S.P.O.A.

Quick Start Guide

& Manual

(Version 2.0)

Interactive Quick Start Guide & Manual

Main Menu

Click the link where you wish to go

Section 1.0: Browser requirements to run SPOA

(Main Menu)

A highly detailed outline of all system requirements to run the SPOA application off of Salesforce.com is provided right here and should be shown to your local IT specialist if your browser is having continuing trouble.

To sum up what is most applicable to SPOA requirements; the compatible browsers include:

- **Google Chrome** (any version)
- **Mozilla Firefox** (version 3.6 and up)
- **Windows Internet Explorer** (8 and up) (the most updated version of 8)
- **Apple Safari** (version 5.0.x and up)

Section 2.0: Your SPOA login site

(Main Menu)

There is now one unified way to access SPOA.

- This official SPOA login page found here.

Section 3.0: SPOA Account Setup

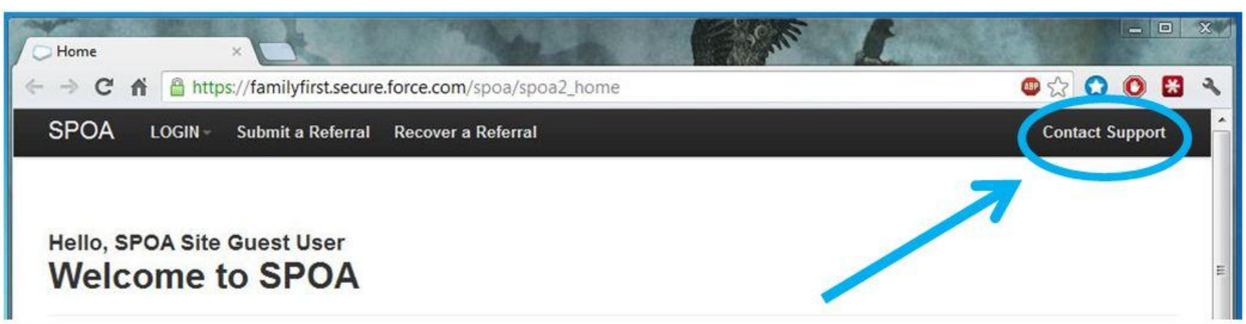
(Main Menu)

For the majority of individuals already associated with SPOA, their SPOA account was created automatically when the system was launched (09-20-2011). It is at this point that an e-mail was generated by the SPOA System to those accounts, to aid them in creating their passwords.

To test if you were one of these accounts, please surf on over to the Password Reset-or-Forgotten page right here, and use your e-mail as your username to attempt to reset your password. At this point, it will either go on to reset your password, or show you an error, stating that your username was not found.

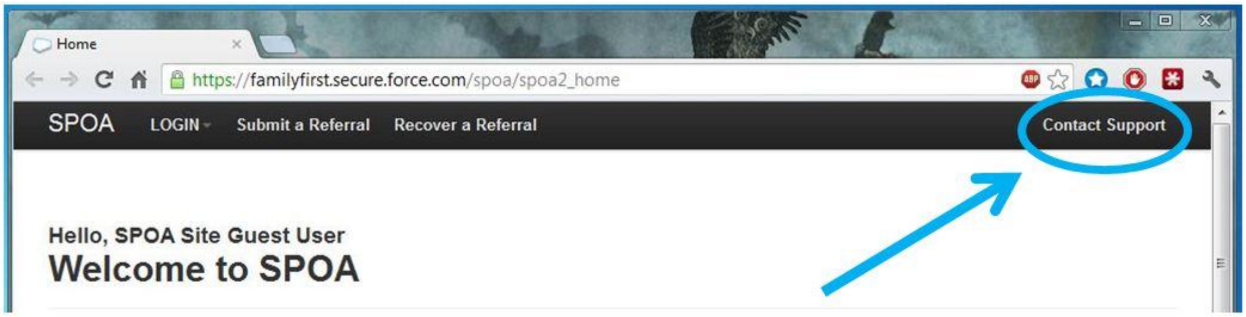
If your username was not found, then please feel free to request your SPOA account by browsing over to the SPOA site and clicking **Contact Support**, as depicted below. **Please include** whether you are requesting access for the purposes of *Housing*, *Care Coordination*, or just the *Authenticated Referrer* role. And don't forget to **include the name of the Organization** you are working for. You will be contacted by the system to make your password when the account goes live.

Note: If you are still having trouble with the account after the steps taken above, please contact us through the **Contact Support** link found at the top of any SPOA page – like in the following picture:



Section 4.0: Reporting issues with the online SPOA system (Main Menu)

To report any issues with the website SPOA system, please contact us through the **Contact Support** link found at the top of any SPOA page – like in the following picture:



This sends a single ticket before the eyes of the entire support team.

Please do not use direct e-mail to any support personnel for any new or aged support request. Only use the **Contact Support** link on your page.

As there is absolutely no way to assure that any single support individual will be present or available for support. But when you submit using the **Contact Support** link, it goes to the entire team, and the first available person takes your case as soon as possible.

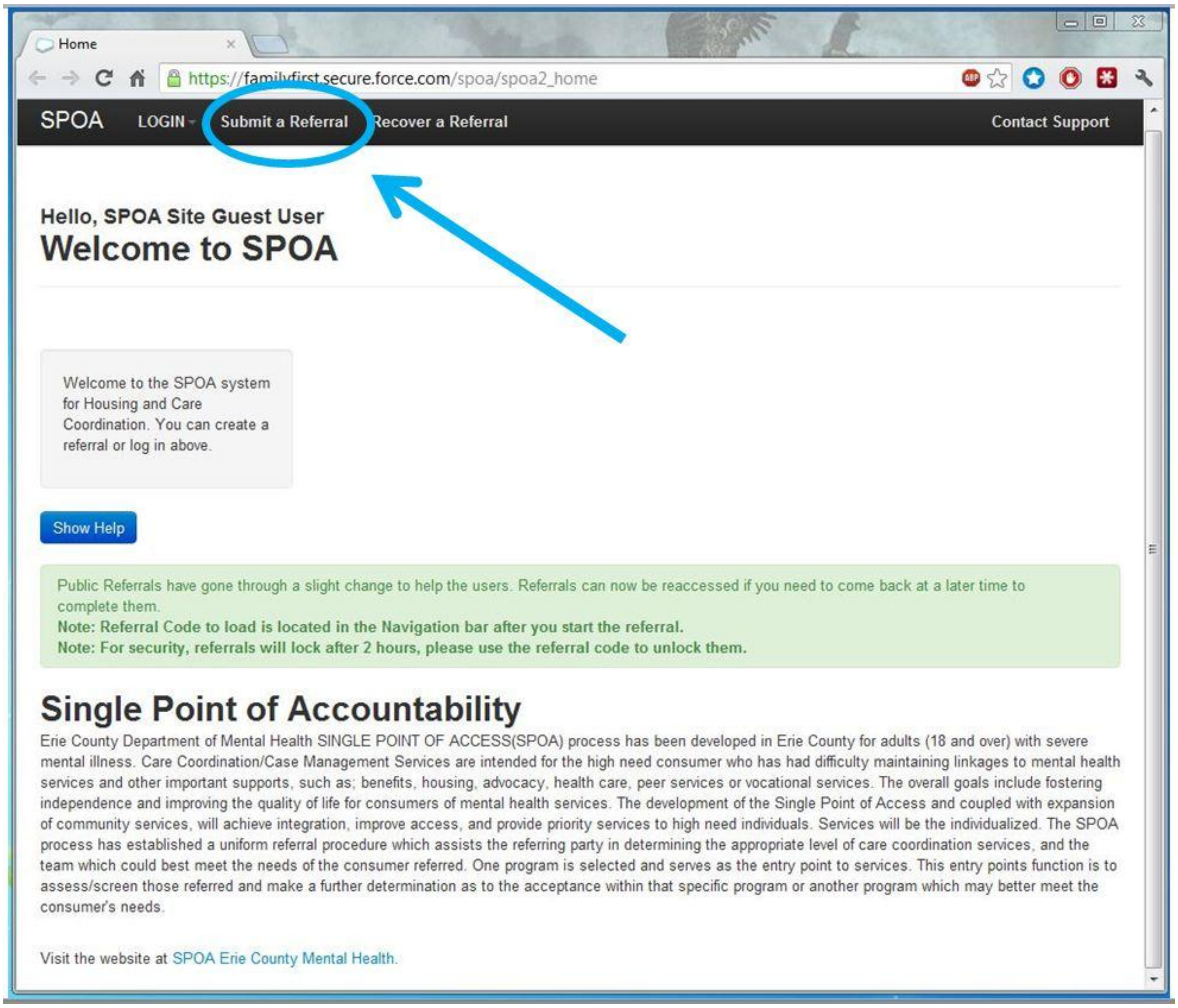
No support can be assured if you do not use the Contact Support link, as the entire team will never see that you're having an issue, nor will there be any record of it other than your e-mail.

When in doubt, use the Contact Support link.

Section 5.0: Quick Start as a Public Referrer

[(Main Menu)]

A public referrer starts out at this web page here, which is also displayed in **(Figure 1)** below, from where they click on the **Submit a Referral** link highlighted therein below.



(Figure 1)

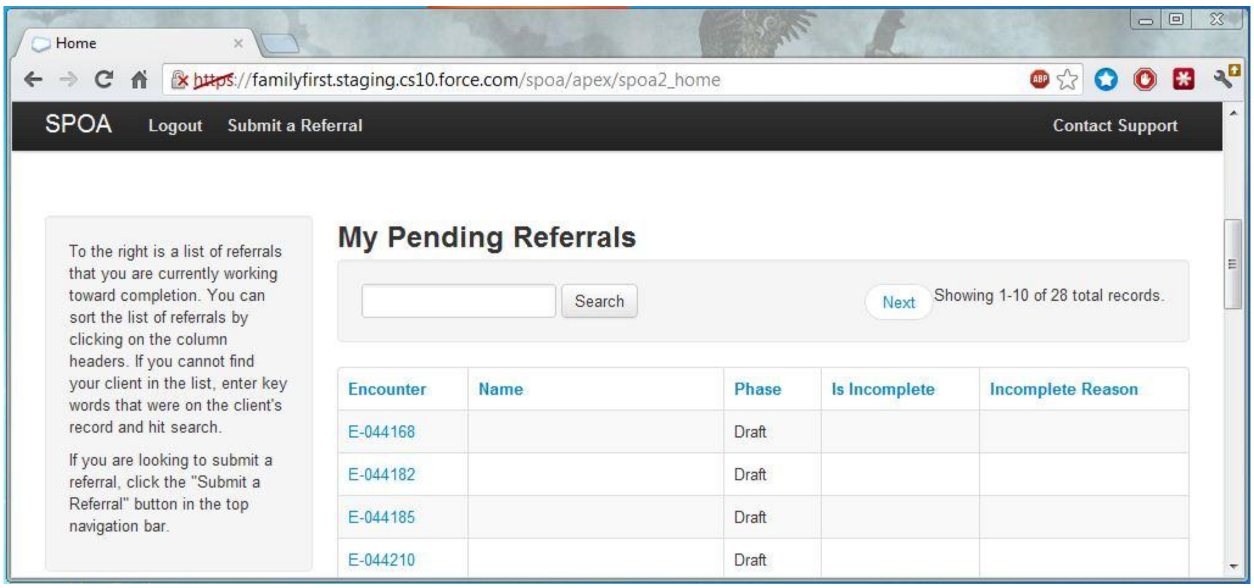
The next step is [(Making a Referral)] <- (please click link)

