

The Redesigned Needs Portal User Guide

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Family Peer Mentor

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Caseworker New Needs Portal User Guide

Hello! Welcome to the new Needs Portal! If you have any questions, please reach out to the Needs Portal Team at needsportal@osu.edu. We also have a series of brief video tutorials available that you can access on Youtube at this link <https://www.youtube.com/channel/UClyzccwf7M1ZQ4UHPULAmag> or via the FAQ tab of the Needs Portal.

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Navigating the Redesigned Needs Portal

The main menu at the top of your screen will let you navigate to all the pages you need, such as entering demographic information about a family. There are seven options on the main menu:

1. “Families” allows you to view the list of all families, or cases, in the Needs Portal that are assigned to you. From this page, you can also add new families, edit existing families, refer them to Ohio START or EPIC, and add drug screenings.
2. “Program Terms” allows you to see the list of your assigned families that are participating in the OhioSTART or EPIC programs. From this page, you can edit a family’s program term, enter required program information (such as ACE Questionnaires and CTACs) and refer individuals and families to service providers and family peer mentors.
3. “UNCOPE Only” allows you to enter UNCOPEs for individuals that are not eligible for OhioSTART or EPIC programs, declined to participate in OhioSTART or EPIC, or for the ECI program.
4. “All Mentor Referrals” allows you to view every family peer mentor referral for your assigned cases. The “Referral State” column shows the status of each referral.
5. “Accepted Mentor Referrals” shows you all the referrals that family peer mentors have accepted. You can view the contact visits by clicking the blue “Contact Log” link.
6. “All Service Referrals” allows you to view all the service referrals for your assigned cases. Please look under the “Referral State” column to view the status of the referral.
7. “Accepted Service Referrals” shows you the referrals that service providers have accepted. This is where you can access and update service logs.

The buttons at the top right-side of your screen allow you to edit your information in the Needs Portal and find others in the Needs Portal.

1. The “My Account” button allows you to view and edit your “About Me” information as it appears in the Needs Portal directory.
2. The “Directory” button will allow you to find others in the Needs Portal. You can filter by role and agency name and then click “Apply” to search through the filters you’ve set.
3. The “FAQ” link has frequently asked questions and links to training videos.

How To Enter a New Family in the Needs Portal:

Step 1: On the main menu, select “Families”.

*****Needs Portal Tip:** As a default, this table shows families that are active in the program. To see families with a program close date, click “Filter Results” to change default filters. Change “Has program close date” to -Any- to see families regardless of program closure status.

Step 2: Select the blue “Add Family” button.

Step 3: Check to make sure the “County”, “Caseworker”, and “Language” are correct.

Step 4: In the “SACWIS INFO” box, please enter the “SACWIS Case ID”, select the type of case from the “SACWIS Case Type” drop-down menu, and enter the “SACWIS Open Date.”

Step 5: In the “What are the Service Needs of the Family?” field, please enter a brief description of the service needs of the family

Step 6: Please enter the required demographic information of the first adult in the family:

1. Their first name and last initial
2. Select their role in the family
 - a. When selecting “Other” a text box will appear. Please enter the individual’s role in the family. Ex: Maternal Grandmother
3. The individual’s date of birth
4. The individual’s zip code
5. Select their insurance
6. Select their gender
7. Select if they are Hispanic or Latino or Spanish origin
8. Select their race (please check off all that apply)

Step 7: If the individual has completed a drug screen, please click on “Add a New Drug Screening”

1. Enter the date of the drug screen
2. Under “Positive?” check “Yes” if the drug screen was positive and “No” if it was not positive.

3. Click the “Create Drug Screen” button to record the screening results

Step 8: Click “Create Individual” at the bottom of the screen.

Step 9: Please select “Add new individual” to add a new individual to the family. Keep in mind that in order to refer a family to Ohio START or EPIC, there must be at least one adult and one child recorded in the family record.

Step 10: After creating all of the individuals in the family, click the blue “Save” button at the bottom of the screen. This will take you to the family’s summary page.

*****Needs Portal Tip:** To edit any information you just entered or to add additional family members after you have saved the family, click the “Edit” (next to the “View” tab) to edit information.

How To Add Families to OhioSTART or EPIC Programs

Step 1: On the main menu, select “Families”.

Step 2: Under the “Families” column, click on the blue “Family” link for the family you would like to refer to a program. This will take you to the family’s summary page in “Program Terms”.

