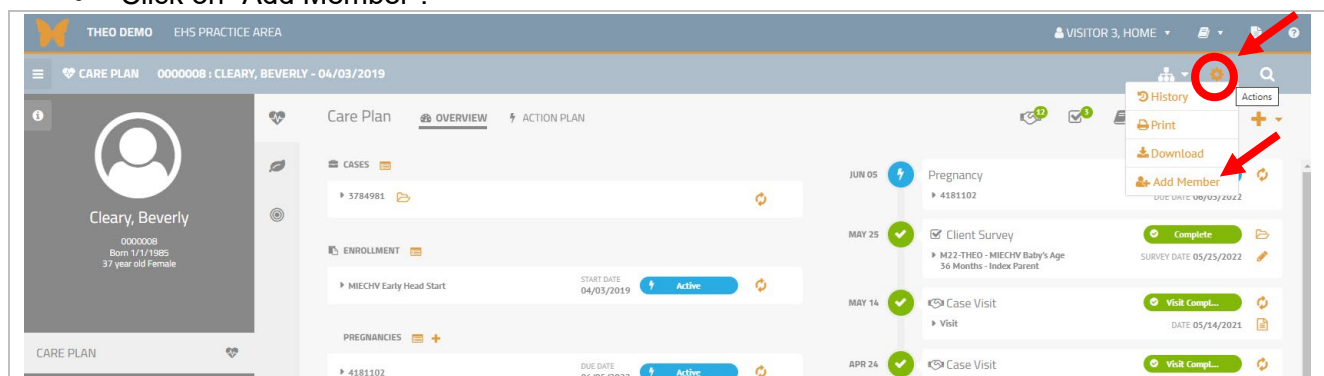


Figure 2: "Add Member" on the Actions menu

The Application workflow opens (Figure 3). The Index Parent, who enrolled previously, is listed automatically at the top of the Application.

- Enter the Index Child's information in the fields on the screen.
- Complete all required fields plus Primary Spoken Language and Local Client ID.
- Click on the orange Save & Continue button.

The screenshot shows the 'CLIENT INTAKE' application workflow. At the top, there are tabs for 'CLIENT', 'ELIGIBILITY', and 'ENROLLMENT'. Below the tabs, the client information for 'Williams, Test Mom' is displayed, including gender (Female), date of birth (01/05/1992), and a client ID (0002983). The main section is titled 'Add New Client Information' and includes a link to 'Select an Existing Client'. Below this, there is a section for 'REQUIRED FIELDS' with input boxes for Last Name, First Name, Middle Name, Prefix, and Suffix. A red arrow points to the 'Save & Continue' button at the bottom of the form.

Figure 3: Add New Client Information

Follow instructions (above) to add [Relationships](#) between the new client you are adding and other enrolled members of the family's Case. See page [30](#) and follow all steps for completing the Application. Add a [Case Visit](#) and Enrollment [Survey](#) to complete the new enrollment. When enrolling a newborn after an Index Parent, always update the Index Parent's pregnancy record with the birth. See page [42](#) for how to update the pregnancy record.

3.3 Enter a Case Visit and Client Survey

The Application process creates a Case for the family with a Care Plan for each client who enrolls. Adding a [Case Visit](#) and Enrollment [Survey](#) to each client's Care Plan completes their enrollment.

You also will add Case Visits and Surveys throughout a client's entire enrollment. Every visit with a client is recorded in THEO. Surveys are collected at enrollment and disenrollment, and also at other points in time, based on the MIECHV EHS/HFA Data Collection Schedule Tool –

https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/BABIES/HOMEVISITING/Documents/EHS_HFA_MIECHV_SCHEDULE_2020.xlsx

3.3.1 Case Visit

A visit is recorded in THEO for each enrolled client who was present during a visit. THEO allows you to add one Case Visit and check off the name of every client who was present. When you save the visit, THEO will add a separate Case Visit to the Care Plan of each client who was checked off as having been present at the Case Visit.

- From the Care Plan of the Index Parent or Child, mouse over the orange (+) New icon in the upper right corner (Figure 1).
- Menu opens. Click on Case Visit.

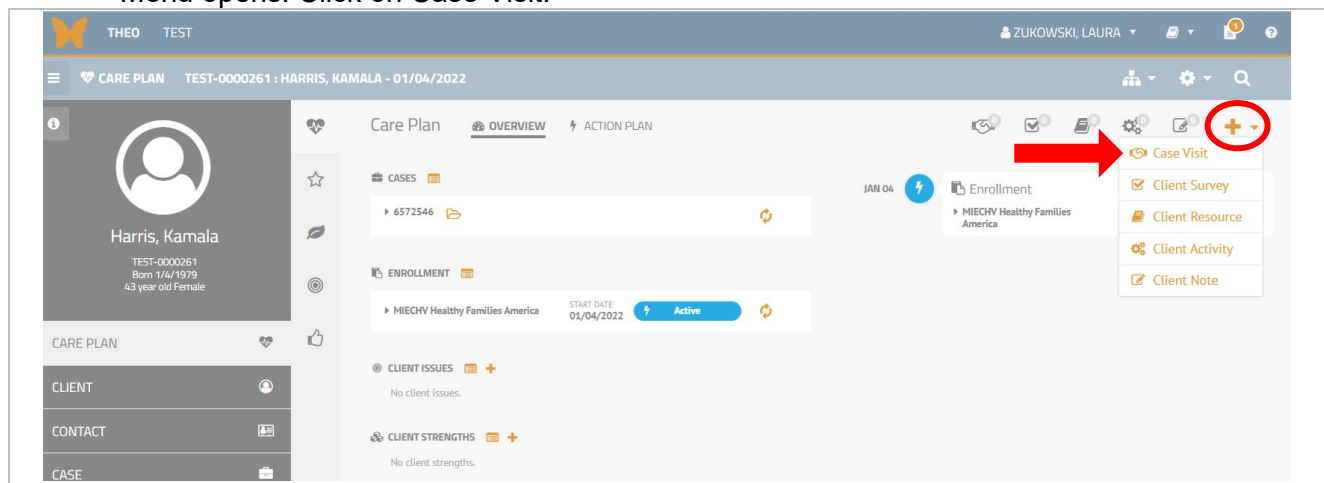


Figure 1: Orange (+) New icon menu

New Case Visit opens (Figure 2).

- Everyone currently enrolled in the family's Case is listed at the top of the Case Visit under "Clients" (Note: Disenrolled clients do not display).
 - Leave a checkmark next to the name of anyone who attended the visit.
 - Uncheck the checkbox next to the name of anyone who did not attend the visit.
- Enter date of visit in Date, Status ("Visit Completed" or "Visit Not Completed"), and home visitor who attended the visit. Note: MIECHV requires only **completed** visits to be entered.
- Click on the orange Save & Continue button.

The screenshot shows the 'New Case Visit' form. It includes sections for 'REQUIRED FIELDS', 'Clients', 'Case', 'Type', 'Date', 'Time (hh:mm)', and 'Home Visitor'. The 'Clients' section lists 'Harris, Baby' and 'Harris, Kamala' with checked boxes. The 'Case' field contains '6572546'. The 'Type' dropdown is set to 'Visit'. The 'Date' field is empty. The 'Time (hh:mm)' field is empty. The 'Home Visitor' dropdown is set to 'Zukowski, Laura'. The 'Save & Continue' button is highlighted with a red box and a red arrow.

Figure 2: New Case Visit

Case Visit Encounter opens (Figure 3).

- Enter Visit Method and whether the parent was asked if they had any concerns.
- Click on orange Save & Continue button.

Case Visit Encounter 1 of 1

Page 1

Visit Method:

If Other, please specify:

Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?

☐ Yes, the question was asked

☐ No, the question was not asked

Save & Continue → Cancel

Figure 3: Case Visit Encounter

Case Visit Encounter closes and Client's Care Plan opens (Figure 4).

- New Case Visit displays in the client's Activity Timeline.

THEO TEST

ZUKOWSKI, LAURA

CARE PLAN TEST-0000261 : HARRIS, KAMALA - 01/04/2022

Harris, Kamala
TEST-0000261
Born 1/4/1973
43 year old Female

CARE PLAN

CLIENT

CONTACT

CASE

MIECHV Healthy Families America - 01/04/2022
Harris, Kamala

Care Plan OVERVIEW ACTION PLAN

CASES

6572546

ENROLLMENT

MIECHV Healthy Families America START DATE 01/04/2022 Active

CLIENT ISSUES

No client issues.

CLIENT STRENGTHS

No client strengths.

CLIENT RISKS

No client risks.

MAR 31 Client Survey Complete SURVEY DATE 03/31/2022

JAN 04 Case Visit Visit Complete DATE 01/04/2022

JAN 04 Enrollment Active START DATE 01/04/2022

Figure 4: New Case Visit in the client's Activity Timeline

3.3.2 Client Survey

A Client Survey is completed with clients at enrollment and at disenrollment. Surveys also are collected at other times, based on the MIECHV EHS/HFA Data Collection Schedule Tool – https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/BABIES/HOMEVISITING/Documents/EHS_HFA_MIECHV_SCHEDULE_2020.xlsx

From any client's Care Plan, mouse over the New (+) icon in the upper right of the screen (Figure 1).

- Menu opens. Click on Client Survey.

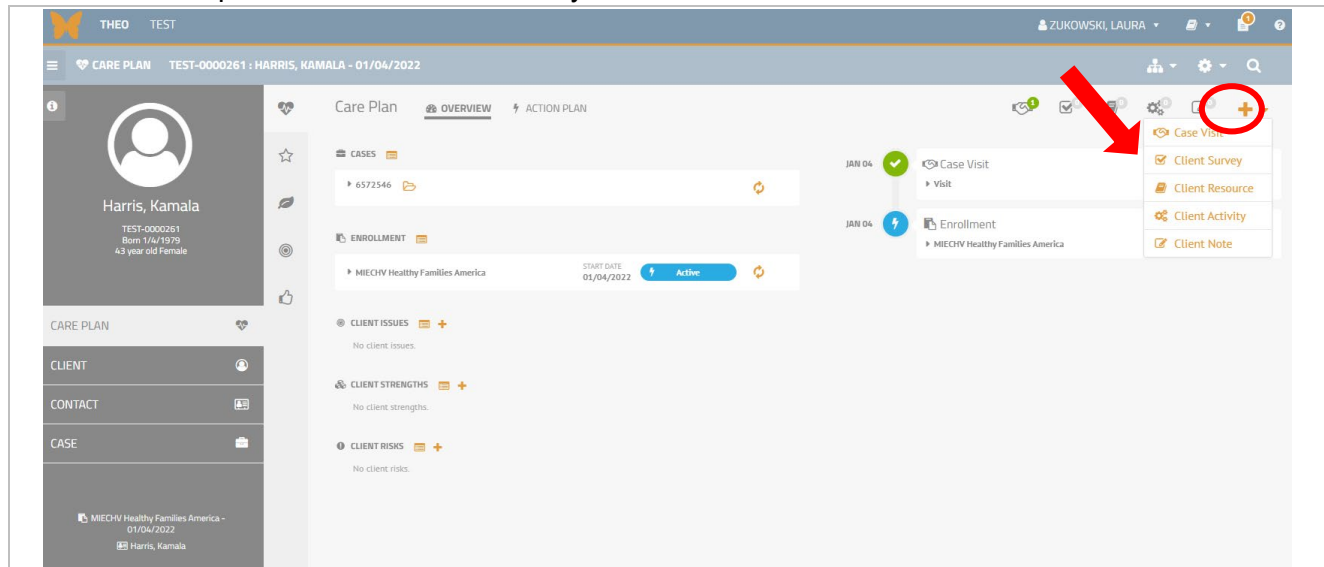


Figure 1: New (+) icon and menu

Select Survey opens (Figure 2).

- Click on the survey and the orange Save & Continue button.

The screenshot shows the 'SELECT SURVEY' step in a client survey process. The client is Harris, Kamala, a female born 01/04/1979. The 'Select Survey' section lists 16 options, including various MIECHV Baby's Age surveys (M11-THEO to M8) and enrollment tools. At the bottom, a red arrow points to the 'Save & Continue' button.

Figure 2: Select Survey

Edit Existing Client Survey Information opens (Figure 3).

- Enter the Survey Date and the home visitor who completed the survey.
- Click on the orange Save & Continue button.

The screenshot shows the 'Edit Existing Client Survey Information' screen. The client is Harris, Kamala. The survey details include: Survey Number 6572572, Client TEST-0000261 : Harris, Kamala, Survey Type M1-THEO - MIECHV Enrollment - Index Parent, Survey Date (MM/DD/YYYY), Status Pending, Status Date 5/18/2022, Completed By Zukowski, Laura : TEST, and Area TEST. A red arrow points to the 'Save & Continue' button at the bottom.

Figure 3: Edit Existing Client Survey Information

- Next screen, with survey questions, opens (Figure 4).
- Answer all questions, which are appropriate for the client according to instructions on each question.
- Click on orange Save & Continue button(s) until finished entering data on all survey pages.

CLIENT SURVEY | CLIENT | SELECT SURVEY | CLIENT SURVEY | INFORMATION

Harris, Kamala | Female | DOB: 01/04/1979 | TEST-0000261

M1 - MIECHV Enrollment - Index Parent_20181101 | 3 of 3

Questions about Index Parent

3. Marital Status:

- ☐ Single / Never Married
- ☐ Married
- ☐ Separated / Divorced / Widowed
- ☐ Not Married but living together with partner

4. Relationship to Index Child:

- ☐ Biological mother
- ☐ Biological father
- ☐ Other caregiver

5. Index Parent's Current Health Insurance status:

Please check all that apply:

- ☐ Not insured
- ☐ Private or employer's insurance
- ☐ OHP / Medicaid
- ☐ CAWEM / CAWEM Plus

Save & Continue | Cancel

Figure 4: Survey Questions and orange Save & Continue button

Survey closes after last page of survey is saved, and Client's Care Plan opens (Figure 5).

- New completed survey displays on the client's Activity Timeline.

CARE PLAN | THEO | TEST | ZUKOWSKI, LAURA

TEST-0000261 : HARRIS, KAMALA - 01/04/2022

Harris, Kamala | TEST-0000261 | Born 1/4/1979 | 43 year old Female

CARE PLAN

- CLIENT
- CONTACT
- CASE

Care Plan | OVERVIEW | ACTION PLAN

CASES

- 6572546

ENROLLMENT

- MIECHV Healthy Families America | START DATE 01/04/2022 | Active

CLIENT ISSUES

- No client issues.

CLIENT STRENGTHS

- No client strengths.

CLIENT RISKS

- No client risks.

Activity Timeline

- MAR 31 | Client Survey | Complete | SURVEY DATE 05/31/2022
- JAN 04 | Case Visit | Visit Complete | DATE 01/04/2022
- JAN 04 | Enrollment | Active | START DATE 01/04/2022

Figure 5: Client Survey added to the client's Activity Timeline

Data Entry Tips for Surveys

- All fields with an orange border on the left side of the field are required. You must enter data in these fields before THEO will allow you to save your data entry.
- Field types on surveys include:
 - Radio button fields (circles). Select one response by clicking on it. A black dot appears in the radio button for the response. Remove your selection by clicking on the radio button again. The black dot disappears from the radio button.
 - Checkbox fields. Click on one or more checkboxes to select or check them. Click again on the checkbox to remove the checkmark.
 - Date fields. Enter dates in this format: MM/DD/YYYY.
 - Free text fields. Type in the white text box, which will expand if your entry is long.
 - Number fields. Enter the number (for example, 0, 1, 5, 1.5, or 2.25). Some fields allow a decimal point and up to two numbers to the right of the decimal point (for example, 1.75 or 2.99). Some number fields do not allow a decimal point (99 or 2,000,000).
- Be sure to scroll all the way to the bottom of each survey page to answer all questions that are appropriate for the client.
- After entering data, click on the orange Save & Continue button at the bottom of the page to save your data entry and continue to the next screen until the survey is completed and closes.
- Click on the orange Save & Finish Later button to save the data you have entered and complete the survey in the future.

3.3.3 Update the Index Parent's pregnancy record when enrolling the newborn

Always update an Index Parent's pregnancy record after a pregnancy ends or when you enroll the Index Parent'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).