Section 6.0: Quick Start as an Authenticated Referrer

(Main Menu)

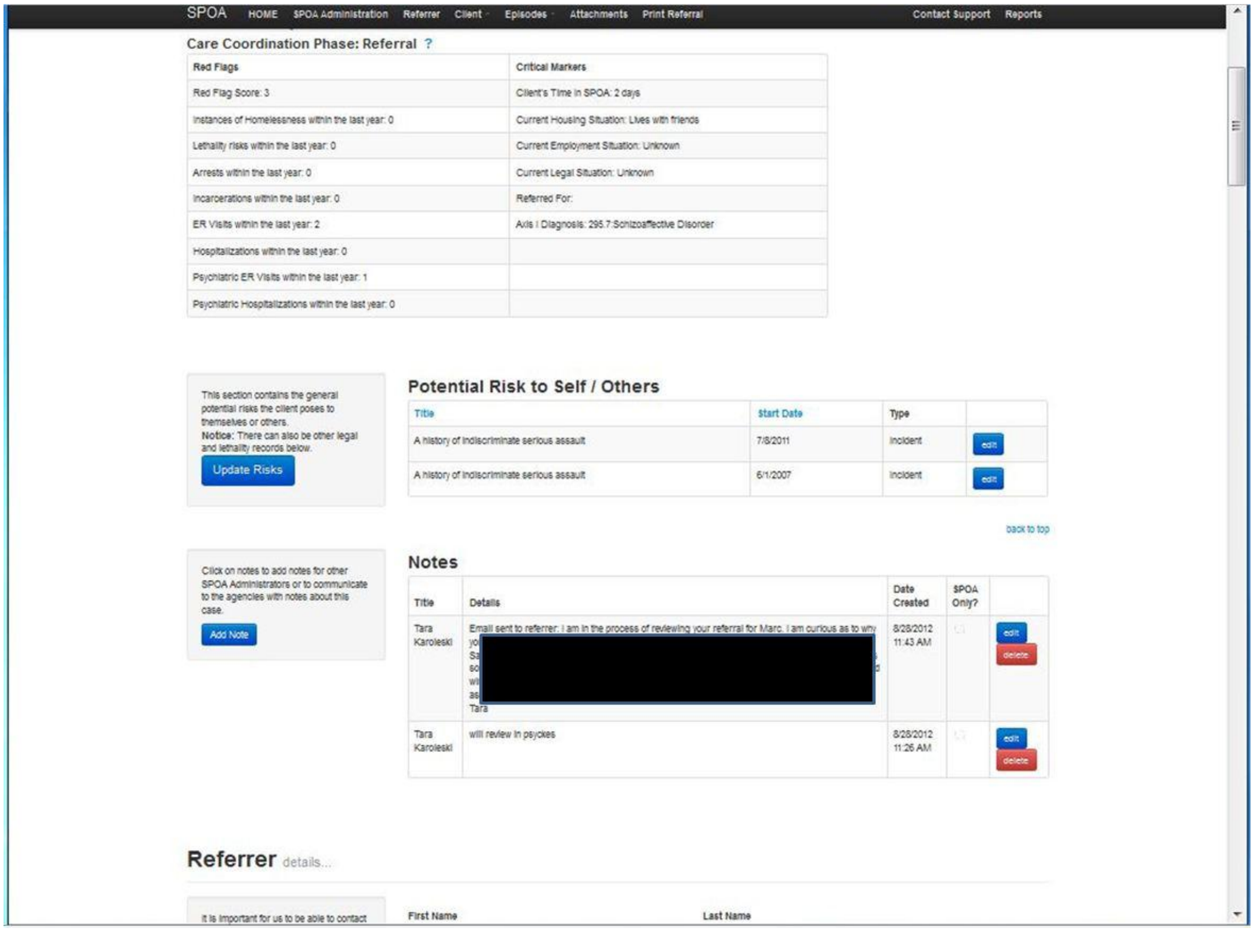
Note: The following is a Quick Start Guide to the Authenticated Referrer.

After they log in, an Authenticated referrer starts out at the page in **(Figure 2)**, which is where you will see any referrals that you have saved and not yet submitted. **The key difference between an Authenticated and a Public referrer is the ability to save partial referrals, and observe the live status of previously submitted referrals.**



(Figure 2)

When you go to open a client on this page, like a pending, or incomplete referral, you will come to the client page seen in **(Figure 3)**, on the next page; from where you will see your completion progress, and own information in the Referrer section and be able to fill the rest out.


SPOA
HOME
SPOA Administration
Referrer
Client
Episodes
Attachments
Print Referral
Contact Support
Reports
Care Coordination Phase: Referral ?
Red Flags
Critical Markers
Red Flag Score: 3
Client's Time in SPOA: 2 days
Instances of Homelessness within the last year: 0
Current Housing Situation: Lives with friends
Lethality risks within the last year: 0
Current Employment Situation: Unknown
Arrests within the last year: 0
Current Legal Situation: Unknown
Incarcerations within the last year: 0
Referred For:
ER Visits within the last year: 2
Axis I Diagnosis: 295.7:Schizoaffective Disorder
Hospitalizations within the last year: 0
Psychiatric ER Visits within the last year: 1
Psychiatric Hospitalizations within the last year: 0
This section contains the general potential risks the client poses to themselves or others.
Notice: There can also be other legal and lethality records below.
Update Risks
Potential Risk to Self / Others
Title
Start Date
Type
A history of indiscriminate serious assault
7/8/2011
Incident
edit
A history of indiscriminate serious assault
6/1/2007
Incident
edit
back to top
Click on notes to add notes for other SPOA Administrators or to communicate to the agencies with notes about this case.
Add Note
Notes
Title
Details
Date Created
SPOA Only?
Tara Karoleski
Email sent to referrer: I am in the process of reviewing your referral for Marc. I am curious as to why
[redacted]
Tara
8/28/2012 11:43 AM
edit
delete
Tara Karoleski
will review in psyckes
8/28/2012 11:26 AM
edit
delete
Referrer details...
It is important for us to be able to contact
First Name
Last Name

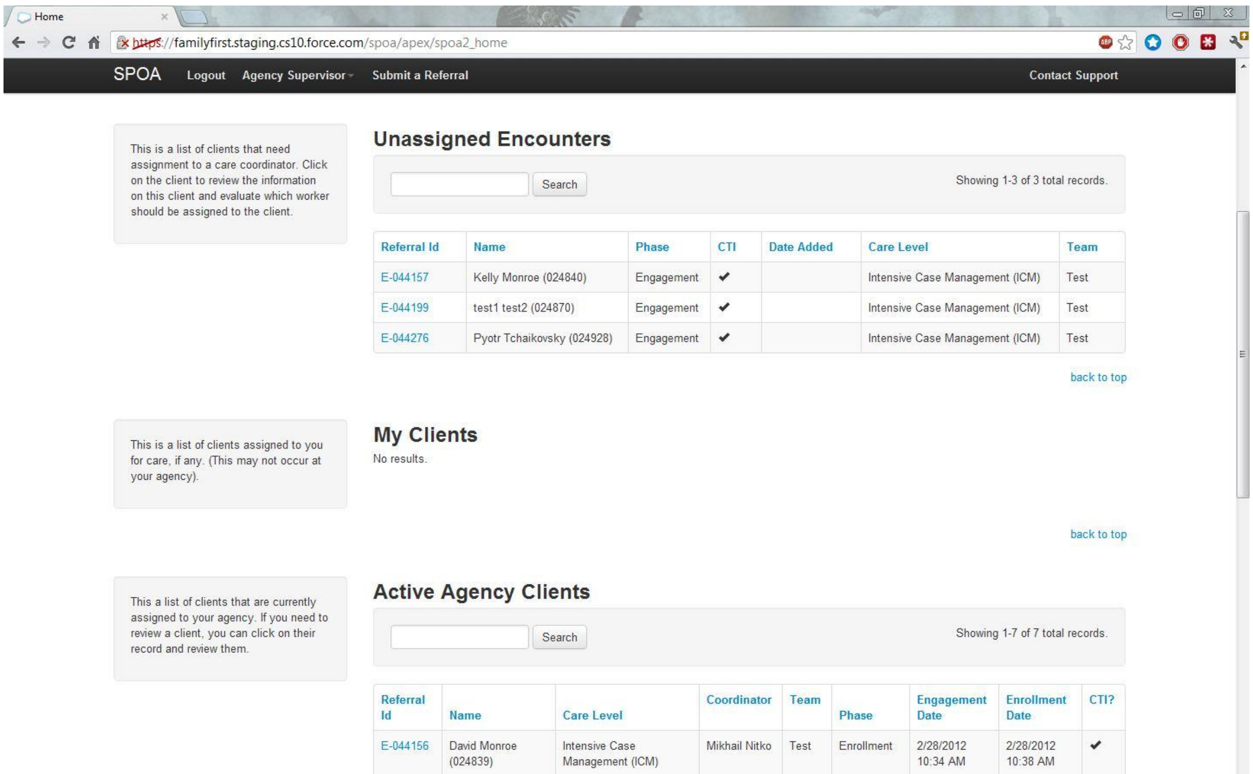
(Figure 3)

Section 7.0: Quick Start as an Agency Supervisor

[(Main Menu)]

Note: The following is a Quick Start Guide to the Agency Supervisor.

After they log in, an Agency Supervisor starts out at the page in **(Figure 4)**, which is where you will see several items that are explained under the.



(Figure 4)

The items seen above, top to bottom, are the as follows:

A) View your **Unassigned Encounters;** these are cases SPOA has assigned to your agency that now need to be assigned to a coordinator or supervisor in your agency.

B) In the **My Clients** section you can view and update any Engagement /Enrollment efforts associated with individuals assigned under your name.

C) In the **Active Agency Clients** section you will see ALL individuals who are accepted and currently being managed by your organization.

D) In the **Requested Disengagements** section, if you have one, you will see any individual from your agency that had a request to Disengage from the

Engagement phase. This request is automatically received by SPOA. SPOA will determine if the disengagement is approved, or the client should be engaged by another agency or level of service. If SPOA determines that the engagement efforts should continue with your agency, the individuals name will show up on your **Unassigned Encounters** list.

E) In the **My Pending Referrals section**, if this is part of the tasks you perform, you will see the referrals you submitted which are currently pending SPOA approval.