Step 3: Under the “Program Terms” box, click the blue “Refer to OhioSTART” or “Refer to EPIC” button.

*****Needs Portal Tip:** Each family must have at least one adult and one child to be eligible to be referred to a program in the Needs Portal. If the family’s record doesn’t include at least one adult and one child, the blue “Refer to” buttons will not appear.

Step 4: In the “Referral Date”, enter the date the family was referred to the program

Step 5: Enter the date of the first shared decision making meeting

Step 6: In the “Notes” field, please enter any notes for the program referral.

Step 7: Click the blue “Save” button at the bottom of the screen. You are now on the family’s program term page.

*****Please note:** There are different steps for enrolling adults and children.

Enrolling an Adult:

Step 8: Under the “Participants” box, click “Add (Adult’s Name)” to add that individual to the program. This will bring you to a new page.

Step 9: Under the “Enroll” tab, check “Yes”, “No”, or “N/A” for if the participant “Verbally Agreed to Participate” in the program.

Step 10: Enter the “Date Agreement Signed”

Step 11: If the adult is not participating in the program, please choose the reason from the “Reason Not Participating” drop-down menu. If the adult is participating, please leave the field as “None”.

Step 12: Select the primary substance(s) the individual uses from the drop-down menu.

*****Needs Portal Tip:** Leave the “Program End” tab blank for now. This will need to be filled in when closing out a program.

Step 13: Click the blue “Save” button at the bottom of the screen. This will take you back to the family’s program term page.

Step 14: Under the “Participants” box, you will see the participant you just added.

Enrolling a Child:

Step 15: Under the “Participants” box, click “Add (Child’s Name)” to add that individual to the program. This will bring you to a new page.

Step 16: Under “[Child Only] Allegation”, check all the allegations that apply.

Step 17: Select where the child is placed in the “[Child Only] Home Placement” drop-down menu. If you select “Other”, a text box will appear where you can provide more detail.

Step 18: Click the blue “Save” button at the bottom of the screen. This will take you back to the family’s program term page. Under the “Participants” box, you will now see the participant you just added.

*****Needs Portal Tip:** On the right side of a participant’s row, you will see an “Edit” box. Click the box if you need to edit any of the individual’s enrollment information.

Entering Assessments

Now that we’ve referred family members to the program, we need to enter assessment information. Adults and children will have different assessments listed under the “Assessments” column. Each assessment can be accessed by clicking on the blue link.

UNCOPE

Step 1: Click the blue “UNCOPE” link under the participant’s “Assessments” column.

Step 2: Click “Add UNCOPE” button

Step 3: In “Date administered”, enter the date of the UNCOPE screening

Step 4: Enter “Yes” or “No” to every UNCOPE question. The score will automatically calculate as the questions are answered.

Step 5: Click the blue “Save” button at the bottom of the screen. This will take you back to the family’s program term page so that you can enter other assessments.

ACE

Step 1: Click “ACE Questionnaire” under the participant’s “Assessments” column.

Step 2: Click “Add ACE Questionnaire” button

Step 3: In “Date administered”, enter the date of the ACE screening

Step 4: Enter “Yes” or “No” to every ACE question. The score will automatically calculate as the questions are answered.

Step 5: Click the blue “Save” button at the bottom of the screen. This will take you back to the family’s program term page.

VOCA Direct Services

Please see page 20 for more details on entering VOCA information.

Types of Victimization

Step 1: Click “Types of victimization” under the participant’s “Assessments” column.

Step 2: Click “Add Types of Victimization” button

Step 3: In “Date administered”, enter the date

Step 4: Check all types of victimization that apply. If none apply, please check N/A.

1. If you have checked “Hate Crime” please give more detail in the “Hate Crime explanation” field.
2. If you have checked “Other” please give more detail in the “Other” field.

Step 5: Please choose if the individual belongs to any special class of individual by selecting from the “Special classification of individuals” drop-down menu. If they do not, please select “N/A”.

Step 6: Click the blue “Save” button at the bottom of the screen.

CTAC

Step 1: Both CTACs (0-5 years old and 6-18 years old) will appear in a child's "Assessments" column. Please click on the correct CTAC for the child's age.

*****Needs Portal Tip:** If you click on the incorrect CTAC link, you will notice that the CTAC button will say "wrong age". Just use the back button in your internet browser to go back to the family's summary page.