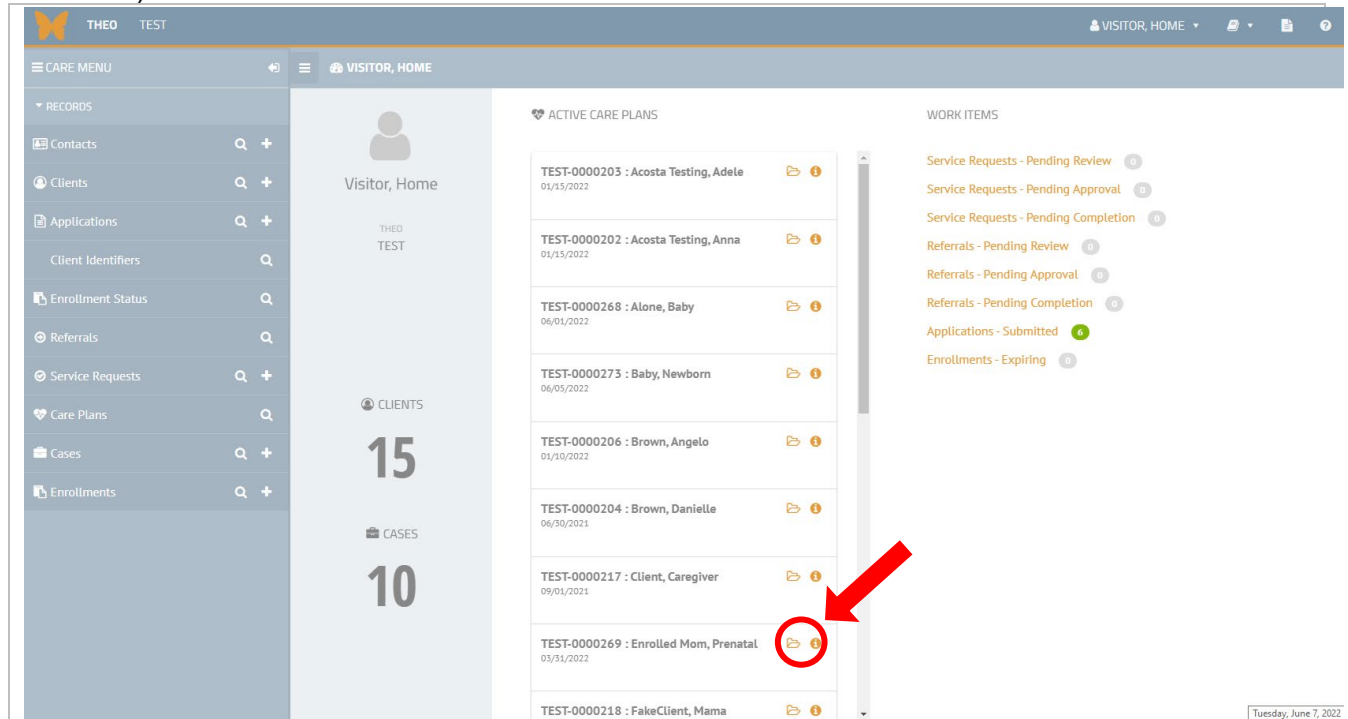


Figure 1: Open a client's Care Plan

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.

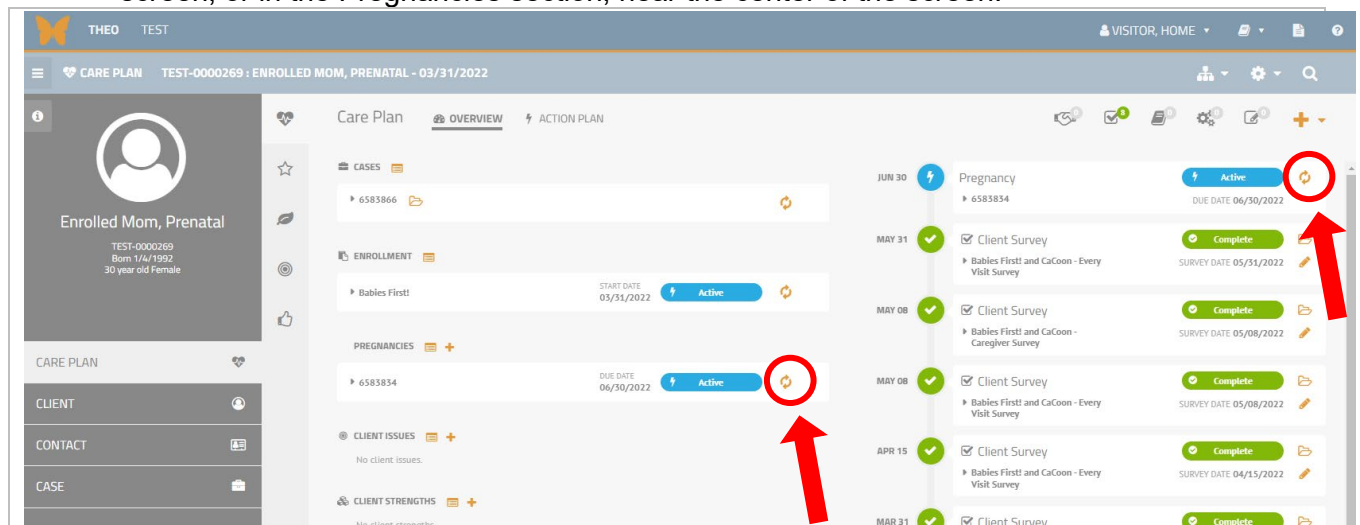


Figure 2: Update Pregnancy icons in the Pregnancies section and the Activities Timeline

3. Pregnancy record opens (Figure 3).

- Enter the Birth Outcome and the Birth / End Date
- Click on the orange Update & Close button.

Pregnancy

6583834 - 06/30/2022

PERSON	PREGNANCY	DUE DATE	NUMBER OF BABIES EXPECTED	BIRTH OUTCOME	BIRTH/END DATE
Enrolled Mom, Prenatal : 6583824	6583834	6/30/2022	1	--	--

REQUIRED FIELDS

Due Date
6/30/2022

Number of Babies Expected
1

Birth Outcome
[dropdown menu]

Birth/End Date
MM/DD/YYYY

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

Update & Close Cancel Edit

Figure 3: Pregnancy record

4. Pregnancy record closes and you are back on the caregiver's Care Plan (Figure 4).

- Pregnancy record shows "Complete" status in the Activities Timeline and Pregnancies section.
- Pregnancy Outcome has been created and displays in both the Activities Timeline and in the Pregnancies section.

CARE PLAN TEST

TEST-000269 : ENROLLED MOM, PRENATAL - 03/31/2022

Enrolled Mom, Prenatal
TEST-000269
Born 1/4/1992
30 year old Female

CARE PLAN

CLIENT

CONTACT

CASE

Care Plan OVERVIEW ACTION PLAN

CASES

6583866

ENROLLMENT

Babies First! START DATE 03/31/2022 Active

PREGNANCIES

6583834 Live Birth BIRTH/END DATE 06/07/2022 Complete

PREGNANCY OUTCOMES

6583834 1 BIRTH/END DATE 06/07/2022 Live Birth

CLIENT ISSUES

No client issues.

Activities Timeline

JUN 07 Pregnancy Outcome 6583834 1 Live Birth BIRTH/END DATE 06/07/2022

JUN 07 Pregnancy 6583834 Live Birth Complete BIRTH/END DATE 06/07/2022

MAY 31 Client Survey Babies First! and CaCoon - Every Visit Survey Complete SURVEY DATE 05/31/2022

MAY 08 Client Survey Babies First! and CaCoon - Caregiver Survey Complete SURVEY DATE 05/08/2022

MAY 08 Client Survey Babies First! and CaCoon - Every Visit Survey Complete SURVEY DATE 05/08/2022

APR 15 Client Survey Babies First! and CaCoon - Every Visit Survey Complete SURVEY DATE 04/15/2022

Figure 4: Pregnancies and Pregnancy Outcomes

4.0 Disenrollment

THEO records disenrollment data for both the Index Parent and Index Child. Add an M47 Exit Survey, a final Case Visit (if one occurred), and an Enrollment End Date to complete the disenrollment.

4.1 Disenrollment Survey – M47-THEO-MIECHV Program Exit

The M47-THEO – MIECHV Program Exit – Index Parent & Index Child Survey captures the end date of enrollment and reason for disenrollment. Be sure to add an M47 exit survey to the Care Plan of every client who disenrolls.

- From the client's Care Plan, mouse over the New (+) icon in the upper right corner to open the Actions menu. Click on Client Survey (Figure 1).

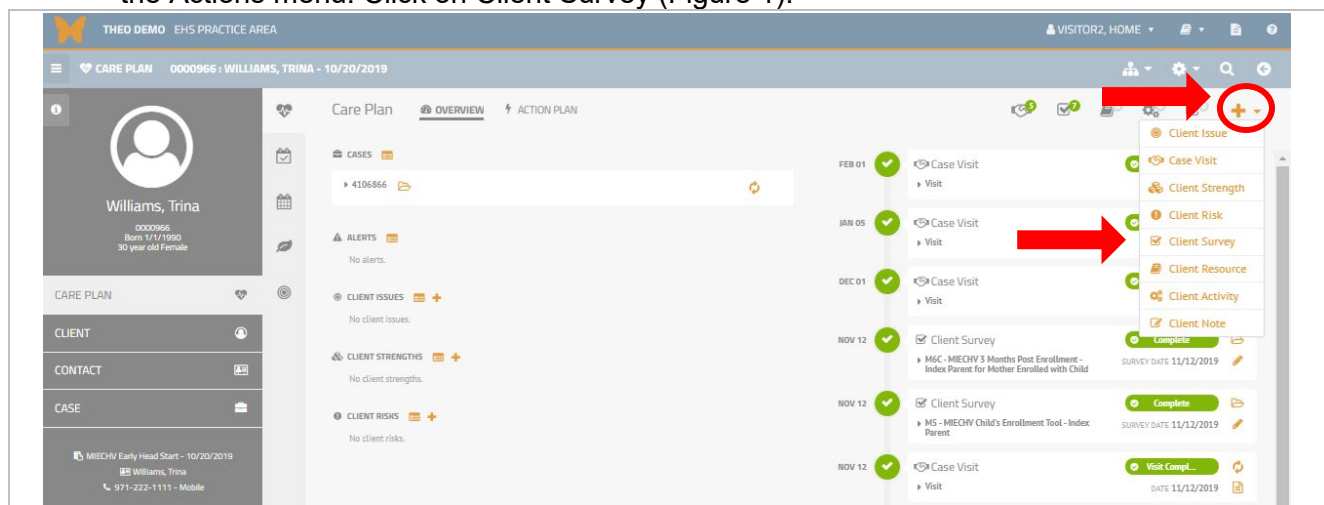


Figure 1: Select Client Survey on the New (+) drop-down menu

- Select Survey window opens (Figure 2).
 - Click on M47-THEO – MIECHV Program Exit – Index Parent & Index Child survey to select it.
 - Click on the orange Save & Continue button.

CLIENT SURVEY | CLIENT | SELECT SURVEY | CLIENT SURVEY | INFORMATION

Williams, Trina | Female | DOB: 01/01/1990 | 0000966

Select Survey

- ☐ M11-THEO - MIECHV Baby's Age 12 Months - Index Parent
- ☐ M13-THEO - MIECHV Baby's Age 18 Months - Index Parent
- ☐ M16-THEO - MIECHV Baby's Age 24 Months - Index Parent
- ☐ M19-THEO - MIECHV Baby's Age 30 Months - Index Parent
- ☐ M1-THEO - MIECHV Enrollment - Index Parent
- ☐ M22-THEO - MIECHV Baby's Age 36 Months - Index Parent
- ☐ M2B - MIECHV Referrals Tracking & Follow-Up - Index Parent
- ☐ M3 - MIECHV Enrollment Tool - Index Parent
- ☒ M47-THEO - MIECHV Program Exit - Index Parent & Index Child
- ☐ M5 - MIECHV Child's Enrollment Tool - Index Parent
- ☐ M6C - MIECHV 3 Months Post Enrollment - Index Parent for Mother Enrolled with Child
- ☐ M6P - MIECHV Baby's Age 3 Months - Index Parent for Mother Enrolled Prenatally
- ☐ M8 - MIECHV Baby's Age 6 Months - Index Parent

Save & Continue

Figure 2: Select M47-THEO-MIECHV Program Exit survey

- The Edit Existing Client Survey Information window opens (Figure 3).
 - Enter the Enrollment End Date in the Survey Date field.
 - Verify the home visitor's name appears in the Completed By field.
 - Click on orange Save & Continue button.

CLIENT SURVEY | CLIENT | SELECT SURVEY | CLIENT SURVEY | INFORMATION

Williams, Trina | Female | DOB: 01/01/1990 | 0000966

Edit Existing Client Survey Information

Survey ID
4109354

Client
0000966 : Williams, Trina

Survey Type
M47-THEO - MIECHV Program Exit - Index Parent & Index Child

Survey Date
2/1/2020

Status
Pending

Status Date
3/19/2020

Completed By
Visitor2, Home : EHS Practice Area

Save & Continue

Figure 3: Edit Existing Client Survey Information

- The M47-THEO – MIECHV Program Exit – Index Parent & Index Child survey opens (Figure 4).
 - Select Reason for Program Exit.
 - If “Terminated services” is selected in Reason for Program Exit, also select an answer in Question 1a regarding why services were terminated.
 - Click on the orange Save & Continue button.

CLIENT SURVEY

Williams, Trina

Female | DOB: 01/01/1990 | 0000966

M47-THEO - MIECHV Program Exit - Index Parent & Index Child

Page 1

1. Reason for Program Exit:

☐ Successfully completed program

☒ Terminated services

1a. If Terminated services, Reason:

☒ Client returned to work or school

☐ Client received what they need from the program

☐ Client is receiving services from another program

☐ Moved out of service area

☐ Unable to locate or contact

☐ Excessive missed appointments/attempted visits

☐ Refused new Home Visitor

☐ Dissatisfied with program

Save & Continue

Cancel

Figure 4: M47-THEO – MIECHV Program Exit – Index Parent & Index Child screen

- Survey closes and client's Care Plan opens (Figure 5).
- The completed **M47-THEO – MIECHV Program Exit – Index Parent & Index Child** survey displays in the Activity Timeline.
- Repeat steps to enter an M47 exit survey for any additional clients who are disenrolling.

THEO DEMO EHS PRACTICE AREA

VISITOR2, HOME

CARE PLAN 0000966: WILLIAMS, TRINA - 10/20/2019

Williams, Trina

0000966 Born 1/1/1990 30 year old Female

CARE PLAN

CLIENT

CONTACT

CASE

MIECHV Early Head Start - 10/20/2019

Williams, Trina

971-222-1111 - Mobile

Care Plan OVERVIEW ACTION PLAN

CASES

4106866

ALERTS

No alerts.

CLIENT ISSUES

No client issues.

CLIENT STRENGTHS

No client strengths.

CLIENT RISKS

No client risks.

Activity Timeline

FEB 01 ✓ Client Survey M47-THEO - MIECHV Program Exit - Index Parent & Index Child SURVEY DATE 02/01/2020 Complete

FEB 01 ✓ Case Visit Visit DATE 02/01/2020 Visit Compl...

JAN 05 ✓ Case Visit Visit DATE 01/05/2020 Visit Compl...

DEC 01 ✓ Case Visit Visit DATE 12/01/2019 Visit Compl...

NOV 12 ✓ Client Survey M47-THEO 3 Months Post Enrollment - Index Parent for Mother Enrolled with Child SURVEY DATE 11/12/2019 Complete

NOV 12 ✓ Client Survey M47-THEO Child's Enrollment Tool - Index Parent SURVEY DATE 11/12/2019 Complete

Figure 5: Completed Exit Survey in the Activity Timeline

4.2 Final Case Visit (if one occurred)

Enter a Case Visit for each client who is disenrolling whenever a final disenrollment visit occurs. Follow the instructions for adding a [Case Visit](#), which start on page [36](#). Repeat the steps for each client disenrolling.

4.3 Enrollment End Date

- From the Care Plan of each client who is leaving the program, click on the Update Enrollment icon under the heading “Enrollment” (Figure 1).