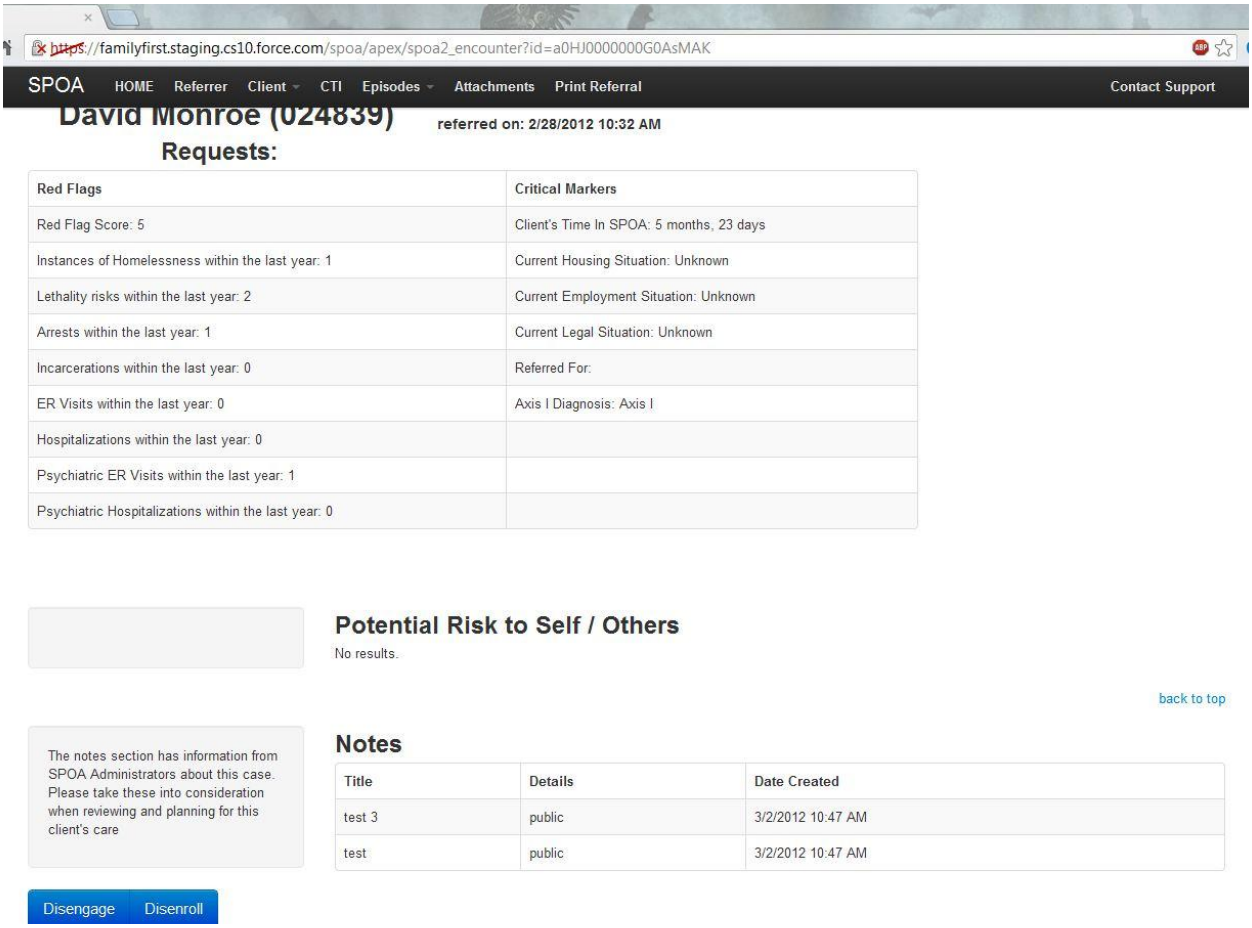
From here, you may click on through into clients and see the page seen in **(Figure 5)**, where you may view and review them.

(Figure 5)

(Section Continued on Next Page)

By clicking on any client in the Active Agency Clients section, depicted in **(Figure 4)**, you will be allowed to *view a client's Risk score*, *begin disengagement*, *begin disenrollment*, or *edit any information* on your agency's client. You will also be allowed to edit the CTI Plan, which is thoroughly covered in the (Critical Time Intervention (CTI)) section of the Guide & Manual.

The screen demonstrated in the below graphic:



Section 8.0: Critical Time Intervention (CTI)

[(Main Menu)]

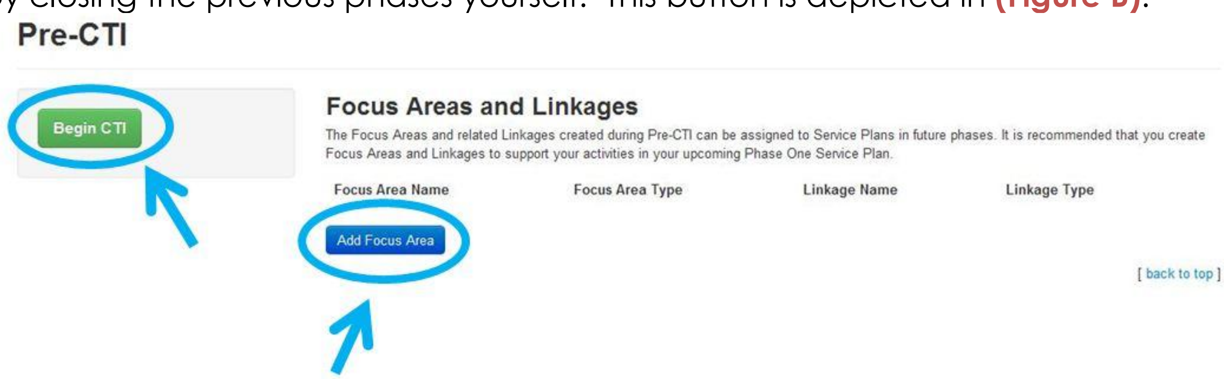
Firstly, whether a client is eligible for CTI and whether they are simultaneously eligible for Pre-CTI, is determined by the SPOA Administration after receiving your referral.

The CTI functionality, that is, to either **Begin** or **Edit** a CTI plan for a client begins from inside of a client's current episode. Below are the shown 2 variations, one, **(Figure A)** where you may add a **Focus Area** and/or **Begin** CTI without it, and the other, **(Figure B),** where you may begin to **Edit** the CTI plan.

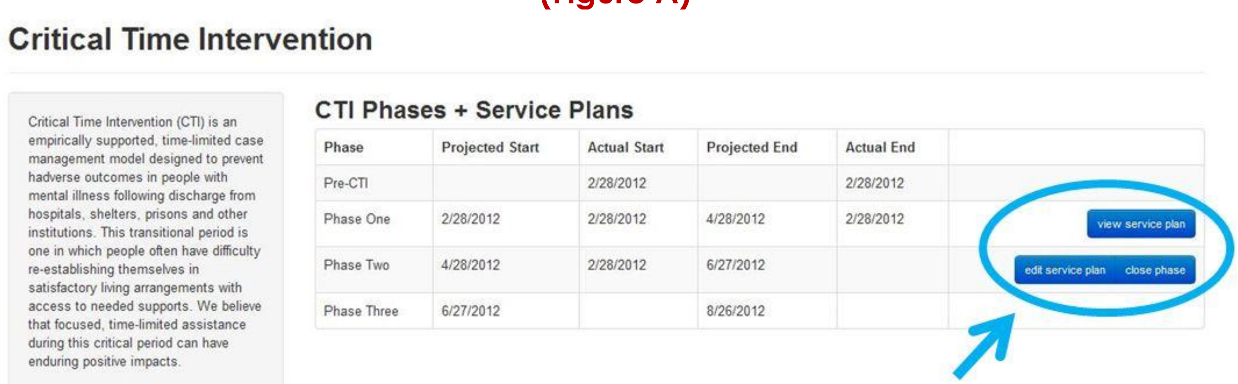
- Please **note** that the Phase dates you see when you Begin a CTI are automatically generated along the structure of the CTI model, and are based on the date you select to start, or change to reflect as the start of your CTI program. The "actual Phase Start Date" functionality, where you may change the date, is depicted in **(Figure F)** below.

- Please **note** that it is important to fill out a Focus Area before you begin CTI- as it will dictate the **very reason the CTI exists** and show you how the process is supposed to flow, in the Phase explanations on the left hand side of the page. It is depicted below in **(Figure C)**.

- Please **note** that you will need to move your client from CTI Phase to CTI phase by closing the previous phases yourself. This button is depicted in **(Figure B)**.

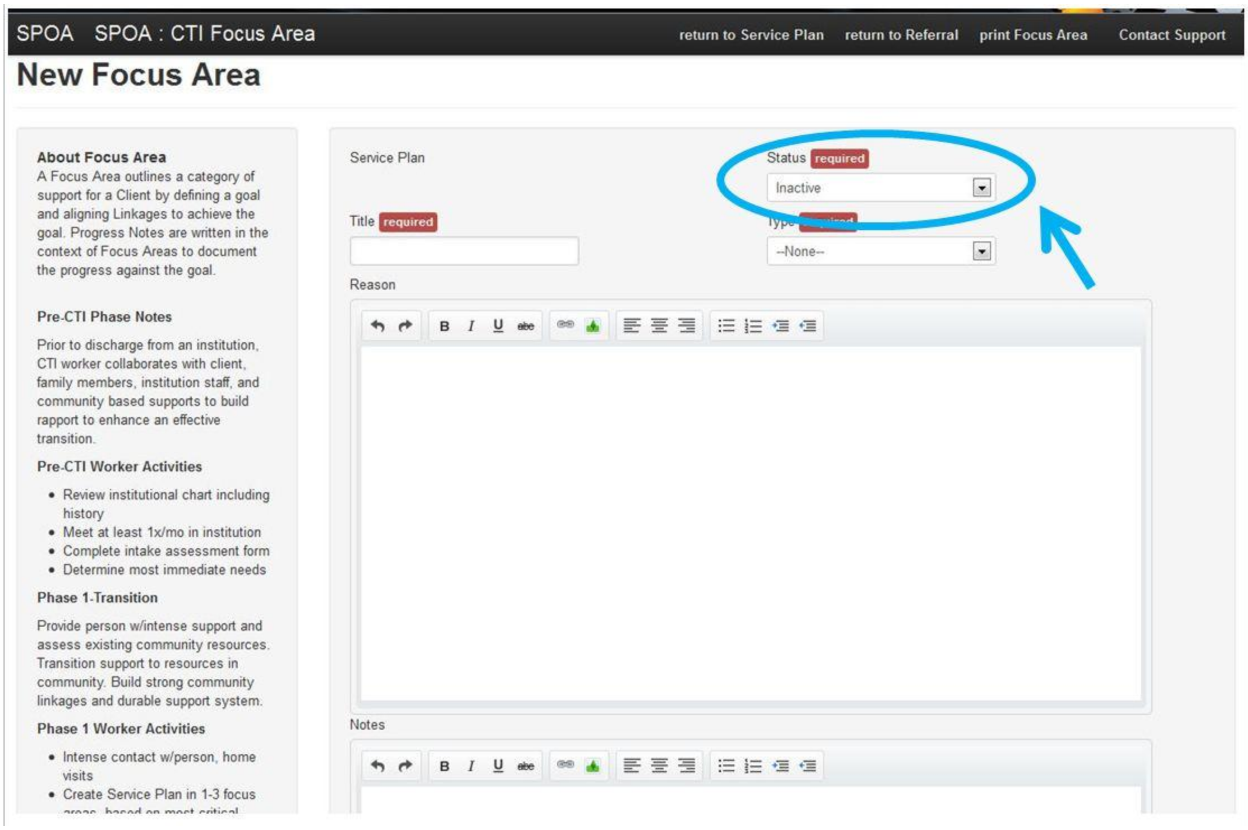


(Figure A)