Step 2: Click "Add Ages CTAC"

Step 3: In "Date administered", enter the date of the CTAC screening

Step 4: Select "Yes" or "No" for all the questions in the "Are you aware of or do you suspect the child has experienced any of the following:" box.

Step 5: Check all that apply for the rest of the CTAC questions. If you have checked "Other", please give more detail in the text box that appears below.

Step 6: Click the blue "Save" button at the bottom of the screen.

How to Refer to a Service Provider

*****Needs Portal Tip:** The new Needs Portal can capture multiple service dates for each referral. For OhioSTART, this means there should be one SUD service treatment referral for the participating adult under which the first 5 service dates are logged.

Step 1: On the main menu, select “Program Terms”.

Step 2: Click on the family’s blue program term link under the “Program Term” column.

Step 3: Scroll down to the “Service Referrals” box and click the blue “Add Service Referral” button.

*****Needs Portal Tip:** There are two ways to enter service referrals into the Needs Portal. The first way is if the service provider is listed in the Needs Portal. The second way is if the service provider is *not listed* in the Needs Portal.

If the service provider is listed in the Needs Portal:

Step 1: Choose the county of the service location from the “Provider Location” drop-down menu.

Step 2: Select the category of service from the “Service Categories” drop-down menus. While it is possible to choose multiple service categories, it is best practice to choose only one service category per referral.

Step 3: Under “Provider Name”, click “Select providers”. This opens a window where you can filter service providers by searching their name, location, and service categories. When you have entered the filter information, click “Apply”.

Step 4: Click the radio button beside the service provider’s name, then click the blue “Select service provider” button. You will then see this service provider in the “Provider Name” box.

Step 5: Check the participant(s) you are referring. If the referral is for the whole family, check the “This referral is for the whole family” box.

Step 6: Enter service notes in the “Notes” field.

Step 7: Click the blue “Save” button at the bottom of the page. This will take you back to the family’s program term. In the “Service Referrals” box, you will see this referral. The “Referral State” is “waiting” until the service provider either accepts or denies the referral request.

If the service provider is *not* listed in the Needs Portal:

Step 1: Choose the county of the service location from the “Provider Location” drop-down menu.

Step 2: Select the category of service from the “Service Categories” drop-down menus.

Step 3: Check the “Provider Missing?” box.

Step 4: Enter the name of the service provider in the “Provider Name” field.

Step 5: Check the participant(s) you are referring. If the referral is for the whole family, check the “This referral is for the whole family” box.

Step 6: Enter service notes in the “Notes” field.

Step 7: Click the blue “Save” button at the bottom of the page. This will take you back to the family’s program term. Under the “Service Referrals” box, you will see that the referral has been automatically accepted.

How To Enter Service Dates for Substance Use Disorder

Services

Step 1: On the main menu, select “Program Terms”.

Step 2: Click on the family’s blue program term link under the “Program Term” column.

Step 3: In the “Service Referrals” box, click “Service Log” to enter service dates for that referral. This will take you to the service referral’s page (details and service log).

Step 4: In the “Service Log” box, click “Log Service Date”.

Step 5: Click the “Add New Service Date” button

Step 6: Enter the date of the service in the “Service Date” box

Step 7: Select the location of the treatment from the “Location of Services” drop-down menu. If “Other” is selected, please provide more detail in the text box.

Step 8: Please enter any notes for the visit in the “Notes” box.

Step 9: Click “Create Service Date” to log the service log entry

Step 10: Click “Add new service date” and repeat the process for each additional service date you want to record.

Step 11: To edit a previously entered service date, please click “Edit” under the “Operations” column. To remove a previously entered service date, please click “Remove” then “Remove” again.

Step 12: Click the blue “Save” button at the bottom of the screen when you have finished entering service dates. This will take you back to the service referral’s details and service log page.

*****Needs Portal Tip:** To find a specific service date, click “Filter Results” in the “Service Log” box. Select the location of the service from the “Location of Services” drop-down menu. In the “Notes” field, enter a keyword from the specific service date you are looking for. Click “Apply”.

Refer to a Family Peer Mentor

Step 1: On the main menu, select the “Program Terms”.

Step 2: Click on the family’s blue program term link under the “Program Term” column.

Step 3: In the “Mentor Referrals” box, click the blue “Add a mentor” button.