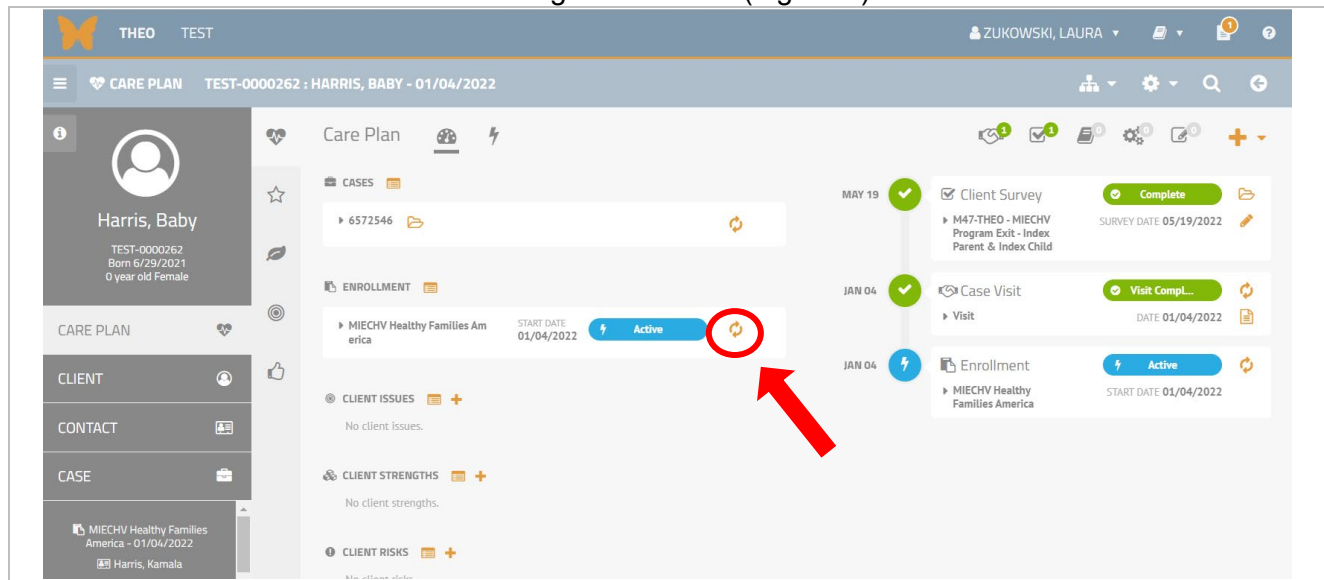


Figure 1: Update Enrollment

The client's Enrollment record opens (Figure 2).

- Enter the Enrollment End Date.
- Click on the orange Update & Close button.

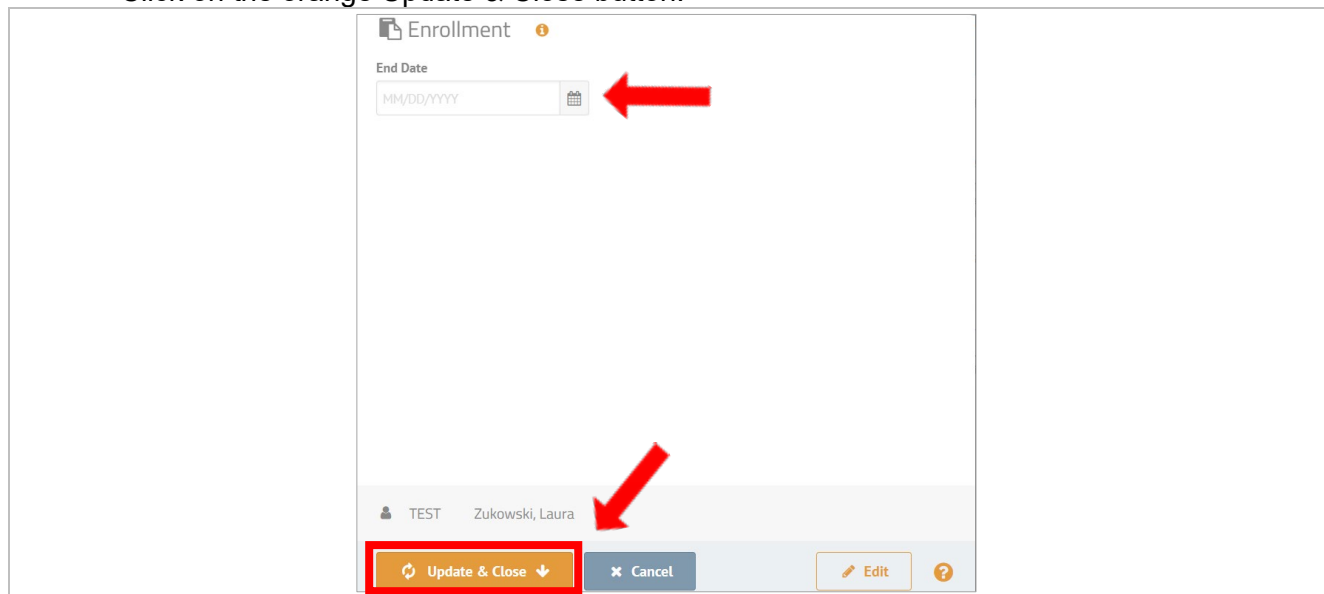


Figure 2: Enter Enrollment End Date

Enrollment record closes (Figure 3).

- Enrollment End Date and “Complete” status display on the records in the Enrollment section and the Activity Timeline.
- Repeat steps for entering an Enrollment End Date for any additional clients who are disenrolling.

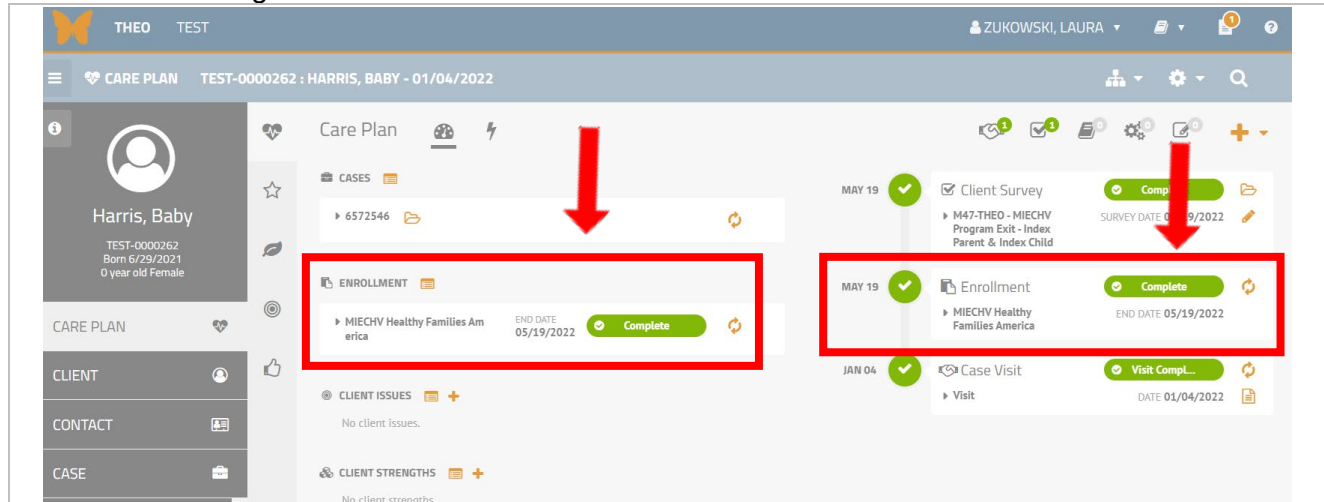


Figure 3: Enrollment record displays an Enrollment End Date and a “Complete” status

5.0 Error Messages and Fixing Data Entry

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

- 5.1 Recognize simple error messages and resolve them: See page [51](#)
- 5.2 Edit a survey to finish entering data or to correct data on the survey: See page [55](#)
- 5.3 Delete a survey: See page [59](#)

5.1 Error messages

5.1.1 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.

The screenshot shows the 'New Client' form in the THEO system. The form has a header bar with 'THEO TEST' and a user profile 'VISITOR, HOME'. Below the header is a 'CLIENTS' section with a search icon. The main form area is titled 'New Client' and contains a section for 'REQUIRED FIELDS'. The fields are: Last Name (Client), First Name (New), Middle Name, Prefix, Suffix, Also Known As, Birth Date (MM/DD/YYYY), Gender (dropdown), and Primary Spoken Language. The Birth Date and Gender fields have orange borders on their left sides, indicating they are required. A red arrow points to the Birth Date field, and a red box highlights the Birth Date, Gender, and Primary Spoken Language fields. At the bottom of the form are two buttons: 'Save & Open' (orange) and 'Cancel' (blue).

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).

THEO EHS TEST AREA

CLIENTS

New Client

REQUIRED FIELDS

Birth Date
MM/DD/YYYY
(mm/dd/yyyy)
The Birth Date field is required.

Gender
The Gender field is required.

Primary Spoken Language

Secondary Spoken Language

Preferred Written Language

Requires Interpretive Services

Alternate Written Materials Format

Save & Open Cancel Unable to submit. Please check form for errors.

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).

THEO EHS TEST AREA

CLIENTS

New Client

REQUIRED FIELDS

Birth Date
5/5/2000
(mm/dd/yyyy)
The Birth Date field is required.

Gender
Female
The Gender field is required.

Primary Spoken Language

Secondary Spoken Language

Preferred Written Language

Requires Interpretive Services

Alternate Written Materials Format

Site Client ID

Save & Open Cancel

Figure 3: Required fields with data entered in them

THEO saves your data entry and closes the window (Figure 4).

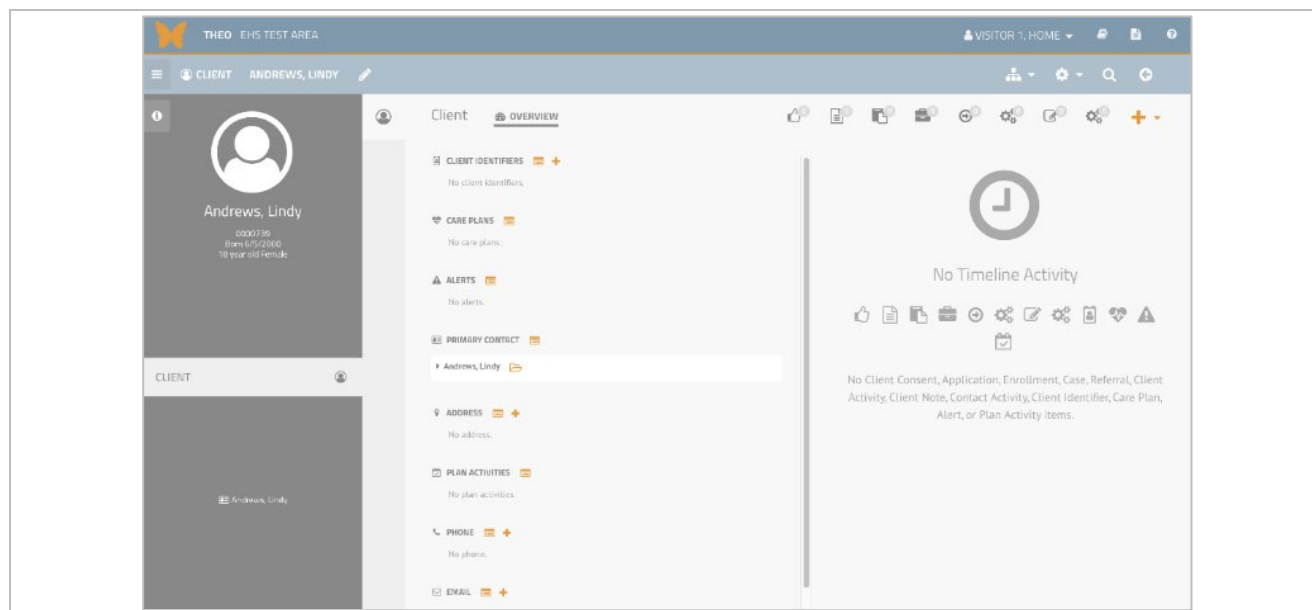


Figure 4: Record saved

5.1.2 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.

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

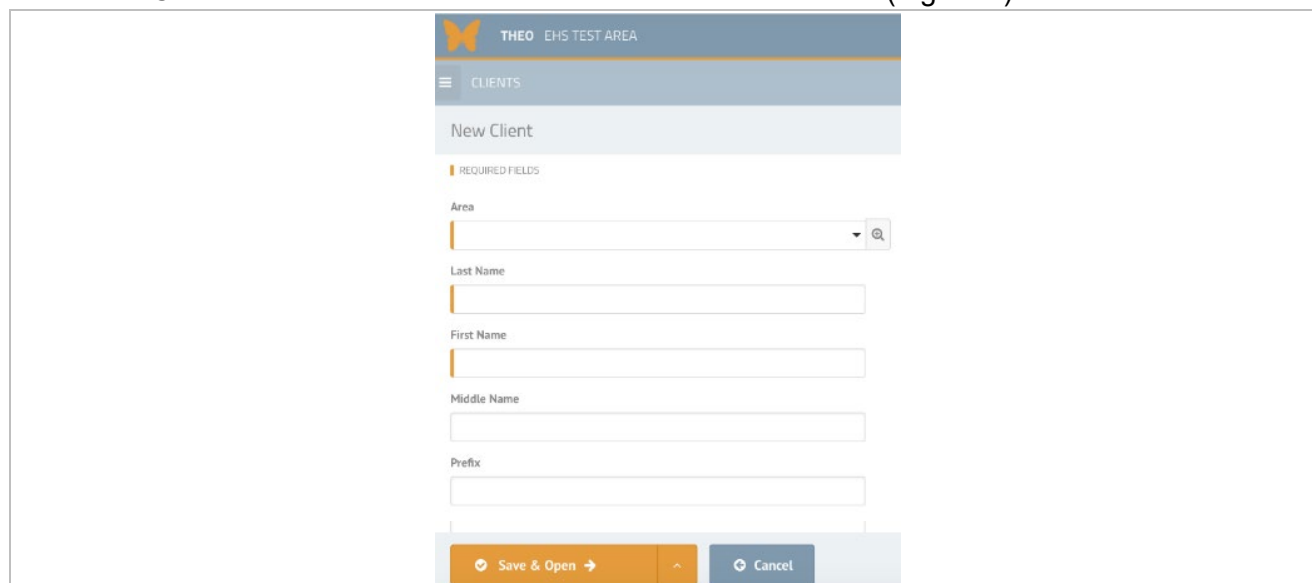


Figure 1: New Client screen

- 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.

Birth Date

6/7/2030

(mm/dd/yyyy)

❗ Date must be on or before today's date. 6/7/2030 is in the future.

Figure 3: Birth Date field – Error message about future dates

5.1.3 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.

☒ Phone

☐ Enter second phone number

PRIMARY PHONE

Phone Number

1234567890

❗ Invalid Format

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.

☒ Phone

☐ Enter second phone number

PRIMARY PHONE

Phone Number

123-456-7890

Phone Type

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 any of the fields or delete the entire survey.

Follow the steps below to edit a survey.

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

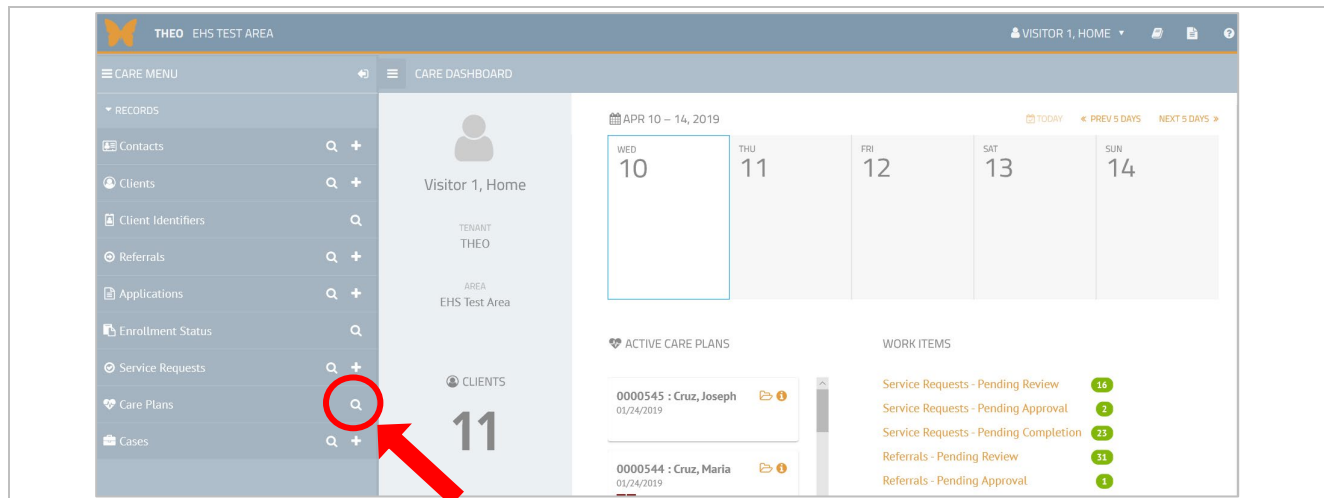


Figure 1: Care Menu – Find Care Plans icon

The Search Care Plans screen opens (Figure 2).

- Enter the name of the client or Client ID in the Client search field. Click on the orange Search button at the bottom of the screen.