(Figure B)

(Section Continued)



(Figure C)

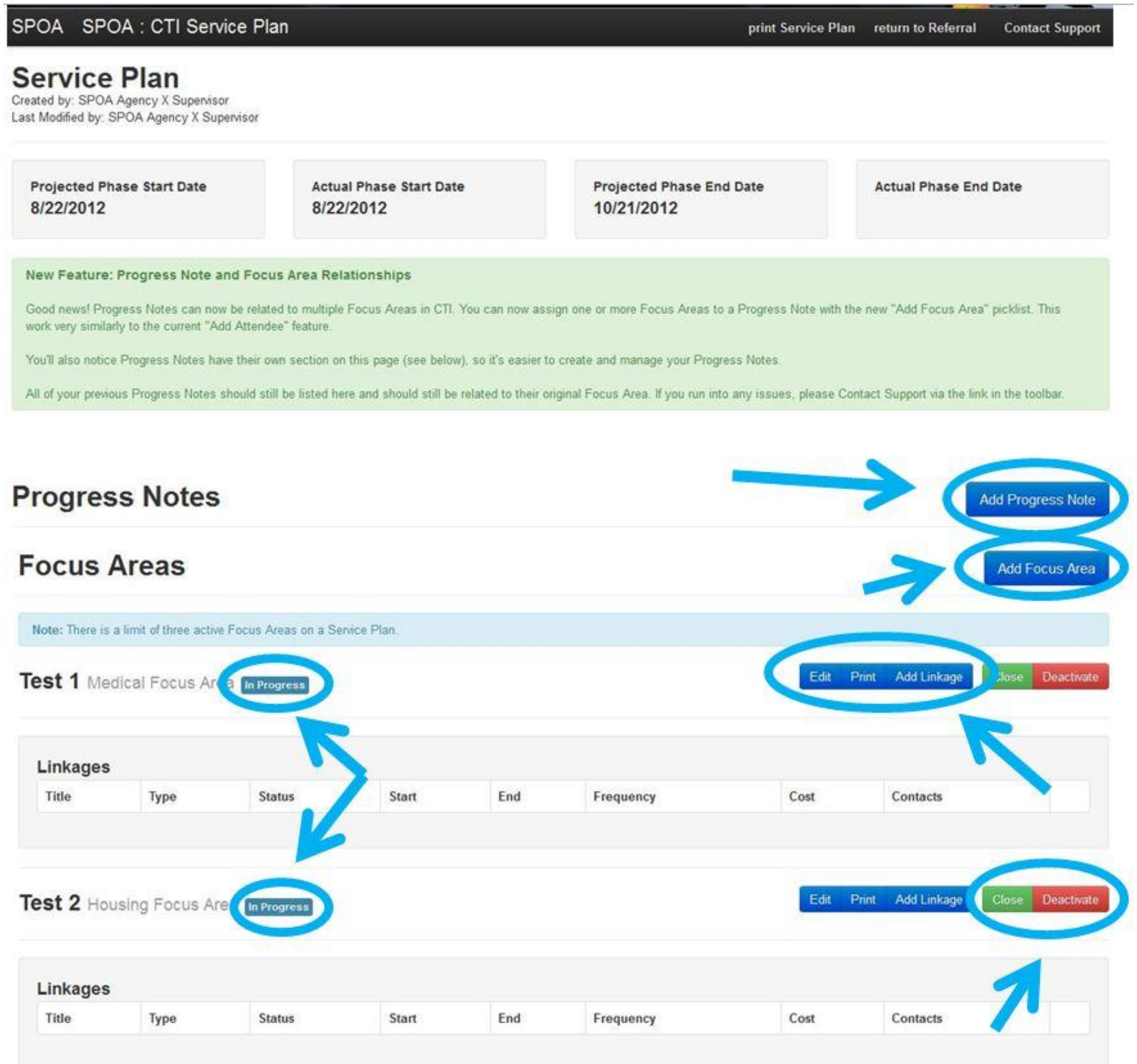
Please **note**, if you have any questions about a client's CTI eligibility determination, please contact Tara. The contact information is in the Contacts section of this document.

As you traverse the Service Plan after selecting to _Edit_ it, you will have the options to _Add Focus Areas_, _add linkages_, _add progress notes_ and thusly remove any of the three. The highlighting of these functionality pieces may be seen in **(Figure D)** below.

Please **note** that you are able to add as many progress notes as you desire, during any portion of CTI.

Per your training you are informed that a client must have at most 3 separate areas of focus during their CTI- however, you are also free to _change_, _deactivate_, or _close_ any focus area you chose at any point. Some of these functions may be done from inside of a focus area, as highlighted in **(Figure C)** or executed while viewing the CTI plan overview as seen in **(Figure D)** below.

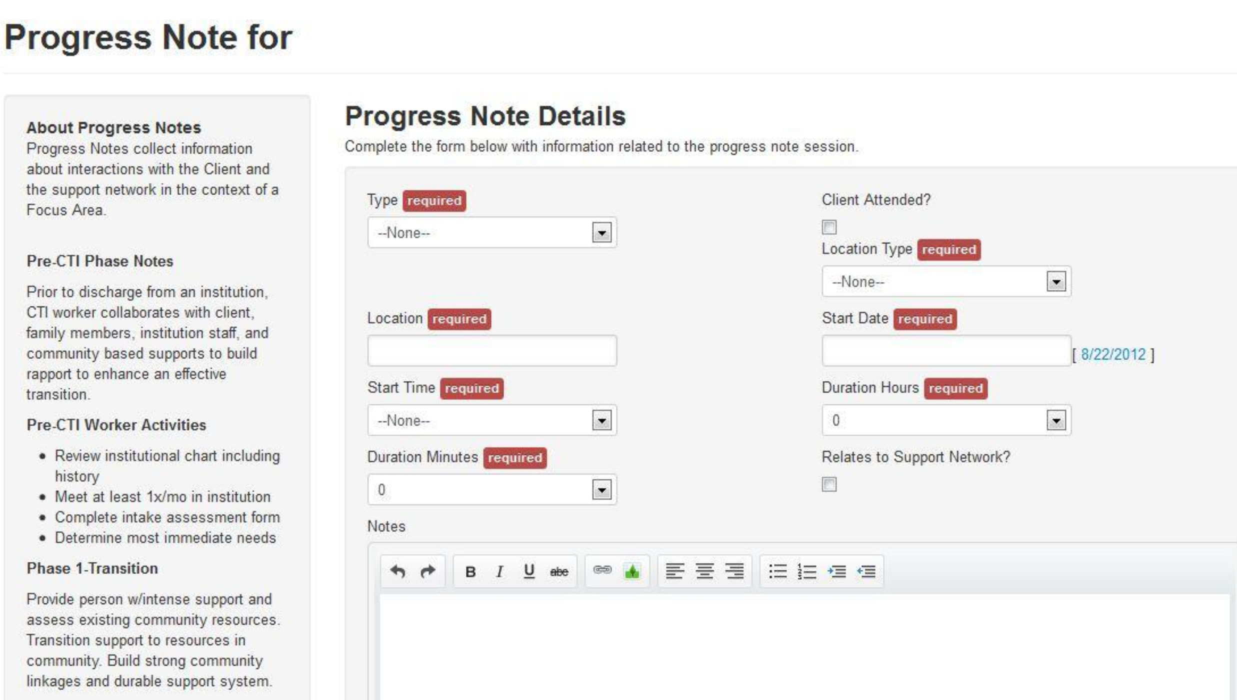
(Section Continued)



(Figure D)

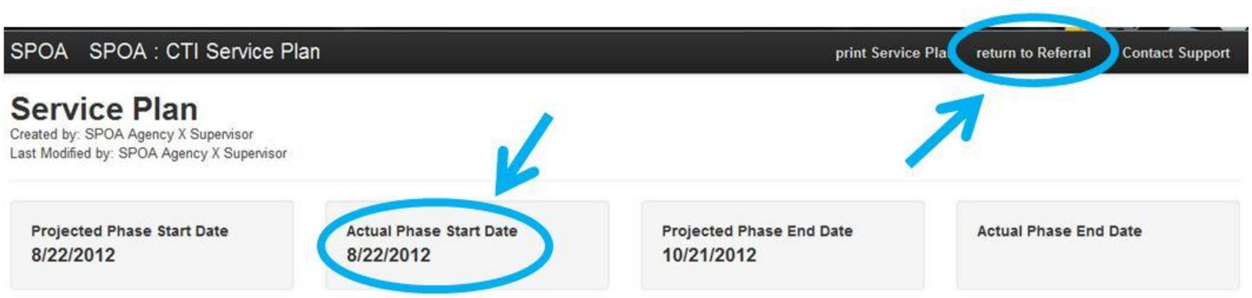
★ Please **note** that SPOA progress note functionality is quite advanced and you should take full advantage of it. An example of the screen is below, and you should take some time to explore the menu system in this layout, as you may find it allows you to record more detail with more accuracy than systems you may have previously experienced. It is exemplified in the below **(Figure E)**.

(Section Continued)



(Figure E)

Please **note** that to get back to your referral after filling out progress notes or focus areas, use the "return to Referral" link depicted in **(Figure F)** below.