Step 4: Under “Share with,” select the family peer mentor from the drop-down menu.

Step 5: Under “Participant(s),” check the participant(s) you would like to refer to the family peer mentor. **Note, you can select multiple participants to refer.

Step 6: In the “Notes” box, please enter notes about the individual(s) to share with the family peer mentor.

Step 7: Click the blue “Save” button at the bottom of the screen. It will take you back to the family’s program page. The mentor referral will show that the referral state is “waiting” until the family peer mentor accepts or denies the referral request.

How to Close Out a Family's Program Term

Step 1: On the main menu, select the "Program Terms".

Step 2: Click on the family's blue program term link under the "Program Term" column.

Step 3: Scroll down to the "End Program Term" box and click the green "End Program Participation" button.

You will begin by entering some program closure information for the family as a whole.

Step 4: Enter the date the program term closed.

Step 5: Under "End/discharge reason," select the reason for the program closure from the drop-down menu. Use the scroll bar to see the full list of available options.

Step 6: Under "Child Placement Status at Program End," select from among the child placement statuses listed. If multiple children in the family have different placement outcomes, select all that apply.

Next, you will answer Participant Exit Questions for each participating adult in the family. Each adult is listed separately.

Step 7: For the named individual, record the date this adult ended their participation. Note that adults in a family may end their participation on different dates.

Step 8: Answer "What is the adult's status regarding sobriety?" by picking a choice from the drop-down menu.

Step 9: Enter the number of months that this adult sustained sobriety and early recovery at discharge. *If unknown, enter "-1".*

Step 11: Indicate whether this adult is involved in MOUD/MAT by checking "Yes," "No," or "Unknown".

Step 12: If the individual is involved in MAT/MOUD, enter the number of months of appropriate MOUD/MAT use.

Step 13: To add information on treatment(s) that the adult participated in during the program term, click the “Add treatment modality” button. This will expand the Treatment Modalities section.

Step 14: Under “Treatment Modalities” please...

1. Select the type of SUD/MH Treatment from the drop-down menu.
2. Select the discharge status for this treatment from the drop-down menu. If “other”, provide details in the associated text box.

Step 15: If the individual engaged in more than one treatment modality, please click “Add treatment modality” again and enter the information as described above. Repeat as needed until all treatment modalities for the individual have been entered.

Step 16: Repeat this process for each participating adult in the family.

Step 17: When you have answered exit questions on all participants, click the blue “Save” button at the bottom of the screen. This will take you back to the family’s program term. If you scroll down, you will see a summary of the end program term data, with a button to edit this information if needed.

Ending Program Participation for One Adult

In the new Needs Portal, it is possible to end one adult’s participation in the program early, while the rest of the family continues to participate.

Step 1: On the main menu, select the “Program Terms”.

Step 2: Click on the family’s blue program term link under the “Program Term” column.

Step 3: Under the “Participants” box, click the “Edit” box for the participant on the right side of screen.

Step 4: Click on the “Unenroll Participant” tab.

Step 5: Enter the date the adult ended their participation in the program term.

Step 6: Select the reason the adult ended participation from the “Adult’s reason for leaving” drop-down menu. If “Other” is selected as the reason for leaving, a text box will appear. Please give more detail in the text box.

Step 7: Click the ‘Add End questions’ button. This will expand the End Questions section.

1. Under “What is the adult’s status regarding sobriety?” please pick a choice from the drop-down menu.
2. Enter the number of months that this adult sustained sobriety and early recovery at the time they left the program term. *If unknown, enter “-1”.*
3. Indicate whether this adult is involved in MOUD/MAT by checking “Yes,” “No,” or “Unknown”.
4. If the individual is involved in MAT/MOUD, please enter the number of months of appropriate MOUD/MAT use.

Step 8: To add information on any treatment(s) that the adult participated in during the program term, click the “Add treatment modality” button. This will expand the Treatment Modalities section.

1. Select the type of SUD/MH Treatment from the drop-down menu.
2. Select the discharge status for this treatment from the drop-down menu. If “other”, provide details in the associated text box.

Step 9: If the individual engaged in more than one treatment modality, please click “Add treatment modality” again and enter the information as described above. Repeat as needed until all treatment modalities for the individual have been entered.

Step 10: Click “Save” at the bottom of the screen

Enter the SACWIS Close Date

Step 1: On the main menu, select “Families”.