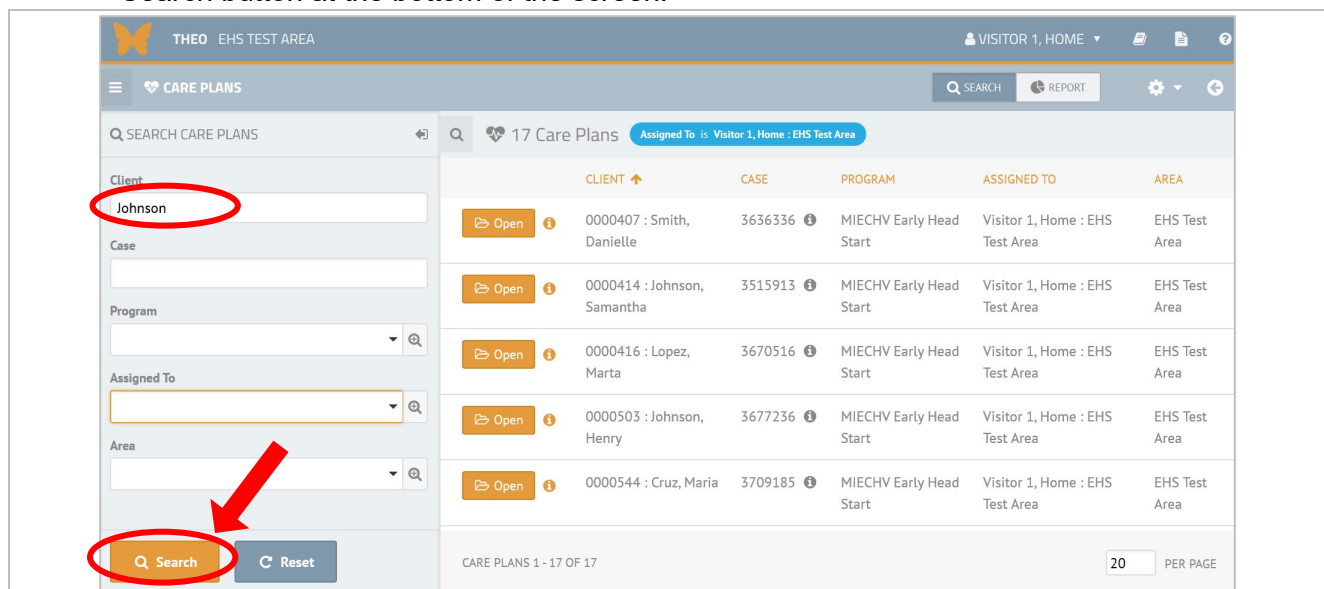


Figure 2: Search Care Plans – Clients search field

Care Plans for clients with the name you searched for appear in the search results, on the right side of your screen (Figure 3).

- Click on the orange Open button to the left of the client's name to open the client's Care Plan.

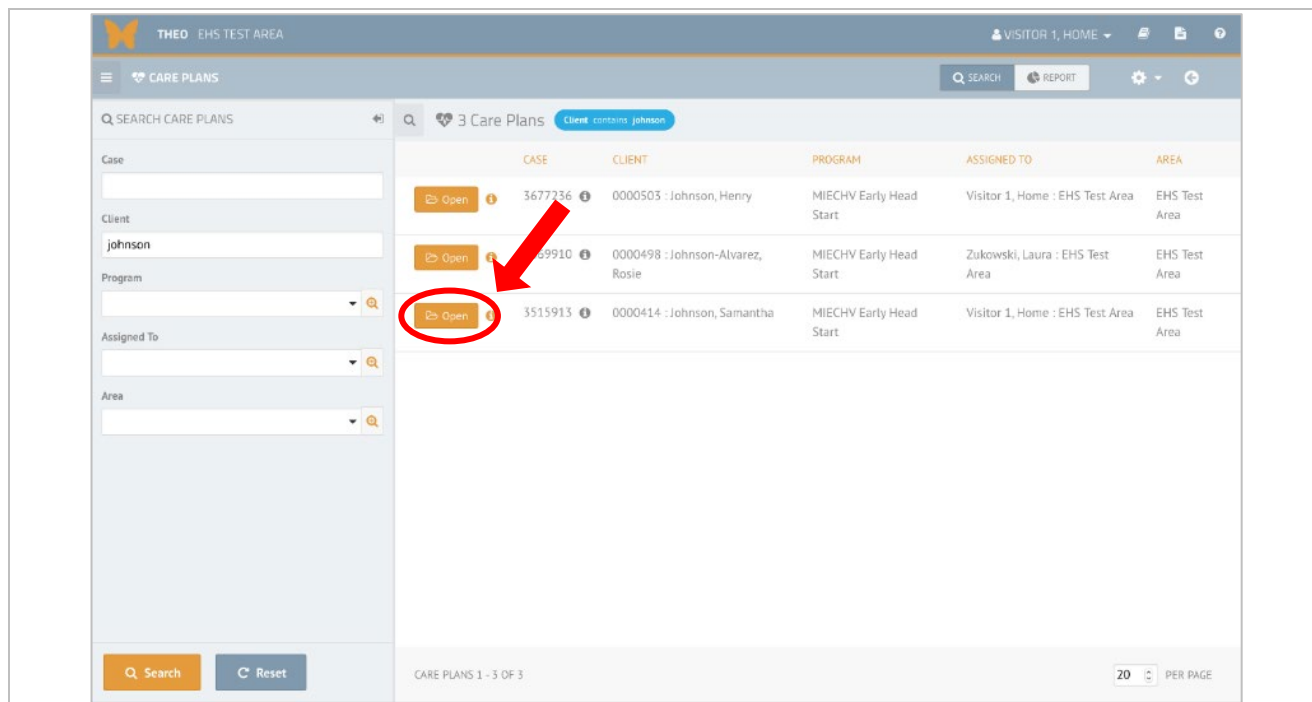


Figure 3: Search Care Plans screen – Open Care Plan button

The Care Plan opens (Figure 4).

- Find the Client Survey you need to edit in the Activity Timeline. Click on the Edit Client Survey icon.

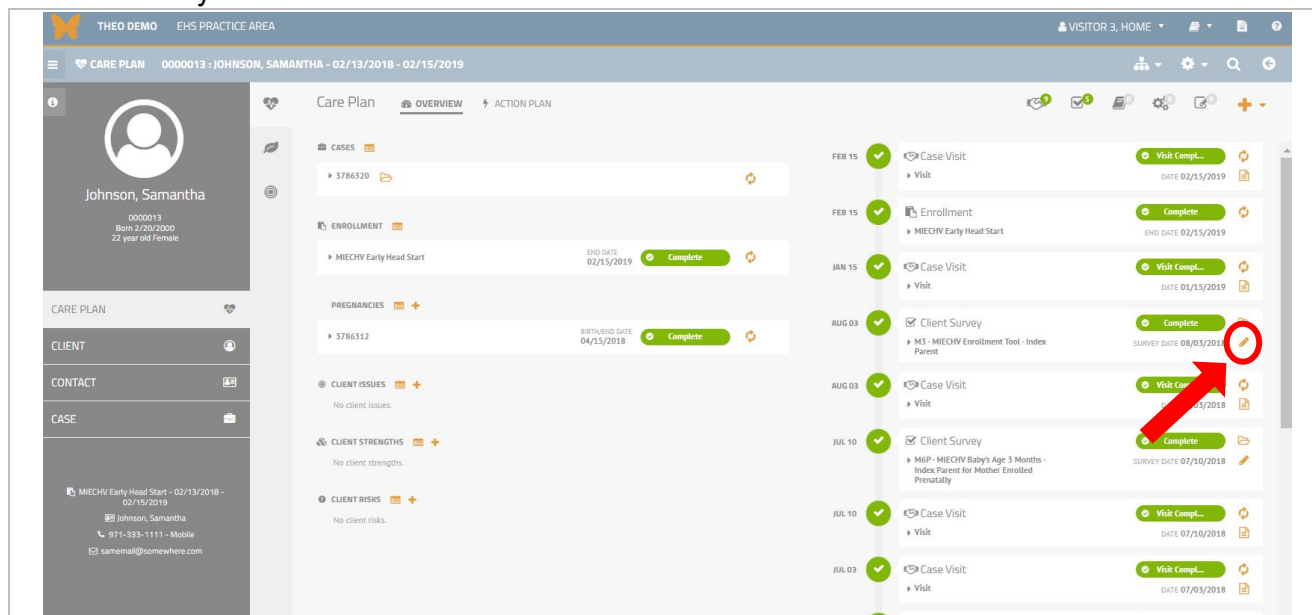


Figure 4: Edit Client Survey icon

The survey window opens (Figure 5).

- Edit the responses and click on the orange Save & Continue button.

CLIENT SURVEY

Johnson, Samantha

Female | DOB: 08/25/1996 | 0000414

Enrollment 1 of 2

Questions about Family

1. Which members of your (index parent's) family are currently serving or formerly served in the military - active or reserve?
Please check all that apply:

☐ Index parent
☐ Index parent's spouse
☐ Index parent's parent(s)
☐ Father of child
☐ Mother of child
☒ None

2. Additional Children in Home?
If yes, enter Date of Birth of child other than Index Child living in the home (Birth - 18 yrs old).

☐ Yes
☒ No

Date of Birth:

Save & Continue Cancel

Figure 5: Edit responses and then save the data entry

The Client Survey closes and displays in the Activity Timeline (Figure 6).

- The survey includes the changes you saved.

THEO DEMO EHS PRACTICE AREA

VISITOR 3, HOME

CARE PLAN 0000013 : JOHNSON, SAMANTHA - 02/13/2018 - 02/15/2019

Johnson, Samantha

0000013
Born 8/25/1996
22 year old Female

CARE PLAN

CLIENT

CONTACT

CASE

MIECHV Early Head Start - 02/13/2018 - 02/15/2019
Johnson, Samantha
971-333-1111 - Mobile
samantha@somewhere.com

Care Plan OVERVIEW ACTION PLAN

CASES

3786320

ENROLLMENT

MIECHV Early Head Start

END DATE 02/15/2019 Complete

PREGNANCIES

3786312

BIRTH/END DATE 04/15/2018 Complete

CLIENT ISSUES

No client issues.

CLIENT STRENGTHS

No client strengths.

CLIENT RISKS

No client risks.

FEB 15 Case Visit Visit Complete DATE 02/15/2019

FEB 15 Enrollment Complete END DATE 02/15/2019

FEB 15 Case Visit Visit Complete DATE 02/15/2019

AUG 03 Client Survey Complete SURVEY DATE 08/03/2018

AUG 03 Case Visit Visit Complete DATE 08/03/2018

JUL 10 Client Survey Complete SURVEY DATE 07/10/2018

JUL 10 Case Visit Visit Complete DATE 07/10/2018

JUL 03 Case Visit Visit Complete DATE 07/03/2018

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” tab in the workflow at the top of the window (Figure 7).

- This will open the earlier step and allow you to edit the data you entered on that step.
- Click on orange Save & Continue button and continue to save each window that opens until you have reached the end of the survey when the survey window closes.

The screenshot displays the 'CLIENT SURVEY' summary screen. At the top, a navigation bar includes tabs for 'CLIENT', 'SELECT SURVEY', 'CLIENT SURVEY' (which is highlighted and pointed to by a red arrow), and 'INFORMATION'. Below the navigation bar, the client's name 'Johnson, Samantha' is shown, along with her gender 'Female', date of birth '02/20/2000', and ID '0000013'. The main section is titled 'Edit Existing Client Survey Information' and contains the following details:

- Survey Number:** 3787762
- Client:** 0000013 : Johnson, Samantha
- Survey Type:** M3 - MIECHV Enrollment Tool - Index Parent
- Survey Date:** 8/3/2018 (with a calendar icon)
- Status:** Complete
- Status Date:** 4/8/2019
- Completed By:** Visitor 2, Home : EHS Practice Area (with a dropdown arrow and search icon)
- Area:** EHS Practice Area

At the bottom of the screen, an orange button labeled 'Save & Continue' with a right-pointing arrow is circled in red and pointed to by another red arrow.

Figure 7: Client Survey summary screen

5.3 Delete a survey

THEO allows you to delete a survey from a client's Care Plan. Follow the steps below to delete a survey.

From a Home Visitor's Home Page, click on the Open Care Plan icon to the right of the client's name under "Active Care Plans" (Figure 1).

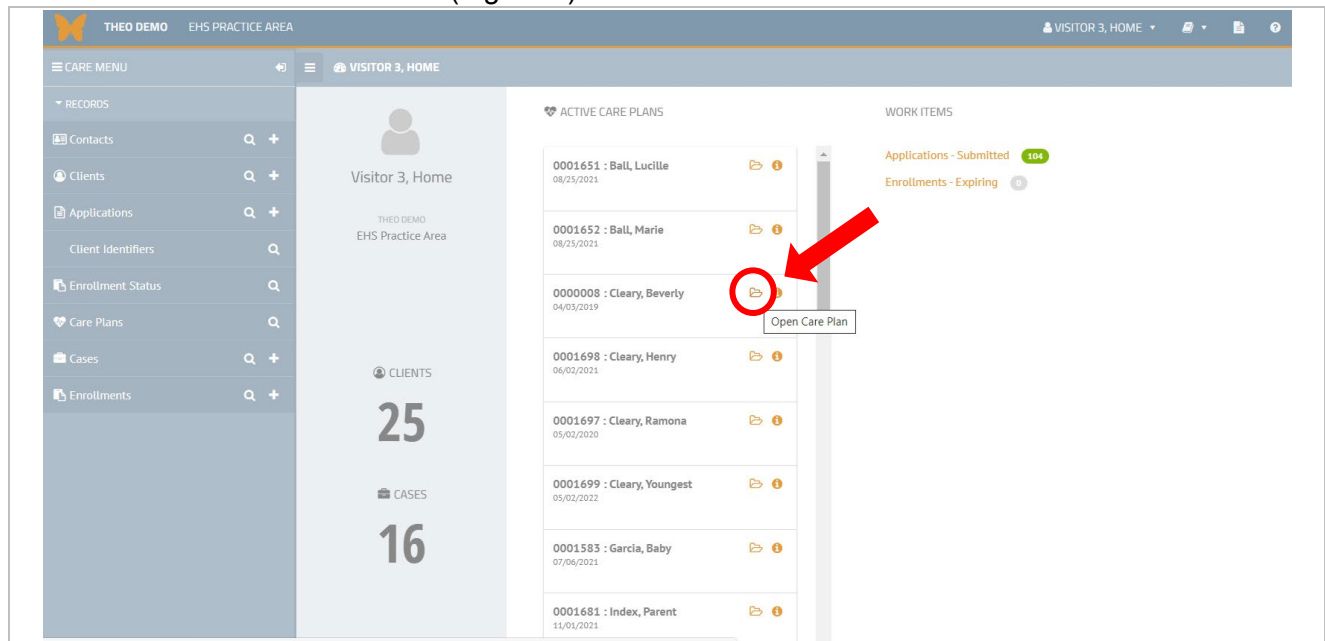


Figure 1: Home Visitor's Home Page – Open Care Plan

Client's Care Plan opens (Figure 2).

- Find the survey you need to delete and click on the Open Client Survey icon.

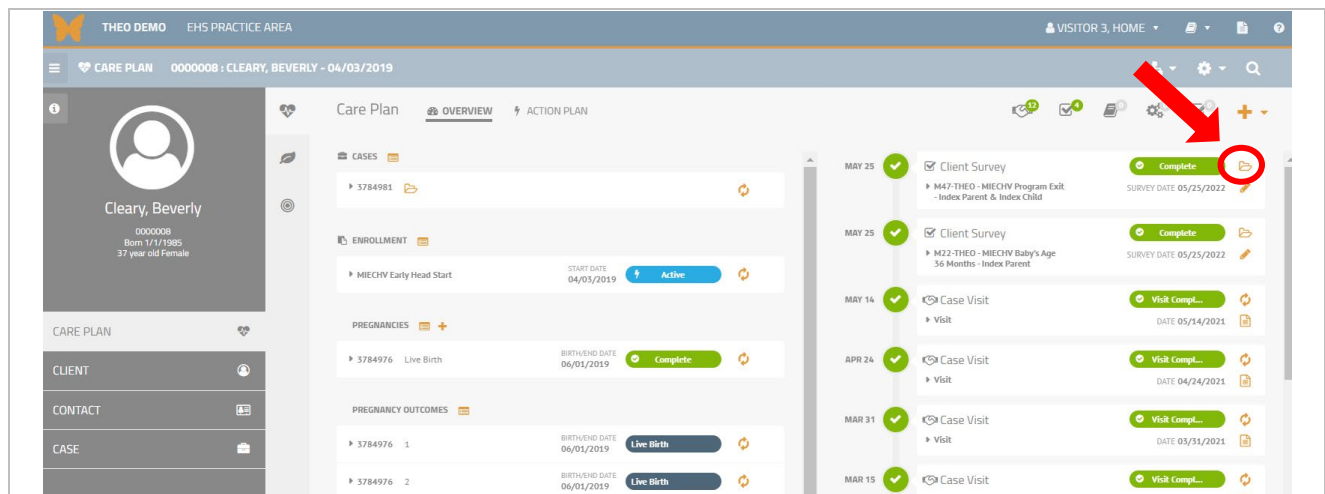


Figure 2: Open Client Survey icon

The Client Survey screen opens (Figure 3).