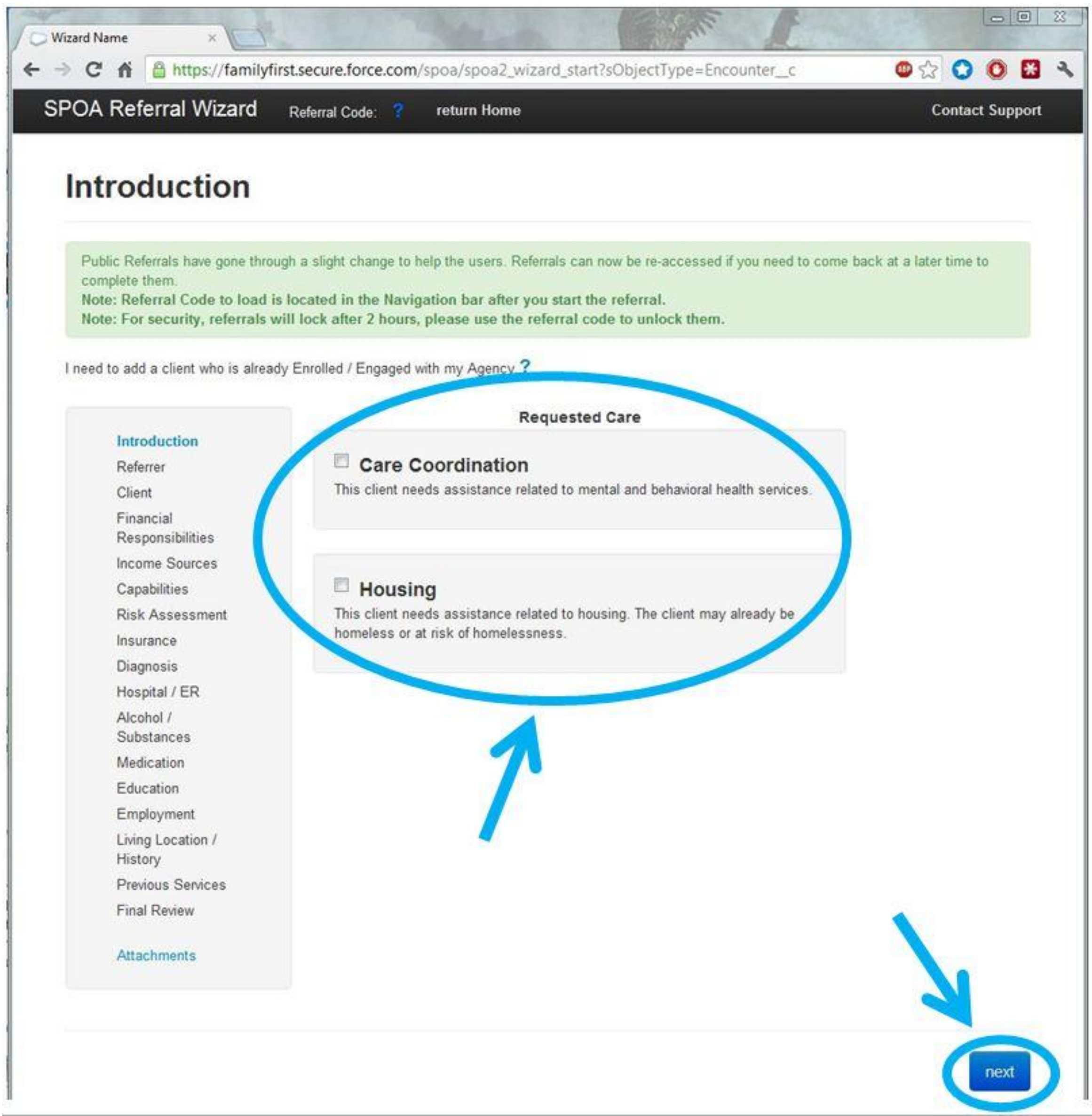
(Figure F)

Section 9.0: Making a Referral

[(Main Menu)]

After clicking the **Submit a Referral** link on either your private or public SPOA referral page, you will be put through to the SPOA Referral Wizard.

Here, the first choice you will make is whether you want to refer the individual for *Care Coordination* or *Housing*, then select the options for *Care Level*, *Care Status*, and/or the client's current state of housing after you chose a referral type- and then click **Next.** The referral type options and explanations for both choices, or new choices, are shown as follows:



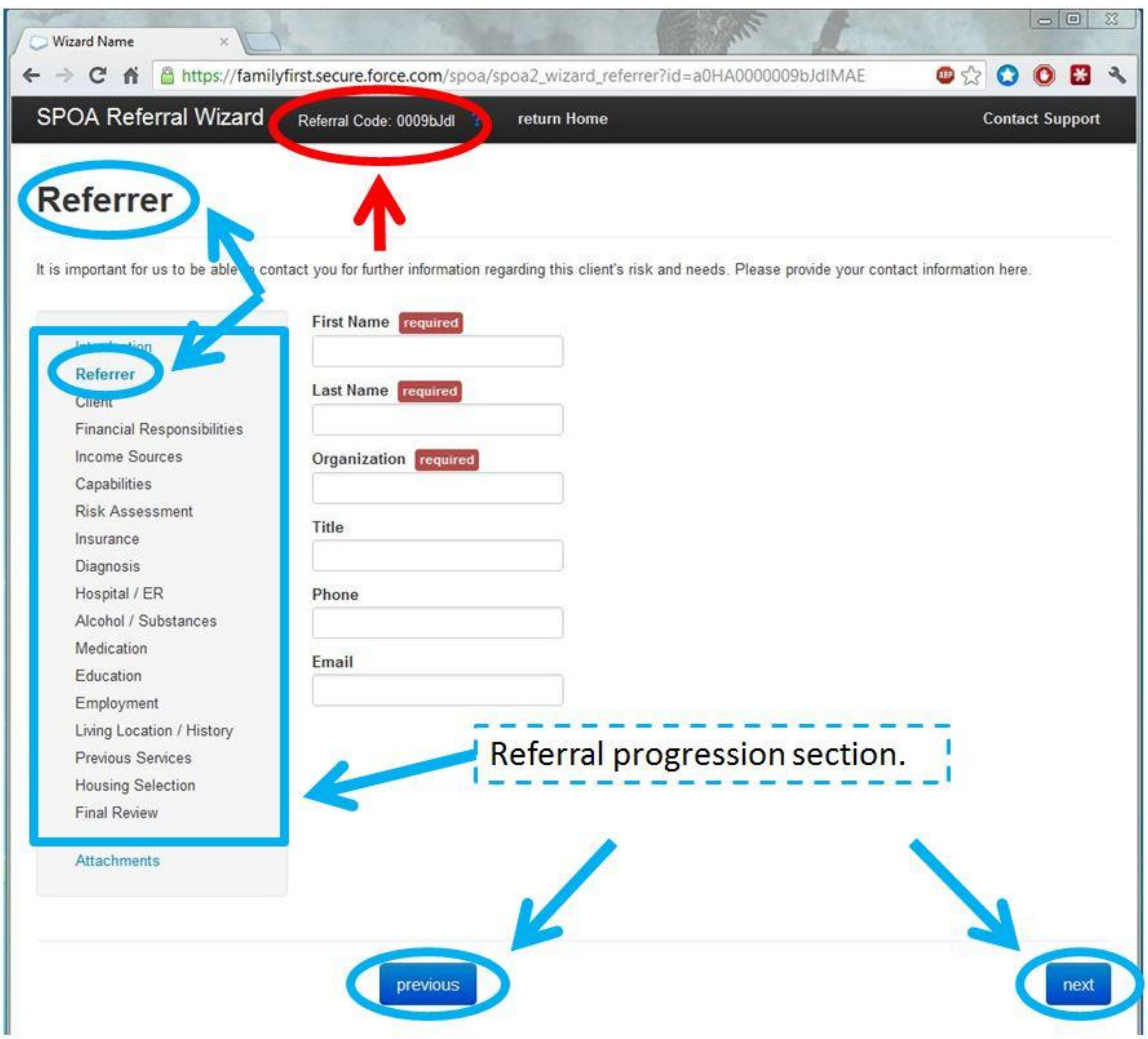
The next progressive section is the **Referrer** information section and you will see it highlighted on both, the top of your page and in your overall referral progress section. Here you will fill out information about yourself as a referrer.

Please **note** that the *Organization* input box will be auto-filled with your organization if you are not a public referrer.

Please **note** that you now have both a **Previous** and **Next** button, and they can be used to navigate between sections of the referral.

Please **note** that **if you are a public referrer**, you are given 2 hours to complete a referral, and if you time out or otherwise leave the page, you will need to have the **Referral Code** highlighted below in red to retrieve your referral. The link to do so will be present next to the **Submit a Referral** link on the public referral page.

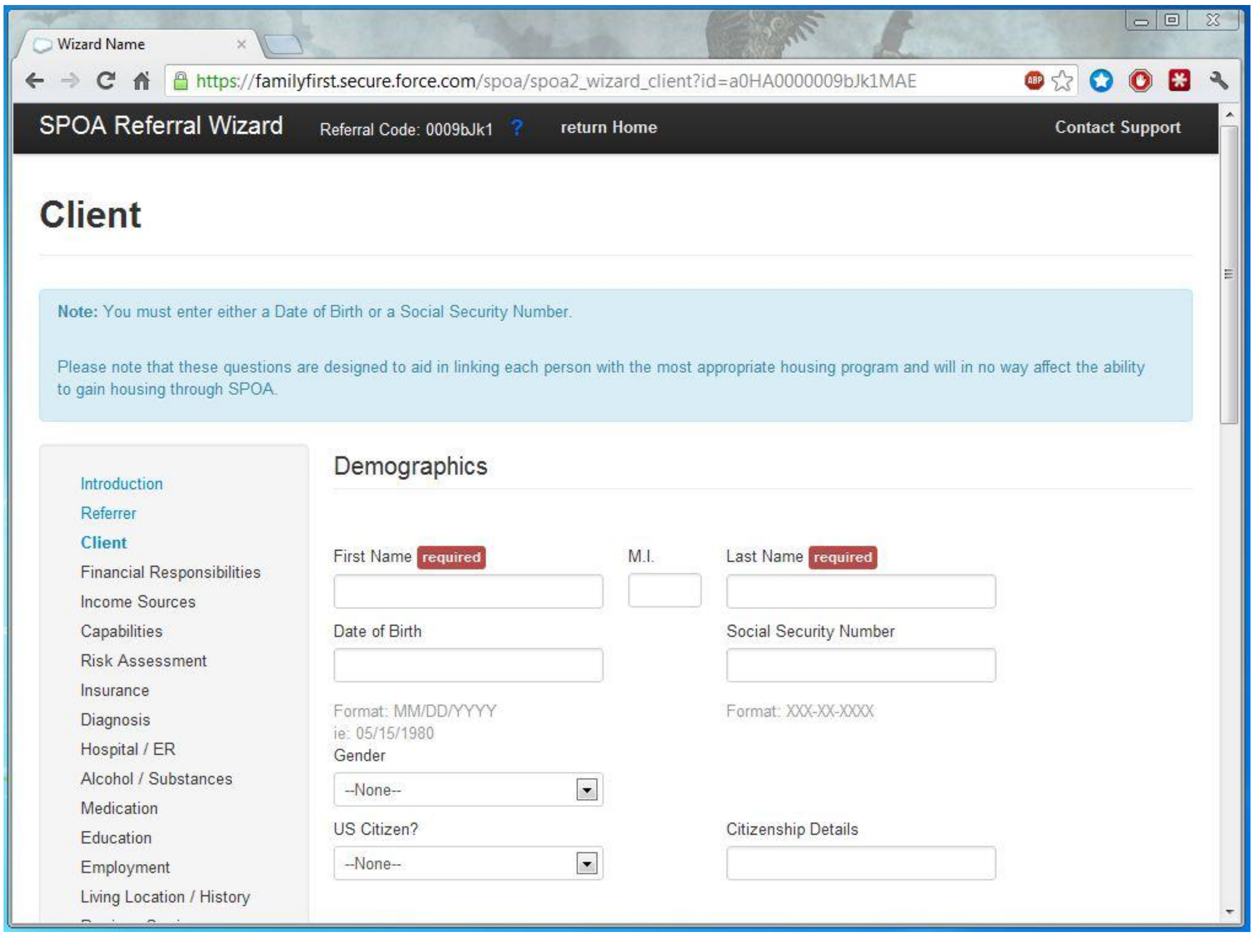
The overall section will look like the following:



The next progressive section is the **<u>Client</u>** information section. Here you will fill out the *<u>demographic</u>*, *<u>contact</u>*, *<u>race</u>*, *<u>language</u>*, *<u>child</u>*, and *<u>marital status</u>* questions about your client.

