

Quick Guide to the (redesigned) Needs Portal

Where to	Click on these items	Tips
Add an UNCOPE only	UNCOPE Only > 'Administer UNCOPE Only' button	Use the UNCOPE Only function when you don't refer a family to a program (whether they are eligible or ineligible) or you refer them but they decline to participate.
Add a new family	Families > 'Add family' button	The "Service Needs of the Family" will be visible to mentors and service providers.
Add an individual to a family	Families > Family (#####) > Edit tab (at top of family's page) > 'Add new Individual' button	Click 'Create Individual' for each person and then click 'Save' to update the entire family.
Enroll family in a program	Families > Family (#####) > 'Refer to OhioSTART/EPIC' button	If you don't see a blue 'Refer' button, check that you entered at least one adult and one child for the family, and that the county is correct.
Add individual participants to a program	Families (or Program Terms) > Program Term OhioSTART (#####) > 'Add Participant' buttons	After adding participants, you can complete enrollment, including agreement date and assessment information.
Record assessments such as UNCOPE, ACE, and CTAC	Families (or Program Terms) > Program Term OhioSTART (#####) > UNCOPE or ACE questionnaire or Ages 0 5 CTAC or Ages 6 16 CTAC (all linked to Participant table) > 'Add Assessment' button	Incomplete assessments are marked with a red exclamation point. Completed, scored assessments show the score. If you open a CTAC that doesn't match the age of child, the button will say 'Add CTAC (wrong age)' - just use your browser back button to select the correct CTAC assessment.
Enter Prior Victimization / Special Classification	Families (or Program Terms) > Program term OhioSTART (#####) > Type of Victimization (under Assessments in Participant table) > 'Add Types of victimization' button	If none apply, select N/A under Types of Victimization and Special classification.
Enter VOCA Direct Services	Families (or Program Terms) > Program term OhioSTART (#####) > VOCA Direct Services (under Assessments in Participant table) > 'Add VOCA Direct Services' button	As additional services are provided, you can update these numbers by clicking on the VOCA Direct Services hyperlink in participant table, updating numbers, and clicking Save.
Add a Drug Screen	Families > Family (#####) > Add Drug screening (hyperlink in Family Details table) > 'Add new Drug Screening' button	Alternate navigation - click on Individual's hyperlink, click edit, click 'Add Drug screen' button.
Add an agreement date	Families (or Program Terms) > Program term OhioSTART (#####) > 'Edit' button for participant (in Participants table)	In the new system, we are tracking agreement dates for each adult, rather than just one date for the family.
Share with an FPM (mentor referrals)	Families (or Program Terms) > Program term OhioSTART (#####) > 'Add mentor referral' button	The system emails the mentor prompting them to review and accept/deny the referral.

Where to	Click on these items	Tips
Accept or deny a mentor referral [FPM user]	Accept/deny referrals > Accept hyperlink or Deny hyperlink (in pending referral table)	Click the “View” hyperlink to see caseworker notes. Once accepted or denied, referrals are removed from this page.
Log an FPM contact [FPM user]	Accepted mentor referrals > Contact log hyperlink for family (in accepted referral table) > ‘Log contact’ button > ‘Add new Contact’ button	Alternate navigation - click on family's Program term hyperlink, and click Contact log hyperlink under Mentor referrals > ‘Log contact’ button > ‘Add new Contact’ button. *Be sure to click Save after logging contacts.
View a completed FPM log entry [FPM user]	Accepted mentor referrals > Contact log hyperlink for family (in accepted referral table) > ‘Log contact’ button	
View list of FPM contacts	Program Terms > Program term OhioSTART (#####) > Contact log (under Mentor referrals)	The FPM must accept the referral before they can begin logging contacts.
View notes on an FPM contact	Program Terms > Program term OhioSTART (#####) > Contact log (under Mentor referrals) > ‘see more’	
Refer to a service provider	Families (or Program Terms) > Program term OhioSTART (#####) > ‘Add service referral’ button	If you select a provider name, the system emails the provider. If you check the ‘Provider missing’ box and manually enter the provider’s name, the system will automatically accept that referral and user can enter service dates right away.
Accept or deny a service referral [Provider user]	Accept/deny referrals > ‘Accept’ button or ‘Deny’ button (on the referral card)	Once accepted or denied, the system removes referrals from this pending service referrals page.
Log service dates [Caseworker, FPM, Provider]	Accepted service referrals > Service log (in accepted referral table) > ‘Log service date’ button > ‘Add new Service date’ button	Alternate navigation for caseworkers and FPMs - click on Program term hyperlink, under Service Referrals click Service log hyperlink > ‘Log date’ button > ‘Add new Service date’ button. *Be sure to click Save after logging a service date.
Unenroll a participant (rest of family continues in program)	Families (or Program Terms) > Program term OhioSTART (#####) > ‘Edit’ button for the participant leaving early > Unenroll tab	Click the ‘Add End questions’ button to add details on outcomes for the participant that is leaving early.
Close a program term	Families (or Program Terms) > Program term OhioSTART (#####) > ‘End program participation’ button	You will answer participant exit questions for each adult in the program, including individual outcomes by treatment modality. If an individual ended participation early, their information will display here as well.