- Mouse over the Gear/Daisy icon, and the Actions menu opens.
- Click on “Delete Client Survey”.

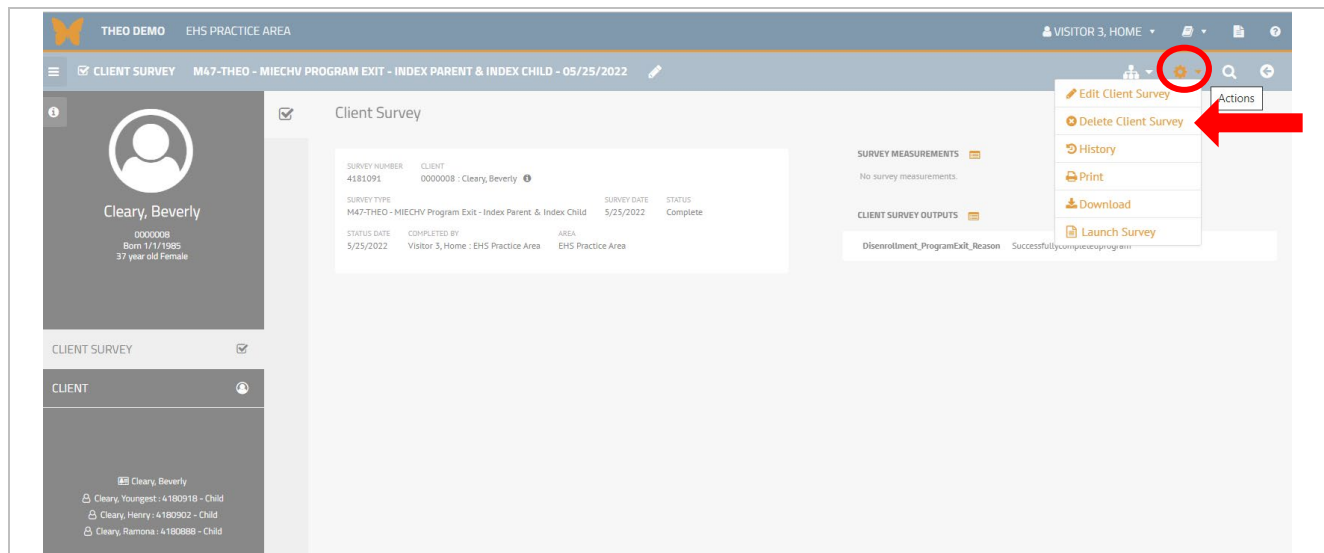


Figure 3: Delete Client Survey on the Actions menu

THEO asks you to confirm that you wish to delete the survey (Figure 4).

- Click on the red Delete button if you wish to delete the survey. Click the grey Cancel button if you don't wish to delete the survey.

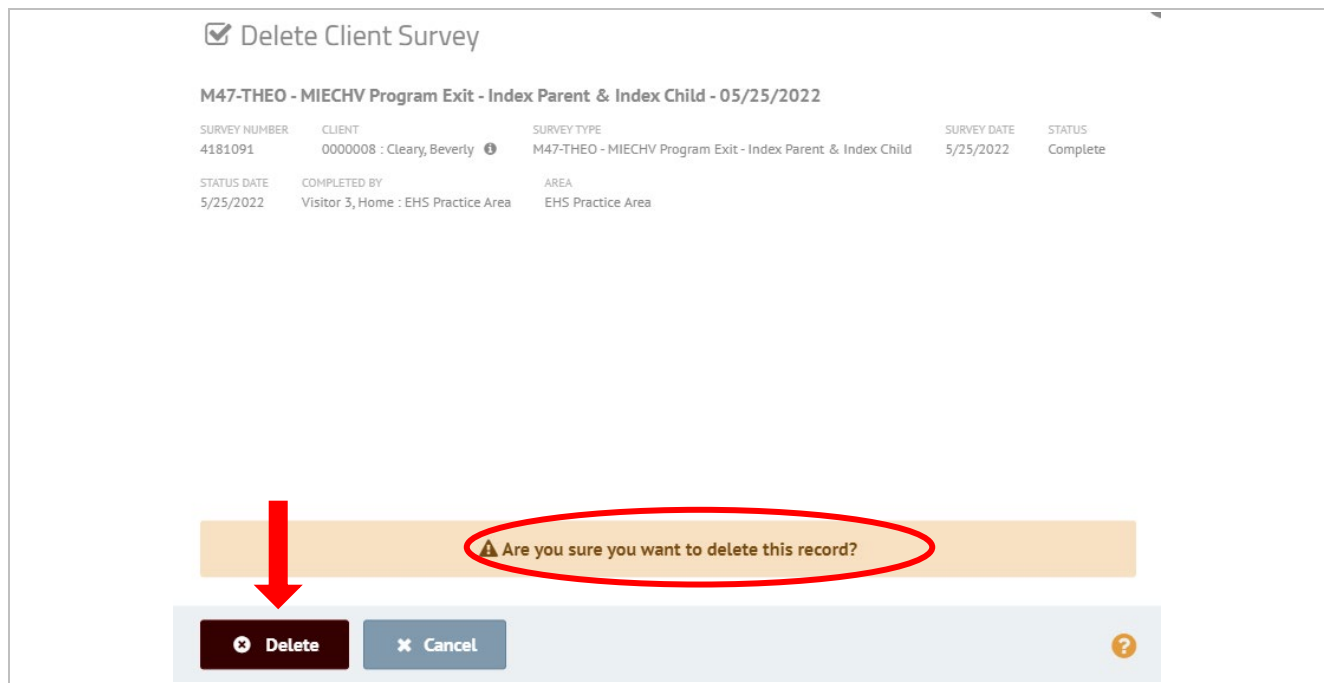


Figure 4: Confirm you wish to delete the survey

Care Plan opens (Figure 5).

- Deleted survey (M47 Exit Survey on 5/25/2022) no longer appears in the Activity Timeline.

The screenshot displays the 'Client Survey Summary' screen for a client named Beverly Cleary. The interface is divided into several sections:

- Header:** Shows 'THEO DEMO' and 'EHS PRACTICE AREA'. The client's name 'CLEARY, BEVERLY' and date '04/03/2019' are visible.
- Client Profile:** On the left, a card shows the client's name, ID '0000008', birth date 'Born 1/1/1985', and age '37 year old Female'.
- Care Plan Overview:** The main section shows 'Care Plan' with tabs for 'OVERVIEW' and 'ACTION PLAN'. It lists various categories:
 - CASES:** Includes '3784981'.
 - ENROLLMENT:** Shows 'MIECHV Early Head Start' with a 'START DATE' of '04/03/2019' and a status of 'Active'.
 - PREGNANCIES:** Lists '3784976' with a 'Live Birth' status and a 'BIRTH/END DATE' of '06/01/2019'.
 - PREGNANCY OUTCOMES:** Shows two outcomes for '3784976', both marked as 'Live Birth' with a 'BIRTH/END DATE' of '06/01/2019'.
 - CLIENT ISSUES:** Indicates 'No client issues'.
- Activity Timeline:** On the right, a vertical timeline shows a series of events:
 - MAY 25:** 'Client Survey' (M47 Exit Survey) with a 'SURVEY DATE' of '05/25/2022' and a 'Complete' status.
 - MAY 14:** 'Case Visit' with a 'Visit Complete' status and a 'DATE' of '05/14/2021'.
 - APR 24:** 'Case Visit' with a 'Visit Complete' status and a 'DATE' of '04/24/2021'.
 - MAR 31:** 'Case Visit' with a 'Visit Complete' status and a 'DATE' of '03/31/2021'.
 - MAR 15:** 'Case Visit' with a 'Visit Complete' status and a 'DATE' of '03/15/2021'.
 - FEB 17:** 'Case Visit' with a 'Visit Complete' status and a 'DATE' of '02/17/2021'.
 - JAN 31:** 'Case Visit' with a 'Visit Complete' status and a 'DATE' of '01/31/2021'.

Figure 5: Client Survey Summary screen

6.0 Data Reporting

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

6.1 List Views

The List View feature is a reporting tool that allows you to search, sort, and download records.

Tips for using the list views to work with data

- Every list view has a search panel on the right 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 a search to clear out the search fields.
- Some search fields for dates include two fields, so that you can search for records from a single date or records from a time period.
- Searchable list views in THEO (and Search Fields):
 - Contacts (Last Name, First Name, Also Known As, Birth Date, Gender, Primary Spoken Language, Site Client ID, Medicaid (OHP) Number, Person)
 - Clients (Client ID, Area, Last Name, First Name, Also Known As, Birth Date, Gender, Primary Spoken Language, Site Client ID, Medicaid (OHP) Number, Person)
 - Client Identifiers (Identifier, Type, Birth Date, Enrolled, Case, Assigned To, City, State, Zip Code)
 - Applications (Application Status, Applicant, Program, Created On (date range), Submitted On (date range), Application Priority (priority range), Assigned To, Created On (date range))
 - 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)
 - Care Plans (Client, Case, Program, Assigned To, Area)
 - Cases (Case, Primary Client, Client, Active Clients (number range), Visit Frequency (number range), Assigned to, Area)

From your THEO Home Page, click on the Find icon to the right of Clients (Figure 1).

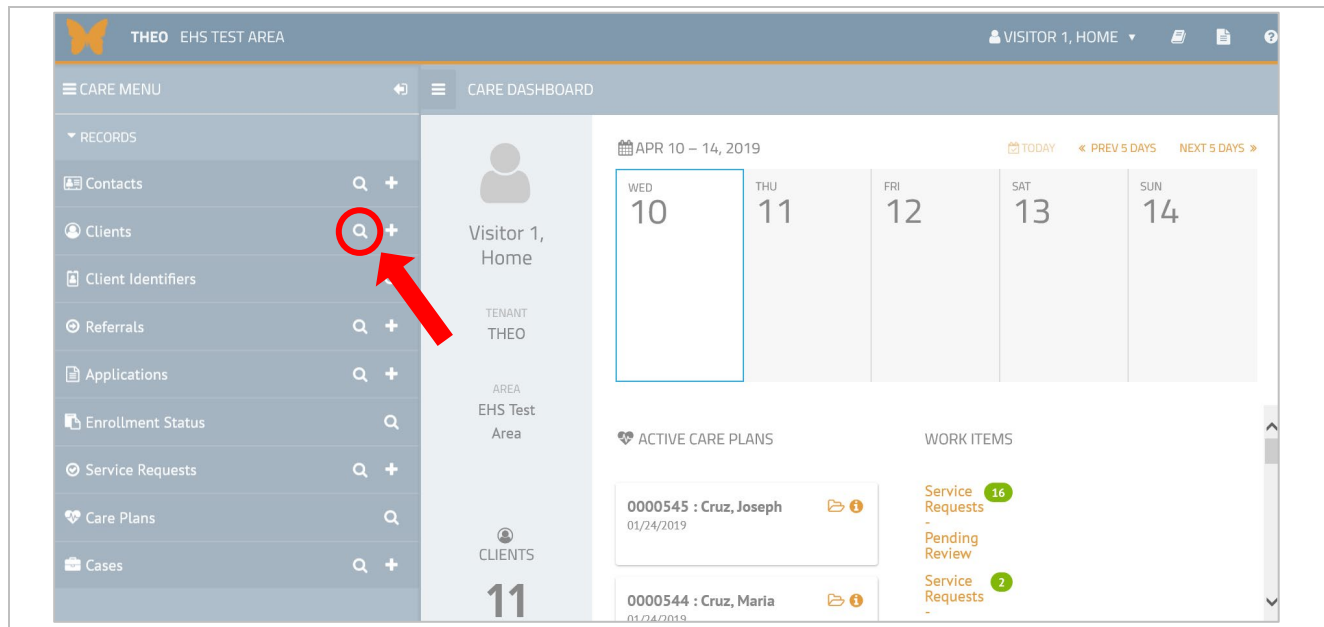


Figure 1: THEO Home Page – Care Menu

The Client Search screen opens (Figure 2).

- A panel with search fields appears on the left side of your screen.

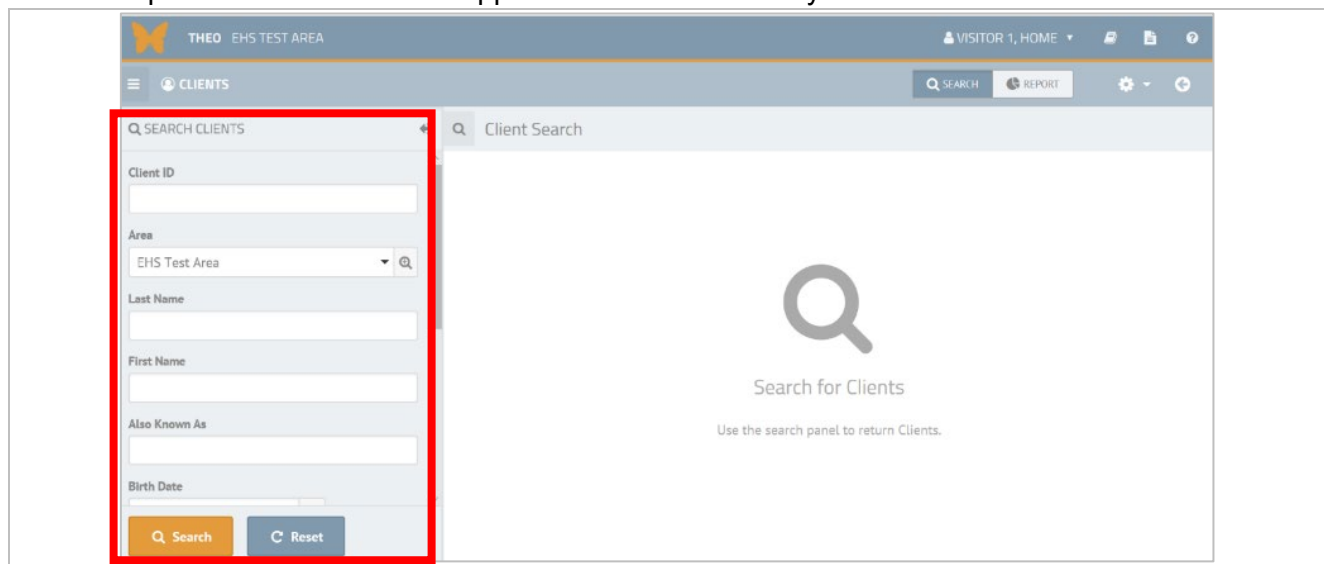


Figure 2: Client Search screen – Search panel on the left side of screen

6.2 Search for data using search filters

From the THEO Home Page, click on the Find icon (magnifying glass) to the right of Clients (Figure 1).