Please **note** that you will also have a *<u>housing information</u>* section on this form at the bottom if you have chosen to make a referral for Housing or for both Care Coordination and Housing simultaneously.

The overall section will look like the following:

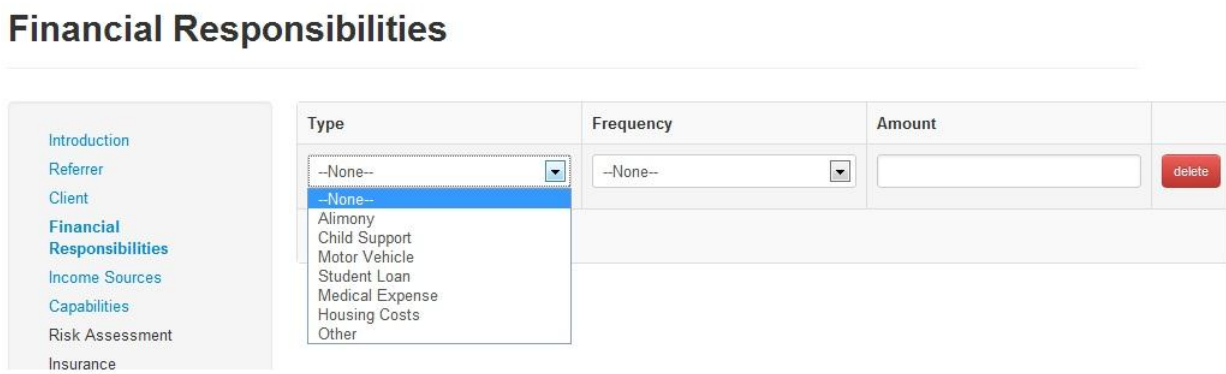


(Continue)

The next progressive section is for **__Financial Responsibilities__** information. Here you will select whether the client has financial responsibilities, and then what kinds if you select that they do; such as *__Housing__* or *__Student Loans__*.

Please **note** that you will be able to add as many financial responsibilities as desired- but the option to add more only appears after you record the first.

If you select that the client does have responsibilities, the next step looks like the following:



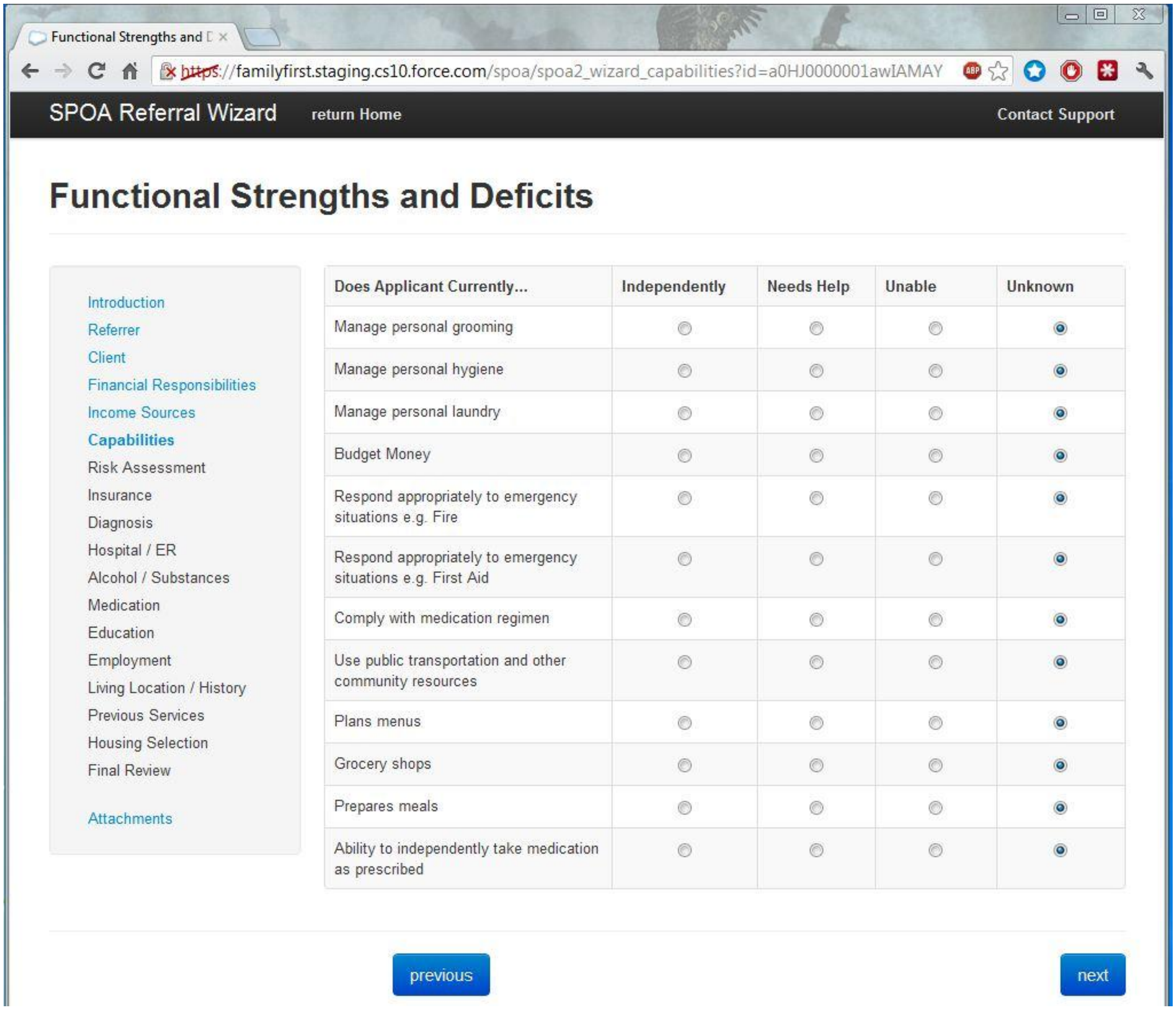
The next progressive section is for **__Income Sources__** information. Here you will select whether the client has income sources, and then what kinds if you select that they do; such as *__Alimony__* or *__Bank Accounts__*.

The section looks just like the previous Financial Responsibilities section did.

The next progressive section is for **__Capabilities__** information, where you enter your client's functional strengths and deficits. With which you will rank the level of independence or lack thereof of your client with regards to things like managing personal *__hygiene__*, *__grocery shopping__*, or *__ability to independently take medication as prescribe, etc.__*

The overall section is depicted on the next page:

(Continue)



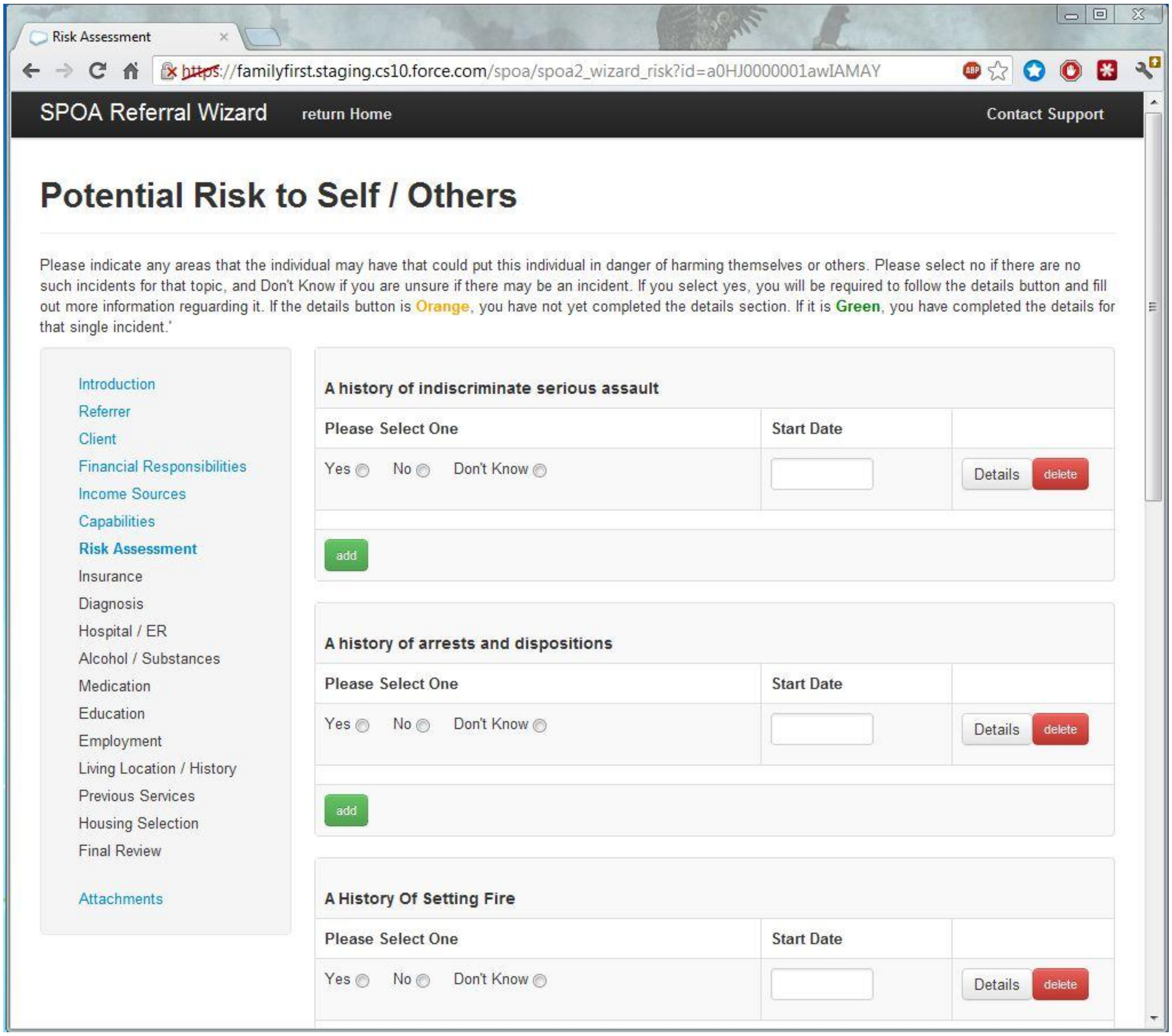
The next progressive section is for **<u>Risk Assessment</u>** information with application to both Self and/or Others. Here you will enter information such as that of any history of *<u>assault</u>*, *<u>setting fires</u>*, *<u>suicide attempts</u>* or other self-harm.