Step 2: Click the “Edit” box (right side of page) for the family you’d like to update.

Step 3: Enter the SACWIS Close Date

Step 4: Click the blue “Save” button at the bottom of the screen.

How to Enter an “UNCOPE Only”

Step 1: On the main menu, select “UNCOPE Only”.

*****Needs Portal Tip:** To view a previously entered UNCOPE Only, please click on the blue link under the “Title” column. To help you locate a previously entered UNCOPE Only, you can sort by column headings (caseworker, SACWIS open date, or post date) or filter by caseworker or SACWIS case ID.

Step 2: Click “Administer UNCOPE Only”

Step 3: County and caseworker will pre-fill. Check the entries in those boxes and change if needed.

Step 4: Enter the SACWIS Case ID and the date the SACWIS case was opened

Step 5: In the “Reason Client Not Participating” box, select the reason the individual was not referred to a program (OhioSTART or EPIC). If the reason is “Other”, please describe in the text box. If the individual was referred to a program but declined to participate, please select “Referred – but declined to participate”.

Step 6: Enter the individual’s first name and last initial

Step 6: Select the individual’s family role. If “Other”, describe in text box.

Step 7: Enter the individual’s date of birth

Step 8: Enter the individual’s zip code.

Step 9: Select the individual’s gender

Step 10: If the individual has completed a drug screening, click the “Add new drug screening” button. Please enter the date of the drug screen and answer whether the drug screen was positive. Then click the “Create Drug Screening” button to record the screening results.

Step 11: Enter the date the UNCOPE was administered.

Step 12: Check “yes” or “no” for all UNCOPE questions. The UNCOPE score will automatically calculate as the questions are answered.

Step 13: Click the blue “Save” button at the bottom of the screen to save the UNCOPE Only.

How To Enter VOCA Direct Services

Step 1: On the main menu, select “Program Terms”.

Step 2: Under the “Program Term’s” column, please click on the family’s blue program link under the Program Term column. This will take you to the family’s program page.

Step 3: Scroll down to the “Participants” box. Under the “Assessments” column, please click “VOCA direct services” for the participant you’d like to update.

Step 4: This will take you to a separate page. Click the “Add VOCA direct services” button.

Step 5: Find the category for the VOCA service you would like to enter. For example, if you provided a participant with information about the criminal justice process, you would want to update field A1 under Section A.

Step 6: Use the up or down arrows to change the number of services in that field (or alternatively, update the number by typing into the box).

Step 7: After updating the counts for any services provided, scroll down and click the blue “Save” button.

Family Peer Mentor New Needs Portal User Guide

Hello! Welcome to the new Needs Portal! If you have any questions, please reach out to the Needs Portal Team at needsportal@osu.edu. We also have a series of brief video tutorials available that you can access on the FAQ tab of the Needs Portal.

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Navigating the Redesigned Needs Portal

The main menu at the top of your screen will let you navigate to all the pages you need, such as entering FPM contact visits. In the new Needs Portal, FPM have access to more information. There are six options on the main menu:

1. “Program Terms” allows you to view information about your mentee families that are enrolled in OhioSTART or EPIC programs.
 - a. Click the blue link under the “Program Term” column to view information about the participation in OhioSTART or EPIC programs, such as which family members are participating in the program.
 - b. Click the blue link under the “Family” column to view more details about the family, such as their service needs.
2. “All Mentor Referrals” allows you to view every referral sent to you. The “Referral State” column shows the status of the referral.
3. “Accepted Mentor Referrals” shows you all the referrals you have accepted. This is where you will log weekly contacts.
4. “All Service Referrals” allows you to view all the service referrals for your mentee families. The “Referral State” column shows the status of each referral.
5. “Accepted Service Referrals” shows you the service referrals for your mentee families that have been accepted by a service provider. This is where you can log service dates.
6. “Accept/Deny Referrals” is where you will review and either accept or deny your pending referrals.

The buttons at the top right side of your screen allow you to edit your information in the Needs Portal and find others in the Needs Portal.

1. The “My Account” button allows you to view and edit your “About Me” information as it appears in the Needs Portal.
2. The “Directory” button will allow you to find others in the Needs Portal. You can filter by role and agency name, and then click “Apply” to search through the filters you’ve set.
3. The “FAQ” link has frequently asked questions and links to training videos.