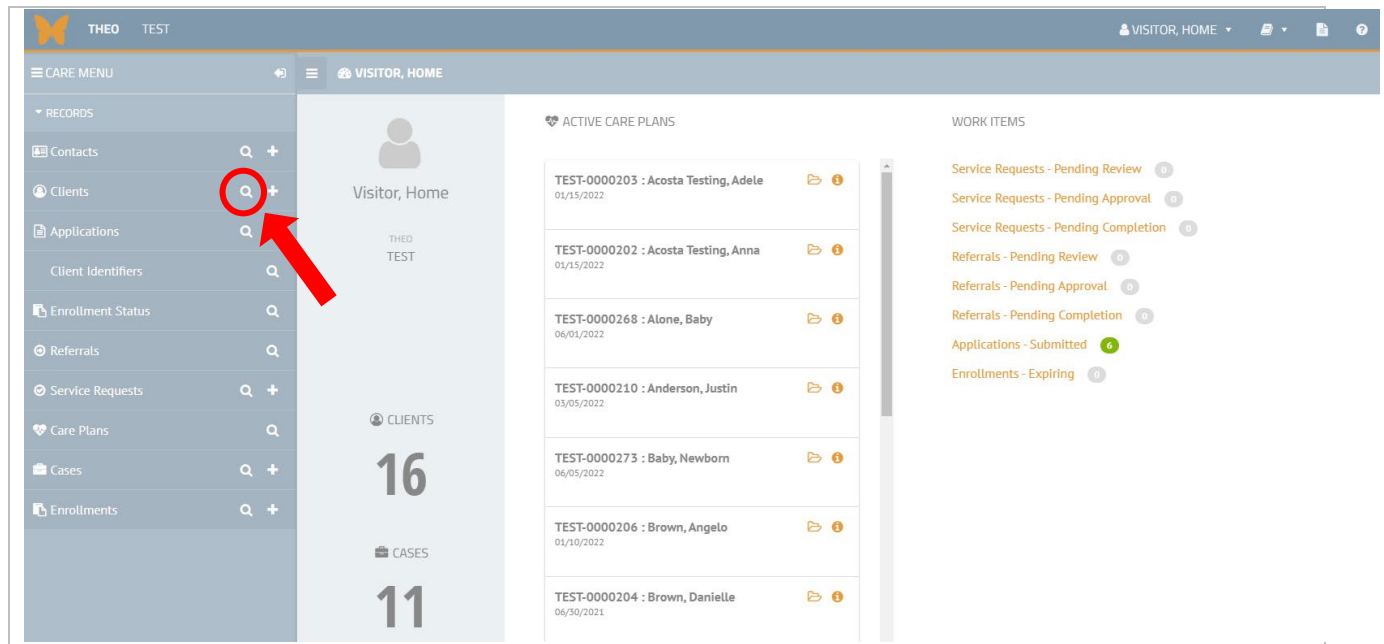


Figure 1: THEO Home Page – Search icon on the Care Menu

Client Search screen opens with a search panel on the left side of the screen (Figure 2).

- Search panel contains a group of fields (filters) you can use to search the records in THEO.
- Search fields include: Client ID, Area, Last Name, First Name, Also Known As, Birth Date, Gender, Primary Spoken Language, Local Client ID, Medicaid (OHP) Number, or Person ID or Name.

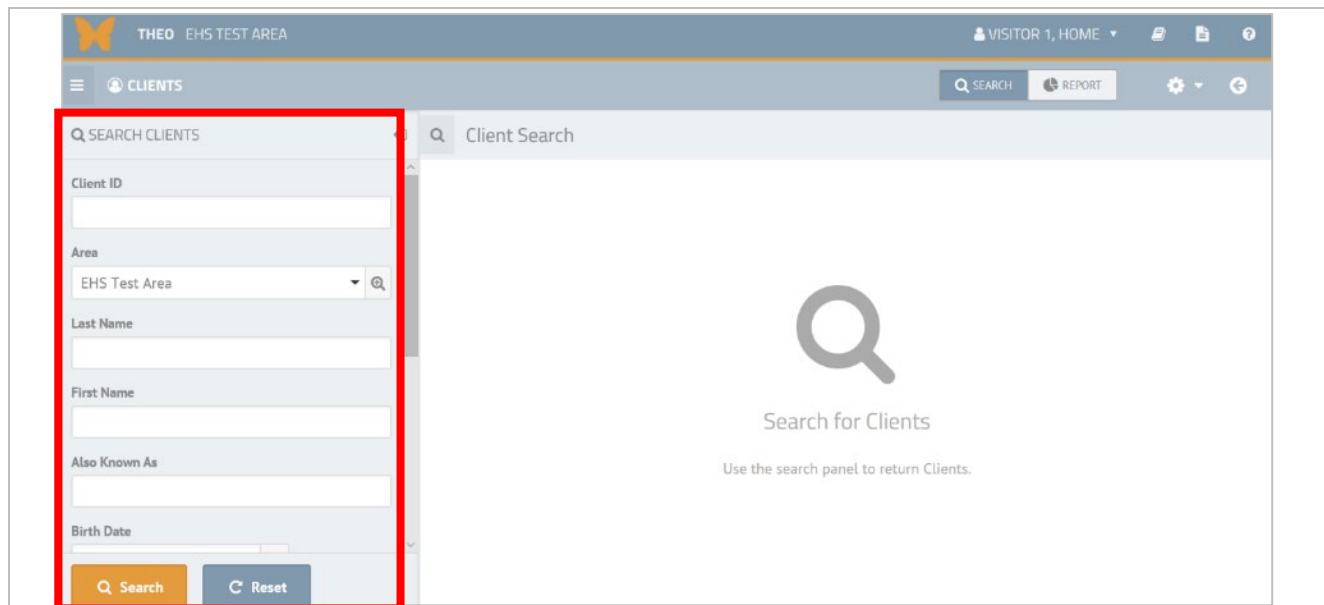


Figure 2: Search Clients screen – Panel with search fields

- Do not type anything in the search fields to search for all client records. Click on the orange Search button in the bottom left corner of the screen (Figure 3).

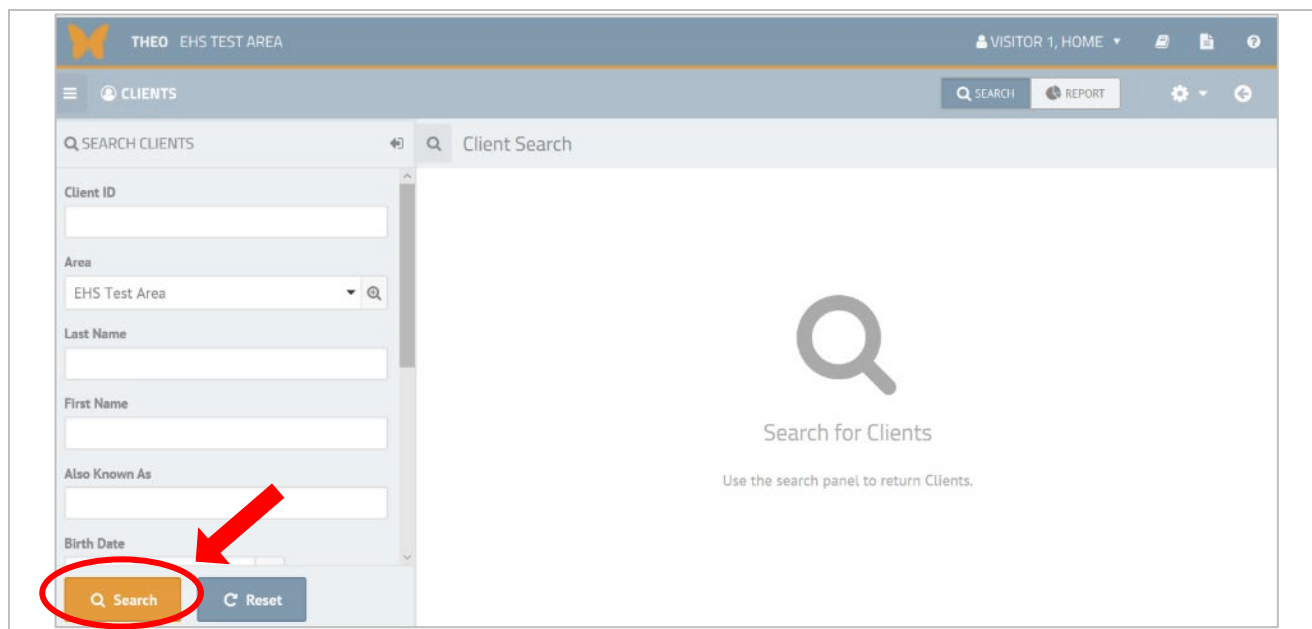


Figure 3: Search Clients – Search button

All client records appear in your search results, on the right side of your screen (Figure 4).

- Total number of client records in the search results appears at the top of your screen.
- Total number of pages in your results appears in the bottom right.

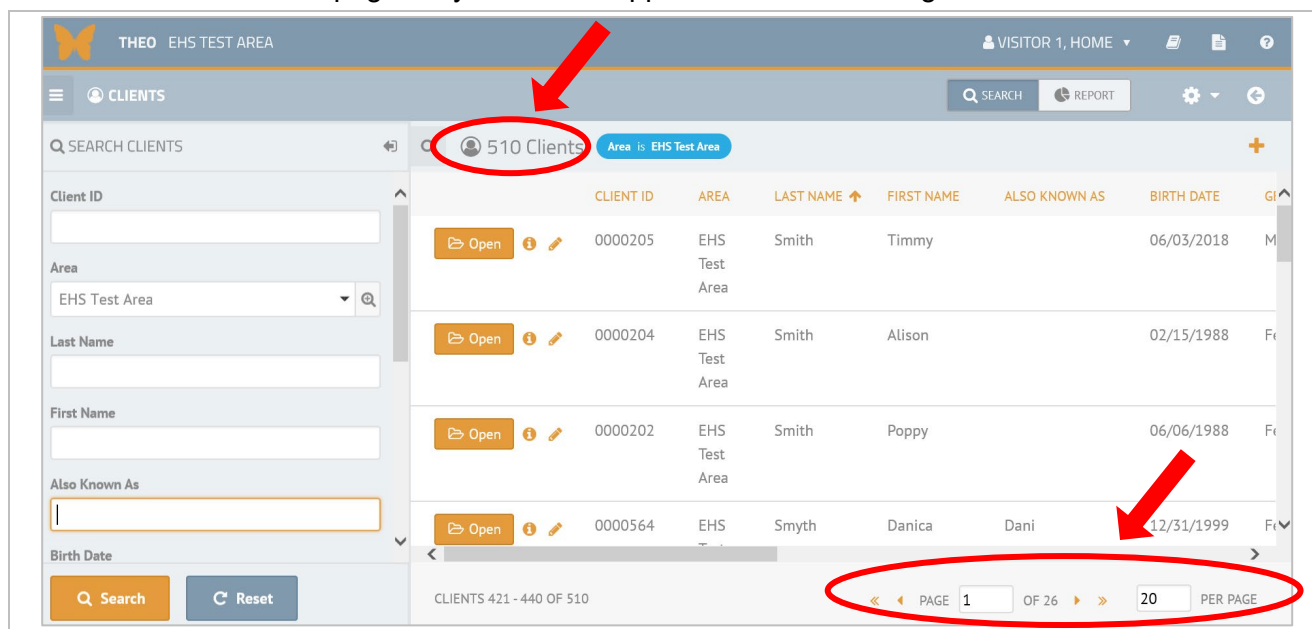


Figure 4: Search Clients screen – Total clients and pages in your search results

Change the number of records allowed on the screen by typing the total number of records in the Per Page field. This will make all records in the results display on one screen (Figure 5).

- Click the orange Search button in the bottom left corner of the screen.

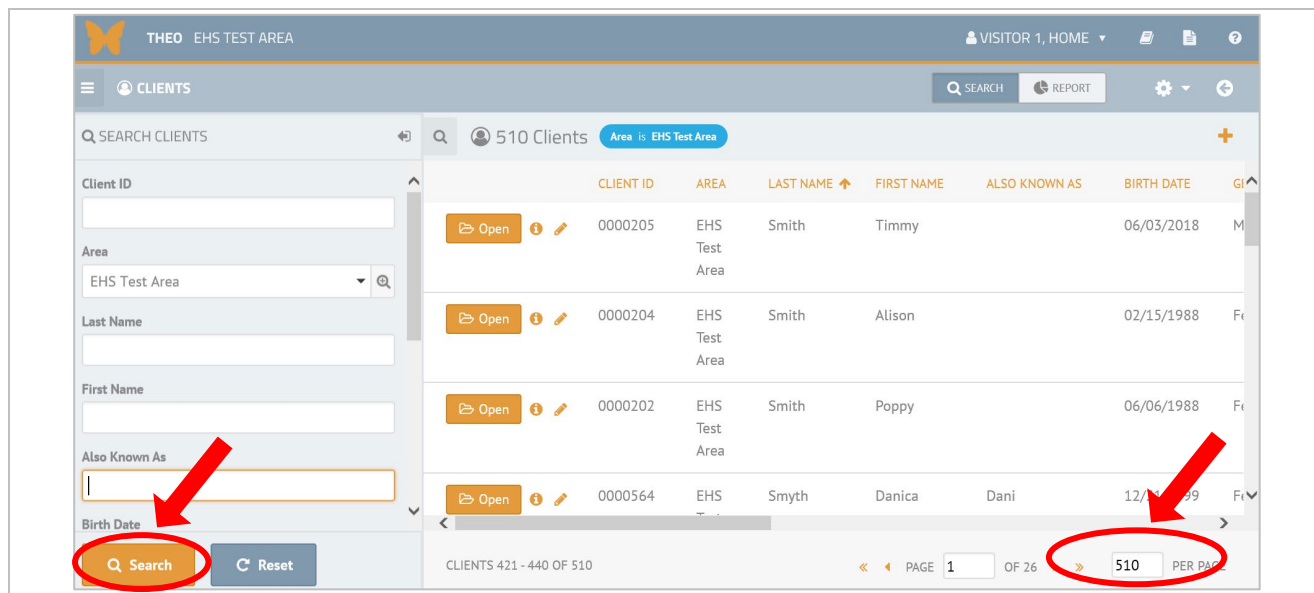


Figure 5: Search Clients - Change the number of records shown on each page

All clients display on your screen (Figure 6).

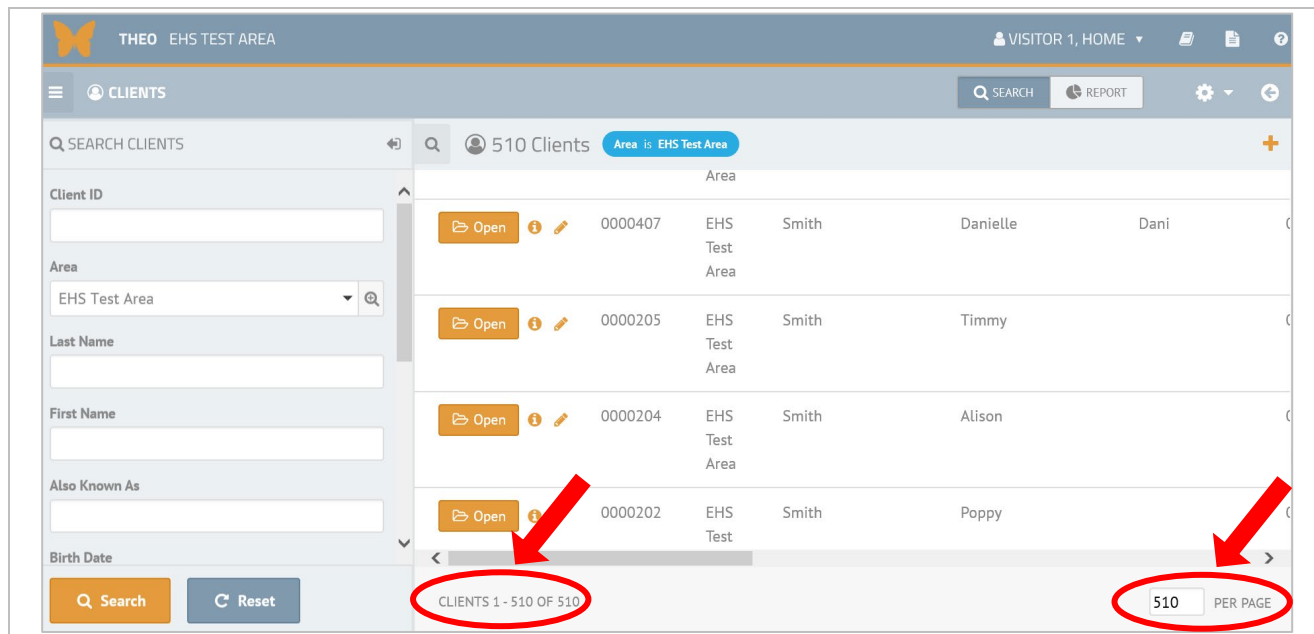
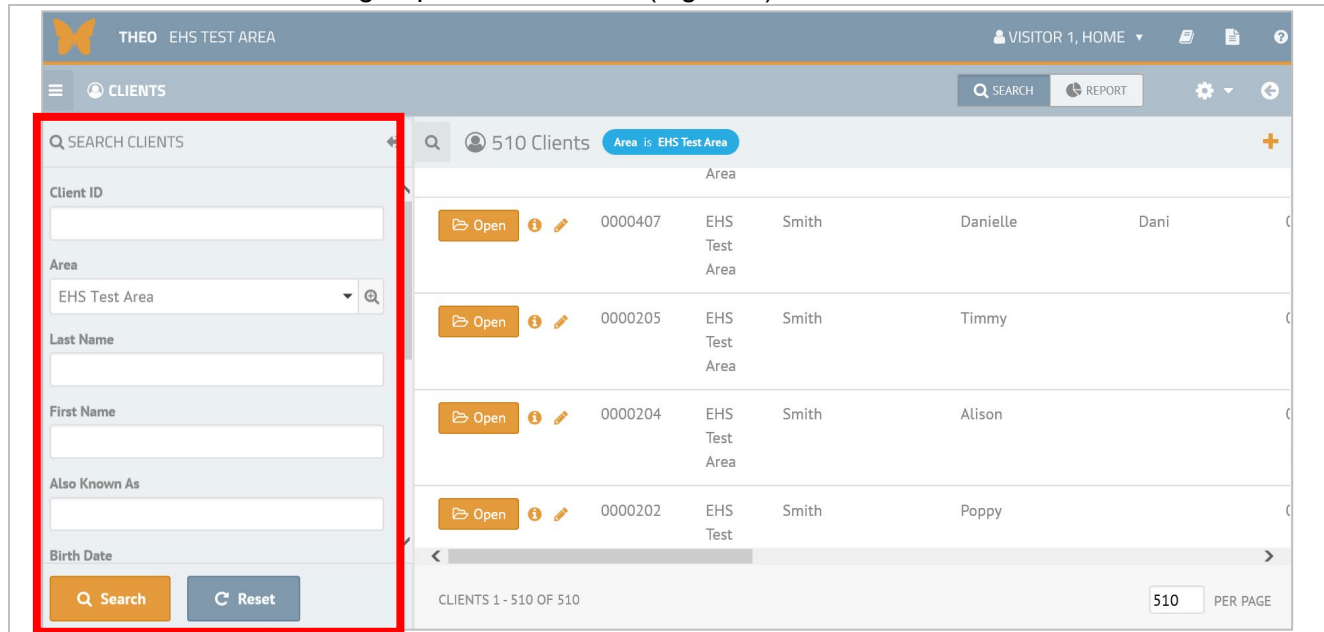


Figure 6: Search Clients - Total Clients per page of the search results

6.3 Filter for specific records

To search for specific records, use the search fields to define the search. For example, you could search for all clients who are female or were born during a certain year. You also could search for all clients who are female and were born during a certain year.