- Please note that you will have to fill out this entire form, and specifically indicate that a client has had no known episodes of the series of types listed- by clicking on either the *<u>No</u>*, or *<u>Don't Know</u>* option.

- Please **note** that for the sake of monitoring for emergencies or trends, during referral each client is assigned a risk score as they move through the system. Much of this risk score comes from the history attributions you record in this section. Dependent on the level of the score, in relevance to others being evaluated, it may change a client's standing with respect to necessity for quicker placement. The broader the history of relevant events you give, the greater the chance of expediency.

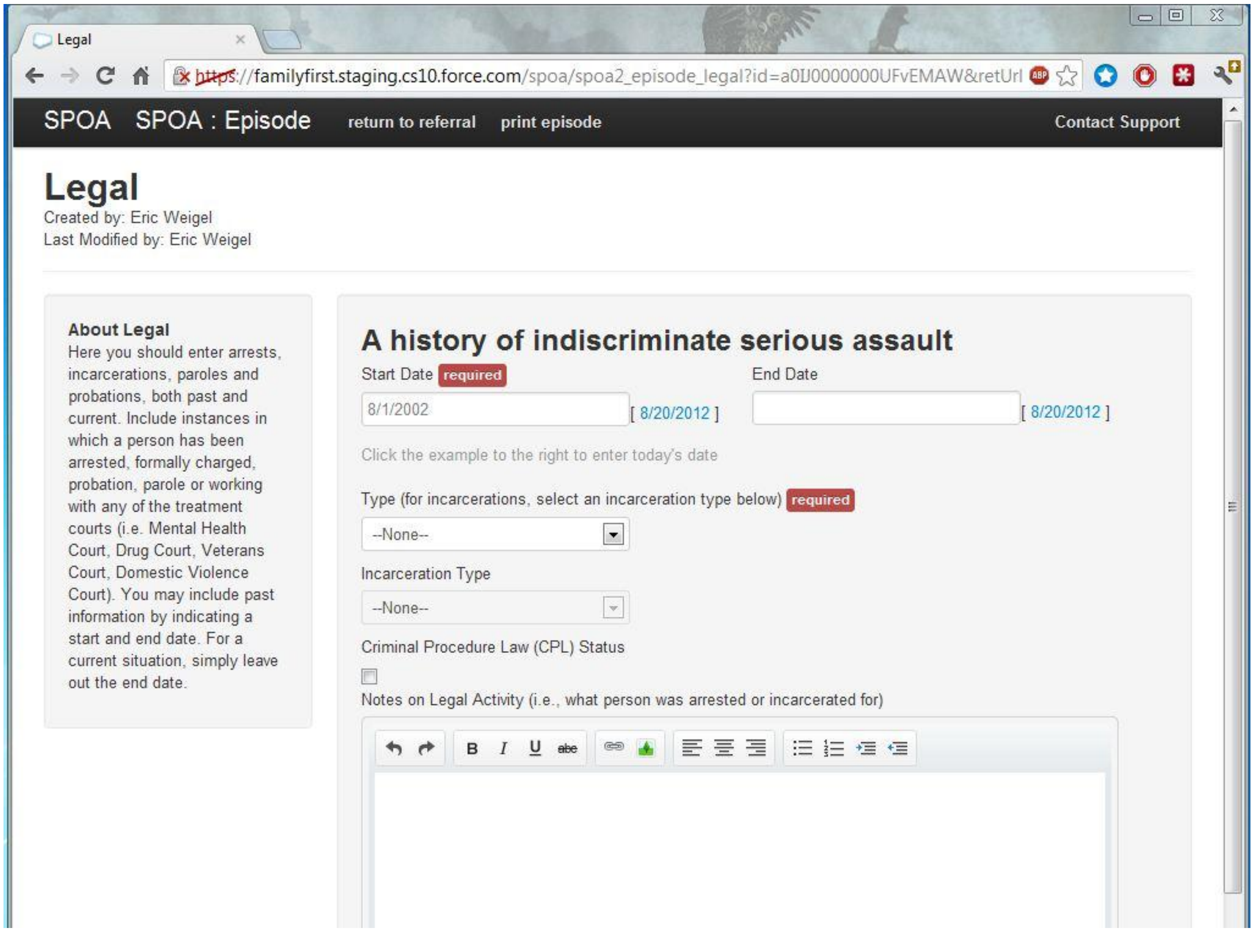
- Please **note** that you will be given the opportunity to enter the details of the history after selecting that it applies to the client. The section where you will fill this in will be in the Details section that highlights as orange, after selecting the applicable "Yes" to the applicable history piece.

The overall section will look like the following:

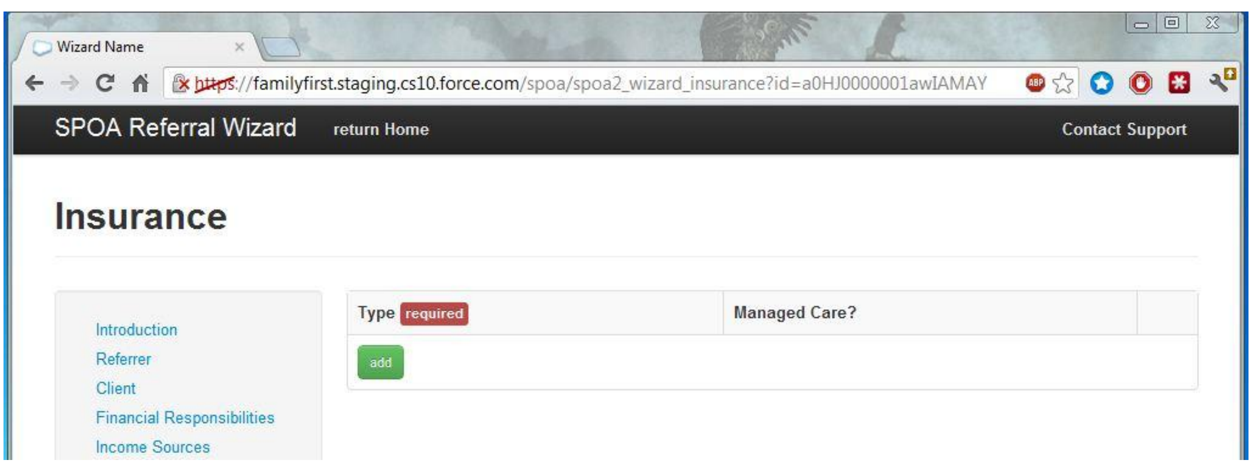


Adding details to such an event is depicted on the next page:

(Continue)



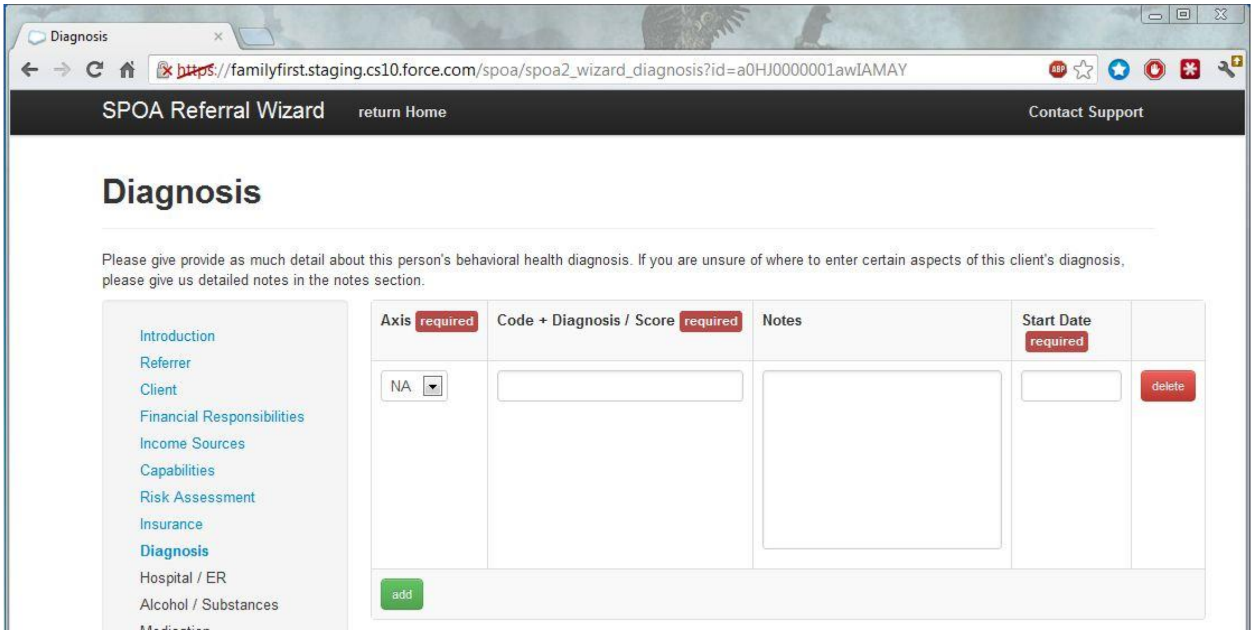
The next progressive section is for **Insurance** information, and it is pretty straight forward and brief. For demonstration purposes it looks like the following:



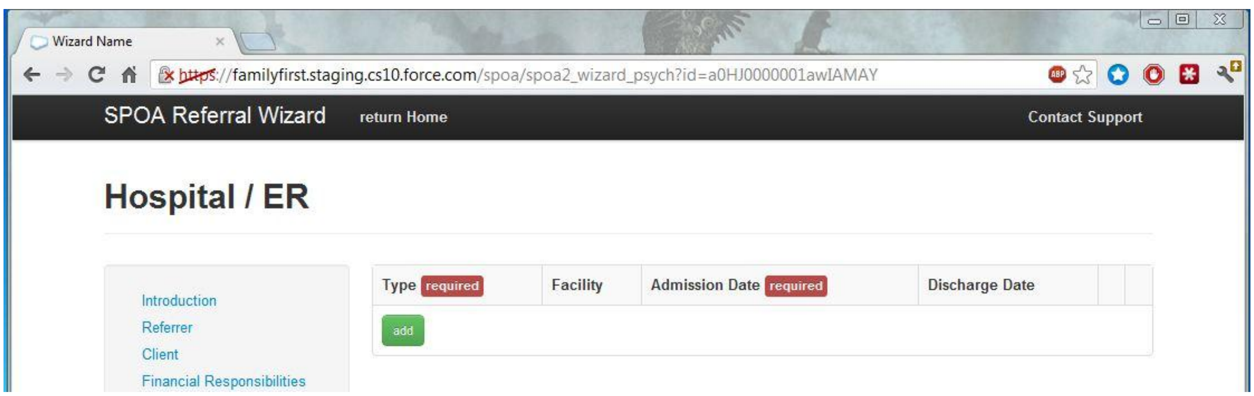
The next progressive section is for **Diagnosis** information. This applies to the individual's official behavioral health diagnoses.