How to Accept or Deny a Mentor Referral Request

Step 1: On the main menu, click “Accept/Deny Referrals”. You will see all referrals that are pending (waiting on your response).

*****Needs Portal Tip:** In the new Needs Portal, caseworkers can refer one or more individuals in the family or the entire family to FPMs.

1. The table shows each pending referral, the caseworker who is making the referral (inviter), and which participants in the family the referral is for.
2. Click the “view” button on the far right to see more information about the referral, such as caseworker notes. When you are finishing viewing, please click the back button in your internet browser.

Step 2: Click either “Accept” or “Deny” on the right side of the referral to respond. If you click “Accept”, the card will disappear from your pending referral list and will be added to your “Accepted mentor referrals” list.

Step 3: If you deny a referral request, a page will pop up asking you for the reason for denying the referral. Please enter the reason then click “Submit.”

How To Enter Mentor Contacts

Step 1: On the Main Menu, click “Accepted Mentor Referrals”.

*****Needs Portal Tip:** As a default, this table shows referrals for families that are currently active in the program. To see families that have a program close date, click “Filter Results” to change default filters. Change “Has program close date” to -Any- to see referrals regardless of program closure status.

Step 2: Each row is a separate referral. On the right side of the referrals, click the blue “Contact Log” link to see details on the referral (including the caseworker note) and to access the contact log.

Step 3: Scroll down to the “Contact Log” box. This is where all contacts you have entered for this referral are displayed.

*****Needs Portal Tip:** Under the “Log Contact” button, use the “Date Range” and “Method of Contact” boxes to filter previous contact entries.

Step 4: Click the blue “Log Contact” button (in the Contact Log box) to record contacts.

Step 5: Click the “Add New Contact” button. This will open up a form to enter the information on this contact:

- 1) Enter the date of the contact.
- 2) Enter the length of the visit in hours and minutes.
- 3) In the “Who was present” box, select all program participants (adults and children) that were present for the contact.
- 4) Check the “Caseworker present?” box if the caseworker was present for the contact.
- 5) Check the “Unsuccessful attempt” box if you attempted to contact the participant without success.
- 6) Check the “Secondary Contact” box for collateral contacts, for example if you are contacting a service provider on behalf of the participant, but the participant is not present.

- 7) In the “Who was late” box, select which adult participants (if any) were late to the contact.
- 8) In the “Who was invited yet failed to show up” box, select which participants (if any) did not show up.
- 9) Select the “Method of contact” from the drop-down menu. If “other” describe in the associate text box.
- 10) Describe where the visit took place, what was discussed, what are the next steps, and notes in the corresponding boxes.

Step 6: Click “Create Contact” at the bottom. You then will see the contact added to the list of entries.

Step 7: To enter another contact visit, click the “Add new Contact” button and repeat the steps above.

*****Needs Portal Tip:** To edit an entered contact, click the “Edit” button on the contact visit’s row to edit a previously entered contact. To delete a contact, click “Remove” and then click “Remove” again to confirm or “Cancel”.

Step 8: Click the blue “Save” button when finished entering contacts.

*****Needs Portal Tip:** To view the notes and all of the other information entered in the Contact Log, click the “Edit” button on that visit’s row.

How To Enter Service Dates for Substance Use Disorder Treatment

Step 1: On the main menu, select “Accepted Service Referrals”. On this screen, you will see accepted service referrals on family program terms for which you are the assigned mentor.

*****Needs Portal Tip:** This list defaults to show referrals on program terms that are currently active. To see referrals for participants that have a program close date, click “Filter Results” to change default filters. Change “Has program close date” to - Any- to see referrals regardless of program closure status.

Step 2: Each row is a unique referral. On the far right side, click the blue “Service Log” link to see details on the service referral (including the caseworker note) and to access the service log.

Step 3: Scroll down to the “Service Log” box. Click the blue “Log service date” button to enter service dates.

Step 4: Click the “Add new service date” button. This will open up a form to enter the information on this service date:

1. Enter the service date in the “Service date” field.
2. Select the location of the service from the “Location of Services” drop-down menu. If you select “Other”, please give more detail in the text box.
3. In the “Notes” field, enter any notes for the service date.

Step 5: Click the “Create Service Date” button. You will then see the service date added to the list of entries.

Step 6: To enter another service date, click the “Add new service date” and repeat the steps above.