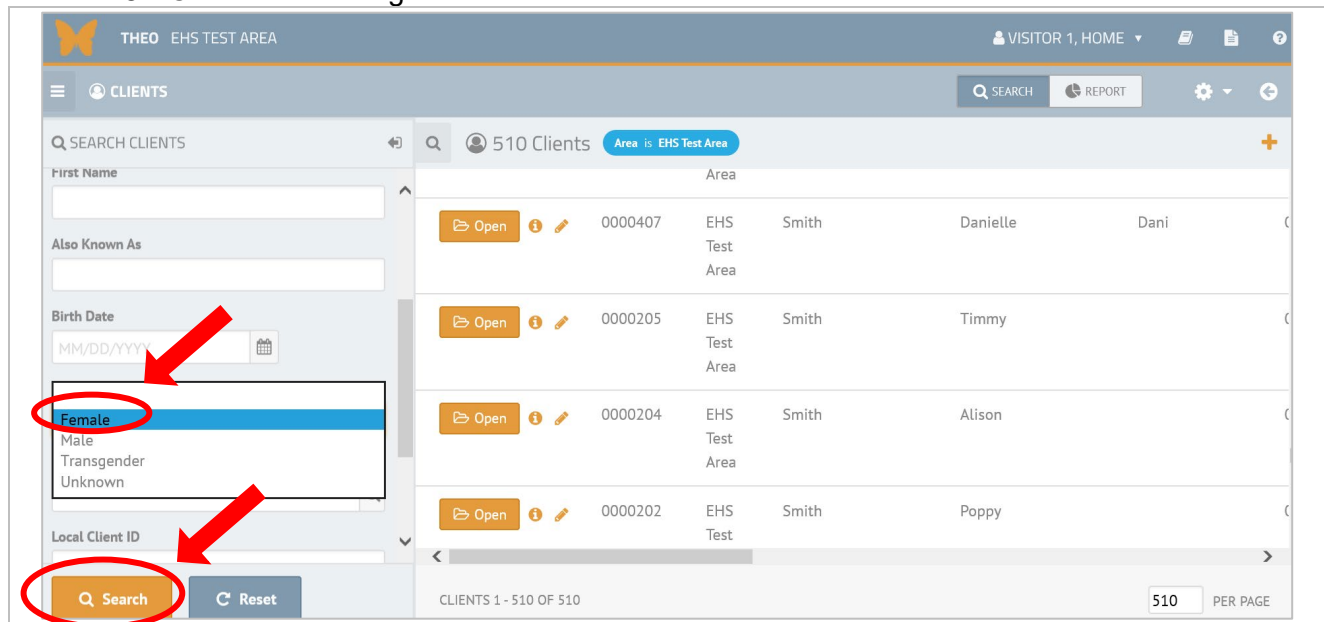
- This section continues from the previous section. The search panel on the left side of your screen contains a group of search fields (Figure 1).



The screenshot shows the 'THEO EHS TEST AREA' interface. On the left, a search panel titled 'SEARCH CLIENTS' is highlighted with a red box. It contains fields for Client ID, Area (set to 'EHS Test Area'), Last Name, First Name, Also Known As, and Birth Date. At the bottom of the panel are 'Search' and 'Reset' buttons. On the right, a table displays a list of 510 clients. The table has columns for Client ID, Area, and names. The first four rows are visible, showing clients with IDs 0000407, 0000205, 0000204, and 0000202, all in the 'EHS Test Area'. The bottom of the screen shows 'CLIENTS 1 - 510 OF 510' and a '510 PER PAGE' setting.

Figure 1: Search Clients screen – Search panel with search fields

- Search for only female clients (Figure 2).
 - Click on the Gender field and select “Female” in the drop-down list.
 - Click on the orange Search button.



This screenshot shows the same search panel as Figure 1, but with the 'Gender' field selected. A red arrow points to the 'Female' option in the drop-down menu. Another red arrow points to the 'Search' button at the bottom of the panel. The table on the right remains the same, showing the list of 510 clients.

Figure 2: Search Clients screen – Search for all female clients

Total of 347 female clients appear in your search results on the right side of your screen (Figure 3).

- Total number of client records found in the search appears at the top of your screen.
- Change the number of records per page in the lower right corner to match the total number of records in the search results. This will force all records in your search result to be available on one screen.

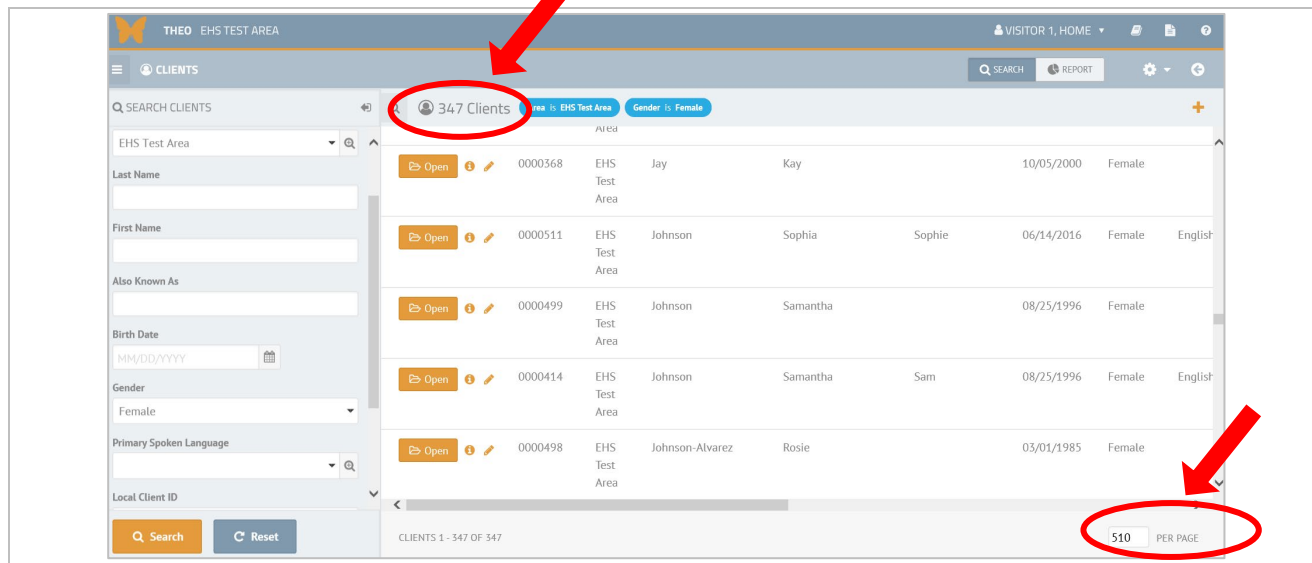


Figure 3: Search Clients – Search result with all female clients

You can make your search more specific by using more of the search fields (Figure 4).

- Click on the Primary Spoken Language search field on the left search panel. A drop-down menu opens. Click on “English” to select it from the drop-down menu.
- Click on the orange Search button on the bottom left of the screen.

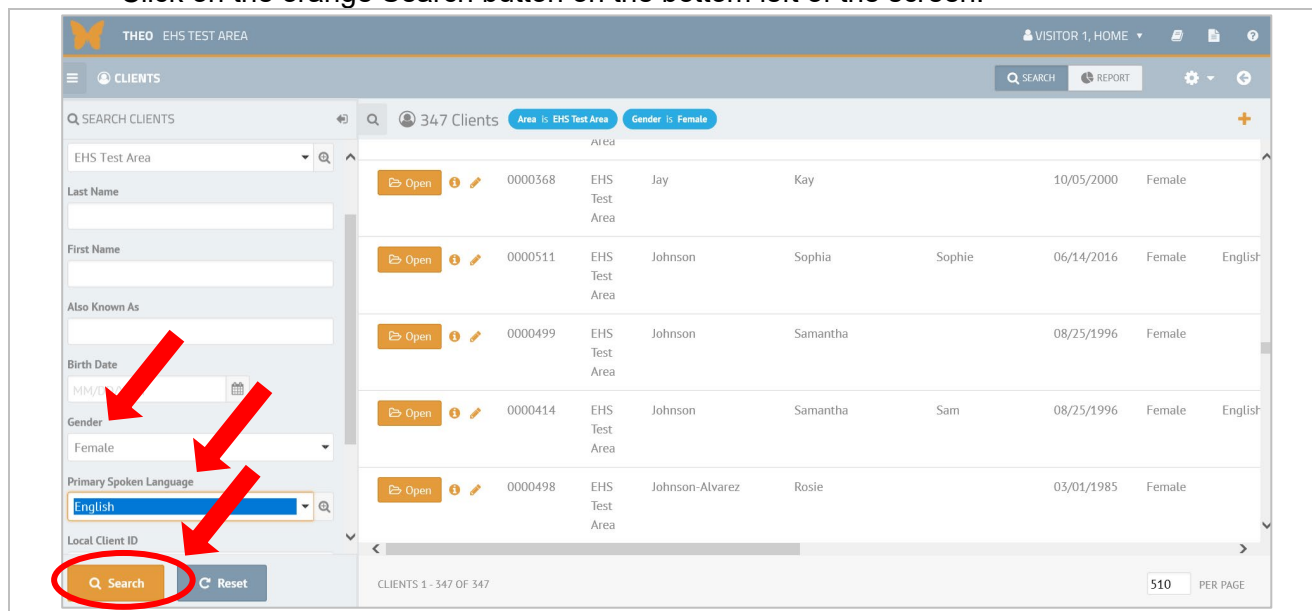


Figure 4: Filter selections for Gender (“Female”) and Primary Spoken Language (“English”)

Your search results display on the right side of your screen (Figure 5).

- All clients who are Female and whose primary language is English appear in the results.
- The total number of records in this result is only 34 clients.

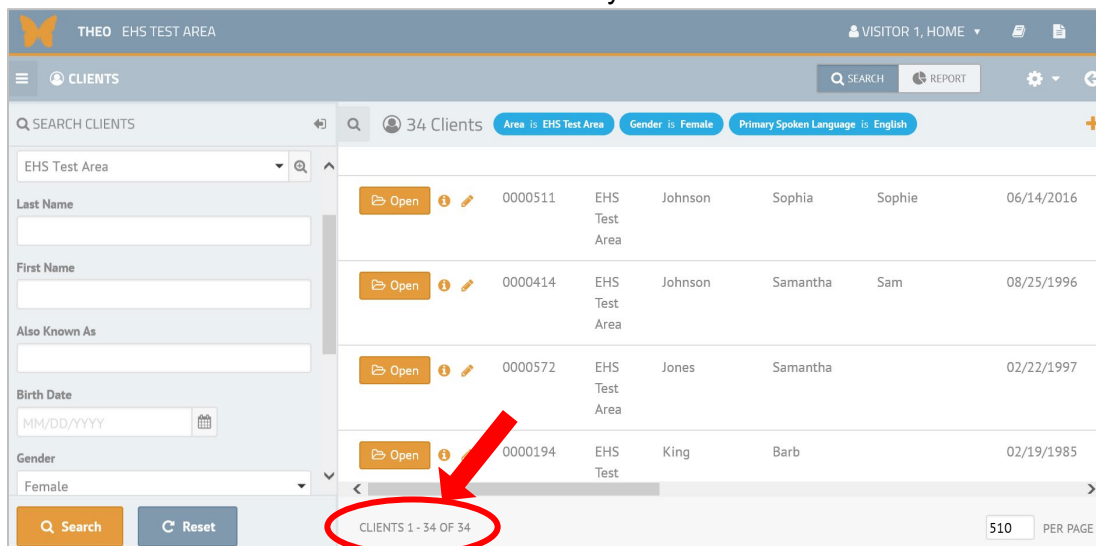


Figure 5: Search Clients – Search results using gender and language search fields

6.4 Sort records

THEO formats results into columns and rows, like a Microsoft Excel worksheet or a Microsoft Word table. 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.

Columns in the search results are sortable. Click on a column name to make the records sort in numerical or alphabetical order. Clicking once will sort the data in a column from the lowest to the highest number or from A to Z. Clicking again on the column name will sort the records in the column in reverse order, from highest to lowest number or from Z to A.

- Continuing from the screen in the previous section, click on the orange Client ID column name toward the top of your screen (Figure 1).

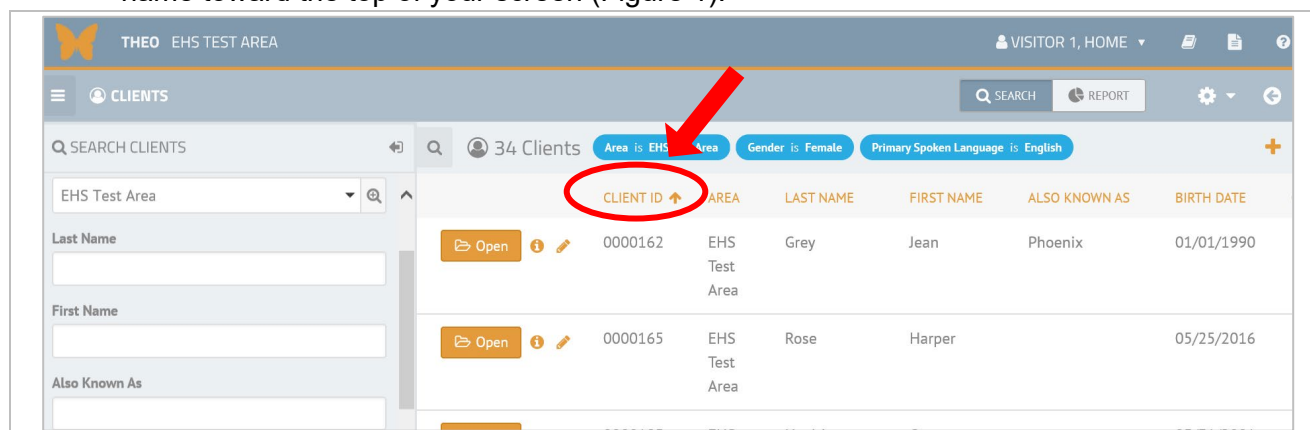
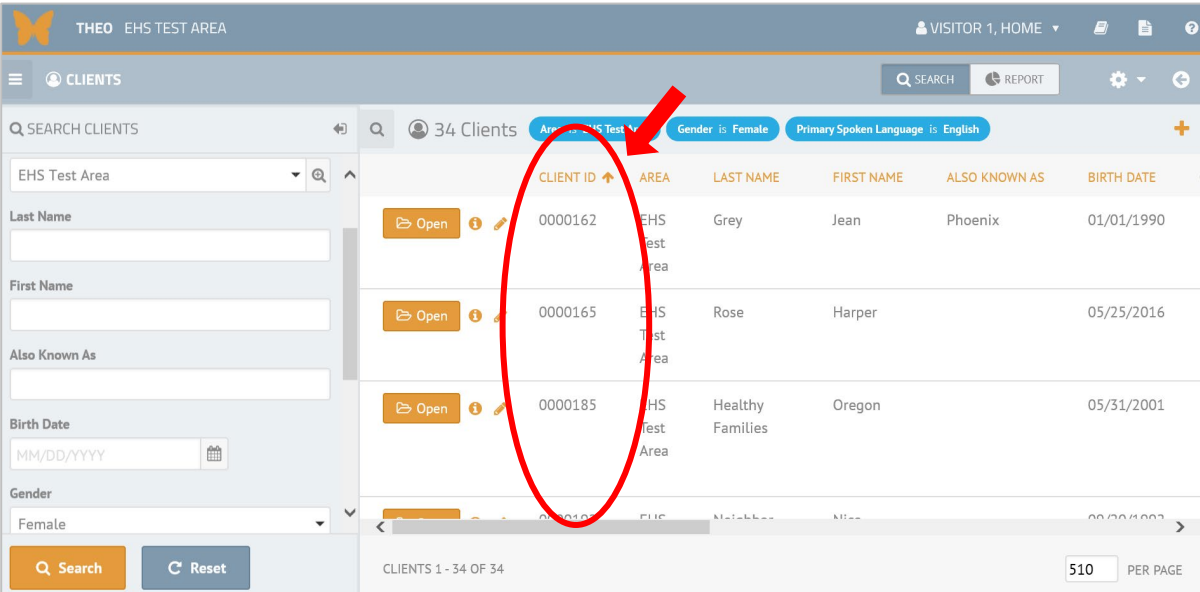


Figure 1: Search Clients screen – Column name for the Client ID field

Figure 2 shows the client records sorting, from the lowest to the highest Client ID in the search results.