Please **note** that at least one diagnosis must be entered.

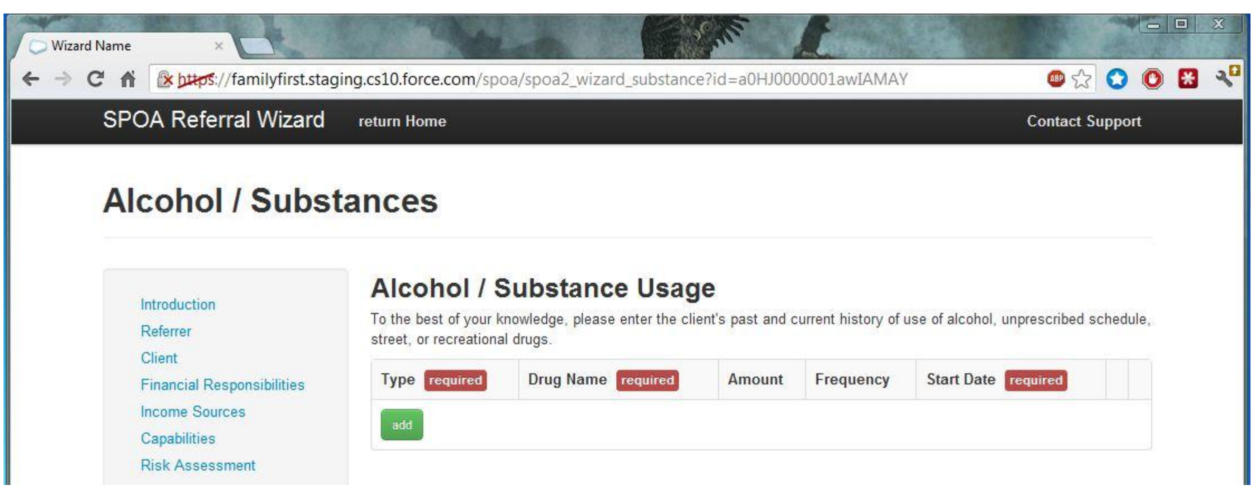
This section is depicted on the next page:



The next progressive section is for **Hospital / ER** information. This information is entered episodically, like many other sections, and looks like the following:

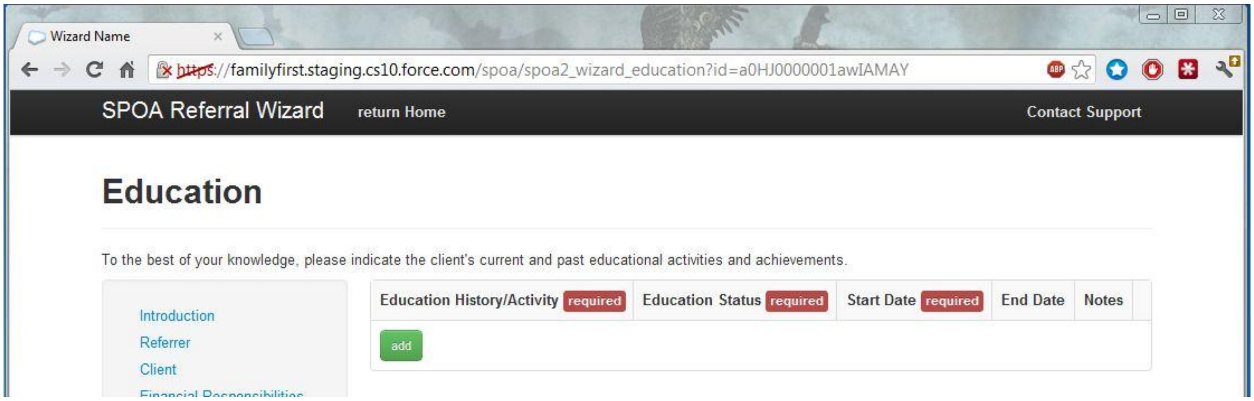


The next progressive section is for **Alcohol and Substance** information. If you select _Yes_, the section looks like the following:



The next progressive section is for **Medication** information section. If you select *Yes*, the section looks the same as the above section for Alcohol & Sustances.

The next progressive section is for **Education** information. This section is historic, with episodes you can enter for long into the past, or today. If you select *Yes*, the section looks like the following:



The next progressive section is for **Employment** information. This section is historic, with episodes you can enter for long into the past, or today. If you select *Yes*, the section very much like the above Education section.

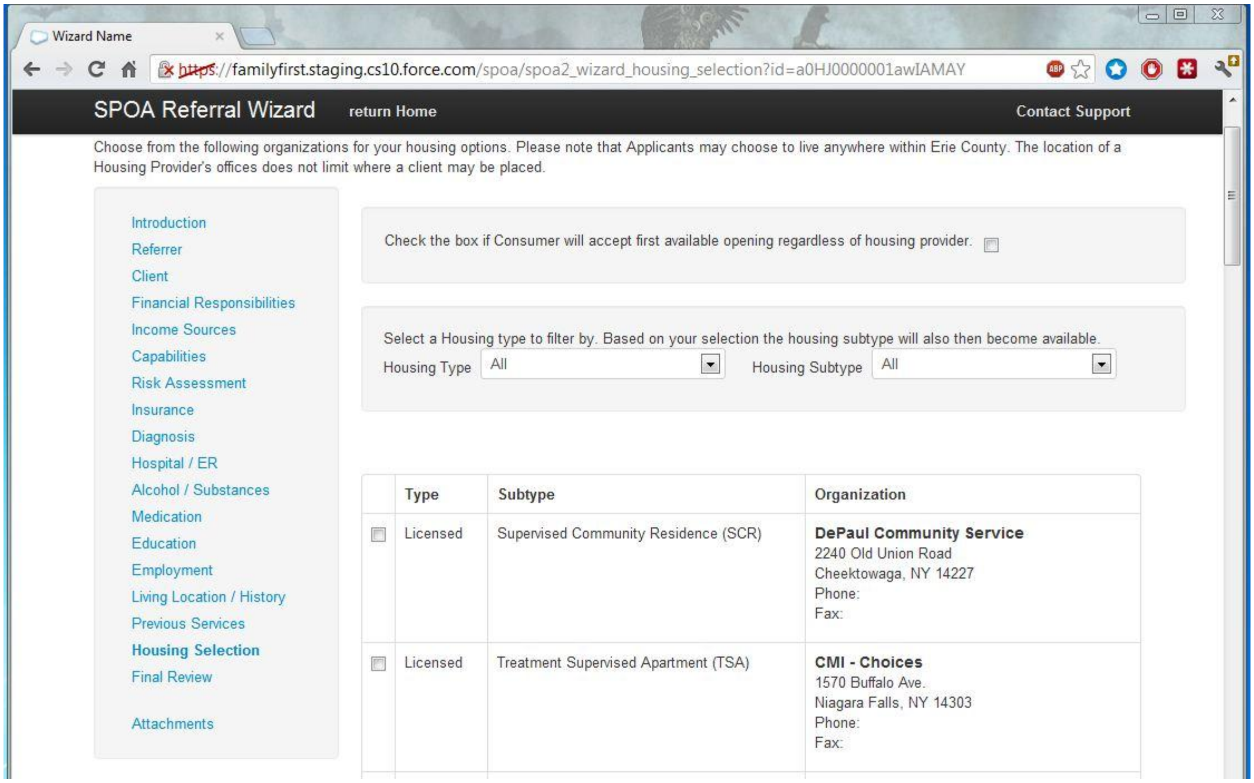
The next progressive section is for **Living Location & History** information. This section is historic, with episodes you can enter for long into the past, or today. This section looks and functions very much like the above Education section.

Please **note** that for special situations such as homelessness, you could place more information in the Details sections next to each living location you enter- such as the individual's typical places, like cross streets.

The next progressive section is for **Previous Services** information. This section is historic, with episodes you can enter for long into the past, or today. If you select *Yes* to either option, this section looks and functions very much like the above Education section.

The next progressive section is for **Housing Selection**. This section is for choosing which appropriate housing you would like to submit your housing referral for, if you chose that as an option for the type of referral in the beginning.

This section is depicted on the next page:

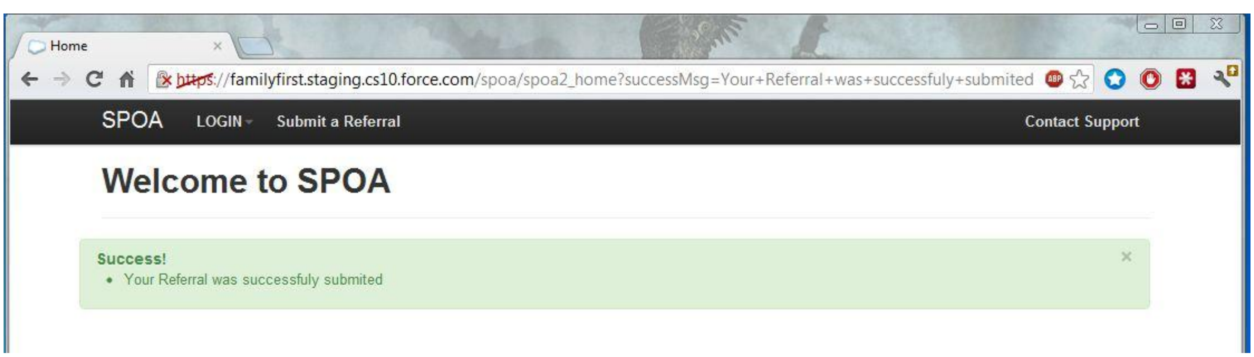


The next progressive section is for **Final Review**. This section is from where you will be able to see all the information you've entered in the above sections one-by-one- and from where you will be able to review and edit any choices before choosing to submit, via the Submit button at the bottom right of the page. If you have not completed all the required information, this button will be **Red**; otherwise it will be **Green**.

Please **note** that any necessary consent forms must be attached to the referral via the Attachments link, located below the Final Review progression step, in your progression list to the left on your screen.

Please **note** that certain sections with incomplete information will be highlighted here and you will be required to choose whether the information being asked for is applicable or not.

A successful submittal will end on a screen such as this one:



Section 10.0: Contacts

(Main Menu)

- For the Erie County SPOA office, please contact Tara Karoleski, at: mailto:Tara.Karoleski@erie.gov