*****Needs Portal Tip:** To edit a previously entered service date, please click “Edit” under the “Operations” column. To delete a contact, click “Remove” and then click “Remove” again to confirm or “Cancel”.

Step 10: Click the blue “Save” button when you are done entering service dates. This will take you back to the service referral page.

*****Needs Portal Tip:** To find a specific service date, click “Filter Results” in the “Service Log” box. Select the location of the service from the “Location of Services” drop-down menu. In the “Notes” field, enter a keyword from the specific service date you are looking for. Click “Apply”.

Service Provider New Needs Portal User Guide

Hello! Welcome to the new Needs Portal! If you have any questions, please reach out to the Needs Portal Team at needsportal@osu.edu. We also have a series of brief video tutorials available that you can access on the FAQ tab of the Needs Portal.

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Navigating the Redesigned Needs Portal

The main menu at the top of your screen will let you navigate to all the pages you need, such as entering service dates. There are two options on the main menu.

1. “Accepted Service Referrals” allows you to view referrals you have already accepted. This is where you will enter service dates.
2. “Accept/Deny Referrals” lists pending referrals (referrals that need a response). This is where you will either accept or deny service referrals.

The buttons at the top right side of your screen allow you to edit your information in the Needs Portal and find others in the Needs Portal.

1. The “My Account” button allows you to view and edit your “About Me” information as it appears in the Needs Portal directory.
2. The “Directory” button will allow you to find others in the Needs Portal. You can filter by role and agency name and then click “Apply” to search through the filters you’ve set.
3. The “FAQ” link has frequently asked questions and links to training videos.

How To Accept or Deny Service Referrals

Step 1: On the main menu, select “Accept/Deny Referrals”. This page displays all referrals that are waiting for your action (pending your acceptance or denial).

*****Needs Portal Tip:** Service Providers receive an email notification for a pending service referral. You can also click the link in the email to respond to the referral.

Step 2: Pending service referrals are presented as “cards”. On the card, you will see information about this referral, including who is making the referral (the inviter), the type of service(s) needed, caseworker notes on the general service needs of the family and notes related specifically to this referral, and some basic information on the participants who are being referred (first name and last initial, gender, age, insurance, and zip code).

Step 3: Click either the blue “Accept” button or the red “Deny” button to respond to the referral. If you click “Accept”, the card will disappear from your pending referral list and will be added to your “Accepted service referrals” list.

Step 4: If you click “Deny”, a page will appear asking you for the reason for denying the referral. Please enter the reason in the “Reason for Denial” field and then click “Submit”.

*****Needs Portal Tip:** As a default, “Accept/Deny Referrals” screen shows referrals for program participants that are active. To see referrals for participants with a program close date, click “Filter Results” to change default filters. Change “Has program close date” to -Any- to see referrals regardless of program closure status.

How To Enter Service Dates for SUD

Step 1: On the main menu, select “Accepted Service Referrals”. On this screen, you will see a table of all service referrals you have accepted for participants still active in the program.

*****Needs Portal Tip:** To see participants that have a program close date, click “Filter Results” to change default filters. Change “Has program close date” to -Any- to see referrals regardless of program closure status.

Step 2: Each row is a unique referral. On the far right side, click the blue “Service Log” link to see details on the service referral (including the caseworker note) and to access the service log.

Step 3: Scroll down to the “Service Log” box. Click the blue “Log service date” button to enter service dates.

Step 4: Click the “Add new service date” button. This will open up a form to enter the information on this service date:

1. Enter the service date in the “Service date” field.
2. Select the location of the service from the “Location of Services” drop-down menu. If you select “Other”, please give more detail in the text box.
3. In the “Notes” field, enter any notes for the service date.

Step 5: Click the “Create Service Date” button. You will then see the service date added to the list of entries.

Step 6: To enter another service date, click the “Add new service date” and repeat the steps above.

*****Needs Portal Tip:** To edit a previously entered service date, please click “Edit” under the “Operations” column. To delete a contact, click “Remove” and then click “Remove” again to confirm or “Cancel”.

Step 10: Click the blue “Save” button when you are done entering service dates. This will take you back to the service referral page.

*****Needs Portal Tip:** To find a specific service date, click “Filter Results” in the “Service Log” box. Select the location of the service from the “Location of Services” drop-down menu. In the “Notes” field, enter a keyword from the specific service date you are looking for. Click “Apply”.