- If you click on the Client ID column name again, THEO will show you the same records, sorted from the highest to the lowest Client ID in the search results.



THEO EHS TEST AREA

CLIENTS

SEARCH CLIENTS

EHS Test Area

34 Clients

Area is EHS Test Area Gender is Female Primary Spoken Language is English

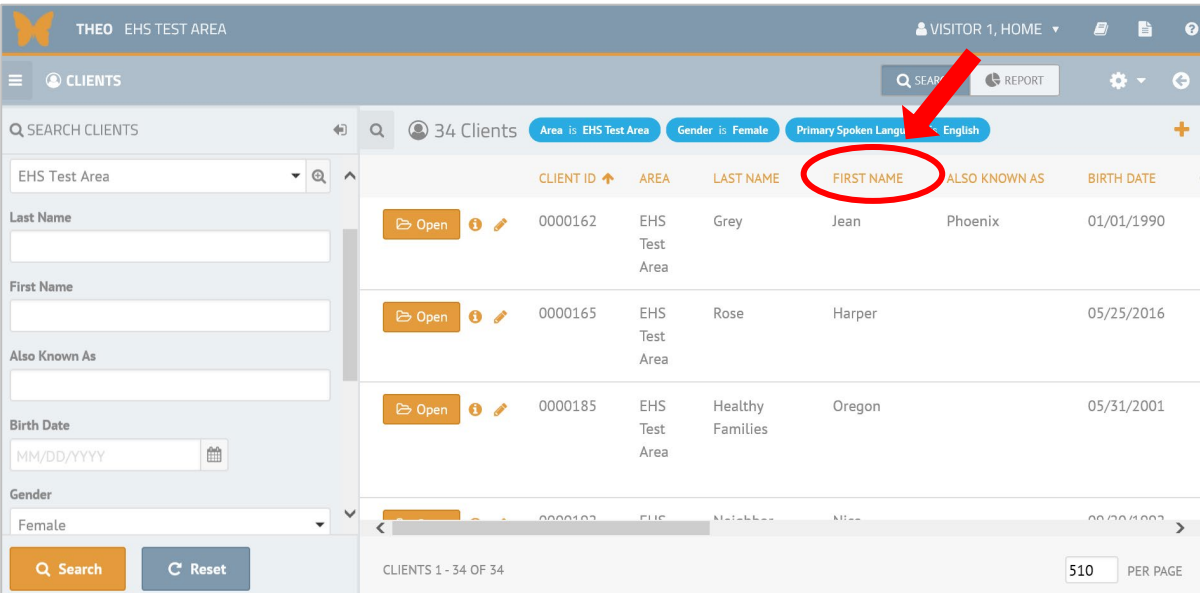
CLIENT ID	AREA	LAST NAME	FIRST NAME	ALSO KNOWN AS	BIRTH DATE
0000162	EHS Test Area	Grey	Jean	Phoenix	01/01/1990
0000165	EHS Test Area	Rose	Harper		05/25/2016
0000185	EHS Test Area	Healthy Families	Oregon		05/31/2001

CLIENTS 1 - 34 OF 34

510 PER PAGE

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

- All column in the results are sortable. Click on the orange First Name column header toward the top of your screen (Figure 3).



THEO EHS TEST AREA

CLIENTS

SEARCH CLIENTS

EHS Test Area

34 Clients

Area is EHS Test Area Gender is Female Primary Spoken Language is English

CLIENT ID	AREA	LAST NAME	FIRST NAME	ALSO KNOWN AS	BIRTH DATE
0000162	EHS Test Area	Grey	Jean	Phoenix	01/01/1990
0000165	EHS Test Area	Rose	Harper		05/25/2016
0000185	EHS Test Area	Healthy Families	Oregon		05/31/2001

CLIENTS 1 - 34 OF 34

510 PER PAGE

Figure 3: Search Clients – Sort by First Name column

Figure 4 shows the client records sorted by the First Name column, from A to Z.

- Click on the column name again to sort the records in the opposite order, from Z to A.
- All columns in the results are sortable by clicking on the column name.

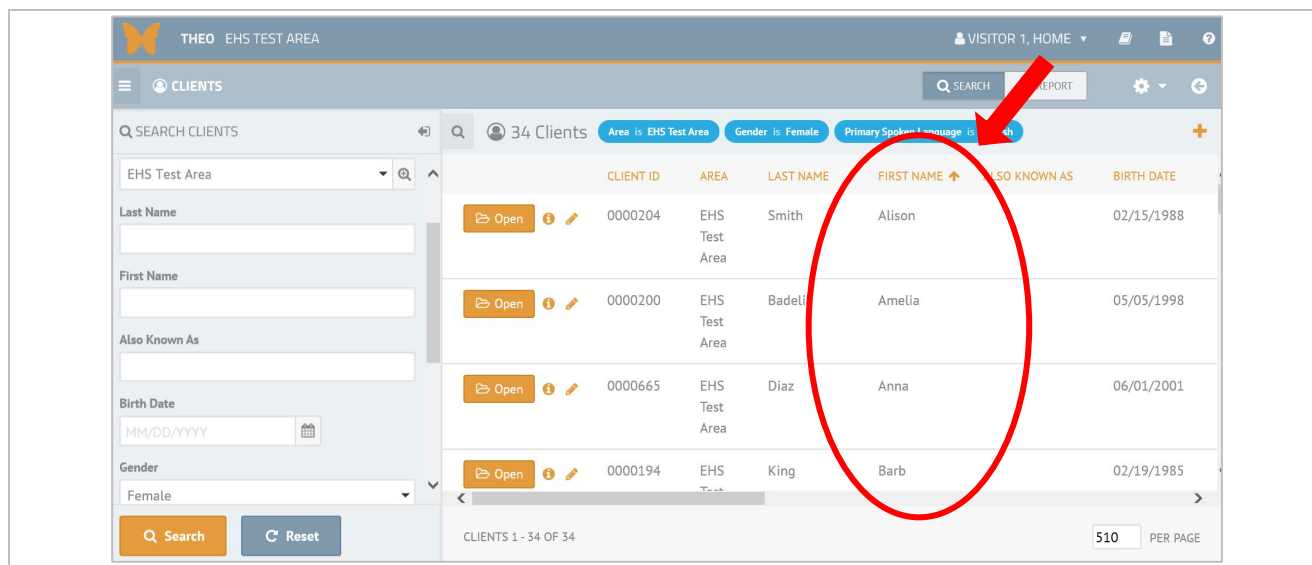


Figure 4: Search Clients – First Name column sorted from A to Z

6.5 Download results in a data file

After you search and find data, you can save the data as a file and/or print the data.

- Continuing from the previous section, mouse over the orange Gear/Daisy icon to open the Actions menu in the upper right of your screen (Figure 1).
- Click on “Download” to select it from the drop-down menu.

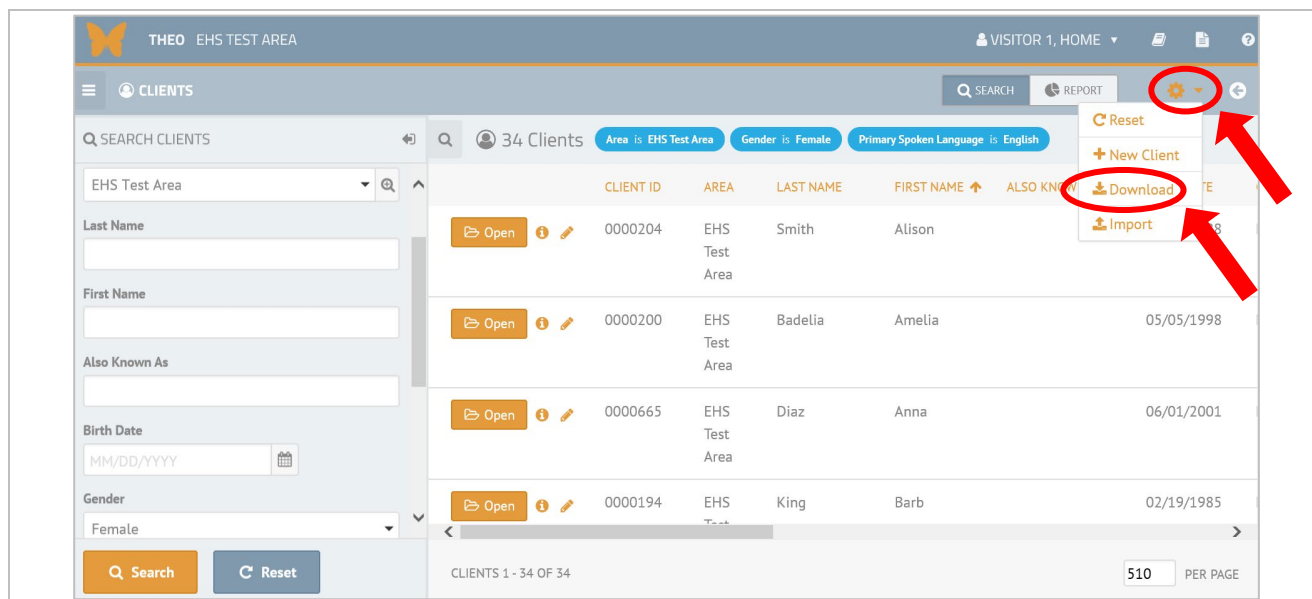


Figure 1: Search Clients screen – Select “Download” on the Actions menu

Note: The next set of steps will vary according to the internet browser you are using.

- Some browsers show a message in the lower part of the screen asking if you want to open or save the file. Click on the arrow to the right of save and select “Save As” (Figure 2).
- Continue to save the file to a secure directory as you would do normally.

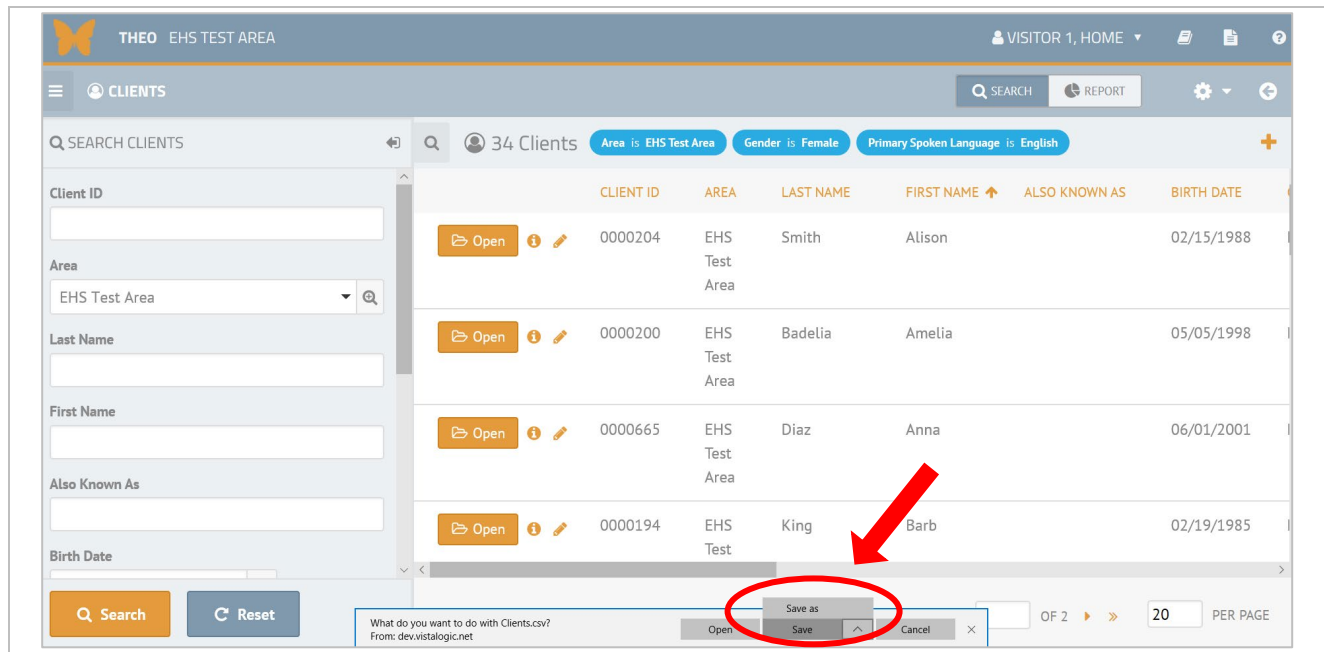


Figure 2: Download message – Save As

- Other browsers open the data file as a .csv file in Microsoft Excel (Figure 3).
- Print or save the file as you do normally on your system.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
	Client ID	Area	Last Name	First Name	Middle Name	Prefix	Suffix	Also Known As	Birth Date	Gender	Primary Language	Secondary Language	Preferred Language	Requires Alternate	Local Client	Medicaid	Contact Person	Special Instructions	Person	Ethnicity		
2	204	EHS Test #	Smith	Alison					5/5/1998	Female	English	Spanish								Smith, Ali	Not Hispanic or Lat	
3	200	EHS Test #	Badelia	Amelia					6/1/2001	Female	English	Spanish	English							Badelia, A	Declined to self-id	
4	665	EHS Test #	Diaz	Anna						Female	English	Spanish								Diaz, Anni	Hispanic or Latino/	
5	194	EHS Test #	King	Barb						Female	English									King, Barb	Not Hispanic or Lat	
6	564	EHS Test #	Smyth	Danica				Dani		Female	English	English	English	No						Smyth, Da	Not Hispanic or Lat	
7	407	EHS Test #	Smith	Danielle				Dani	1/1/2000	Female	English									Smith, Dai	Not Hispanic or Lat	
8	165	EHS Test #	Rose	Harper						Female	English	Spanish								Rose, Har	Not Hispanic or Lat	
9	162	EHS Test #	Grey	Jean				Phoenix	1/1/1990	Female	English									Grey, Jear	Not Hispanic or Lat	
10	651	EHS Test #	Garcia	Maricella						Female	English	Spanish	English	No						Garcia, Mi	Hispanic or Latino/	
11	613	EHS Test #	Martinez	Marta						Female	English	Spanish	English							Martinez, M	Hispanic or Latino/	
12	614	EHS Test #	Martin	Michelle					6/5/2001	Female	English	Spanish		No						Martin, M	Hispanic or Latino/	
13	202	EHS Test #	Smith	Poppy					6/6/1988	Female	English	English	English	No						Smith, Poi	Not Hispanic or Lat	
14	414	EHS Test #	Johnson	Samantha		Mrs.		Sam		Female	English									Johnson, J	Not Hispanic or Lat	
15	572	EHS Test #	Jones	Samantha						Female	English	English	English	No						Jones, Sar	Declined to self-id	
16	511	EHS Test #	Johnson	Sophia				Sophie		Female	English									Johnson, J	Not Hispanic or Lat	

Figure 3: Microsoft Excel opens the .csv file

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 drives 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, charts, graphs, or worksheets that you add to a .csv file will be lost when you close the file.