JAIL COLLABORATIVE PROVIDER USER GUIDE



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Introduction

What is Jail Collaborative?

Jail Collaborative is the repository of record for complete, real-time service information for all Jail Collaborative clients. It will also capture information services rendered, goals and their outcomes for these clients.

How will I use the Application? - Overview

There are 2 groups that will be using the Jail Collaborative Application; internal users (Jail, Re-entry, Probation, Courts) and providers. Internal users are responsible for clients in the Jail Collaborative system and will request services to be provided for the Jail Collaborative clients. As a provider, you will receive these **requests to provide services** to Jail Collaborative clients and you will choose whether or not to provide these services. If you choose to provide services to these clients, you will have access to this client in the Jail Collaborative system.

Once a client is receiving services from your organizations, you will be expected to **complete Supplemental Intake Forms** to document additional information about this client. In addition, you are able to **update other client specific information** such as employment and contact information.

The primary role of the provider is to **document outcomes** in the *Goals and Outcomes* screens for the services you are providing to the clients. You can continue to update these screens at any time while you are providing services to a client.

While working with a client, you may feel that this client would benefit from another service. You will be able to **refer clients for additional services.** This request will be sent to the Internal User responsible for the client who will ultimately decide whether or not to accept this request and if he/she does, select the provider.

Once you have completed providing services for a client, you will be expected to **close the service** in the application. At this point, you will lose access to this client in the system.



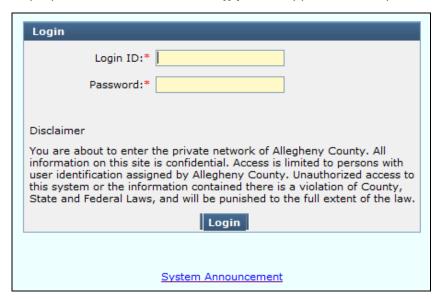
Navigating & Common Screen Elements

Logging into the Application



- Click the KIDS icon on your desktop
- OR navigate to the URL: https://kids.county.allegheny.pa.us/kids
- To access KIDS, log in using your Login ID and Password
 - The System Announcements link will display a schedule of any maintenance windows planned for the application
- Then click the [Login] button

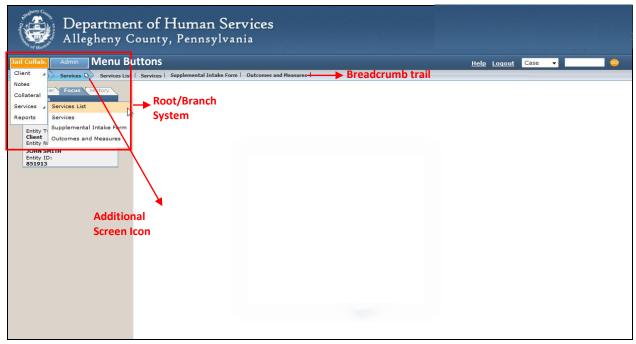
TIP: Pop-up blocker must be turned off for the application to open





Key Elements of the Application

Menu Buttons and Root/Branch System



- The Root/Branch system goes out to the leaf level
- Names in screens in bold text can be navigated to
 - Screen names in light text cannot be viewed. An action must happen before this screen can be viewed
 - Hover on menu buttons to expand menus. Be sure to navigate straight down and straight across
- Click when the desired screen is highlighted in the expanded menu
- Black corner triangle [4] indicates that there are additional screens in the menu
 - o If the menu item does not have the icon, then there is only one screen

Breadcrumb Trail



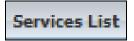
- Another way to navigate in the application
- Displayed when one of the menu buttons is selected
- Displayed once an entity is in focus. This displays one level of the menu
- This toolbar will change depending on where you are in the application
 - Blue shows the root pages
 - Orange shows current location in the application
 - Gray shows additional screens



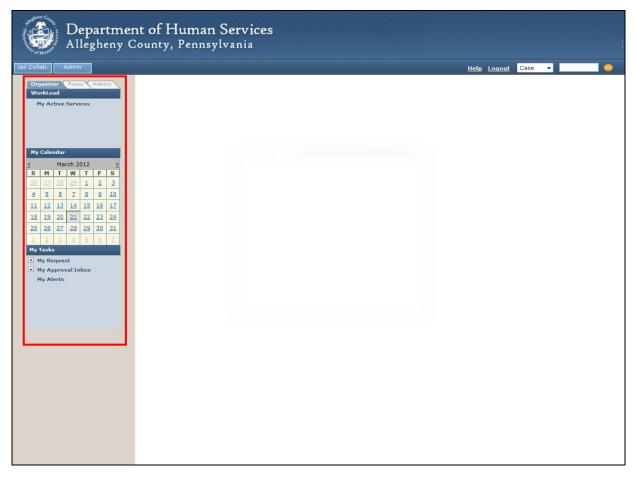
• The Additional Screen icon is a small square icon found on certain breadcrumb toolbar buttons



 If a toolbar button does not have an icon, it means that there is only one screen associated with that button and there are no additional screens at a lower level. The screen clicked will display



Left Navigation Bar



- The left Navigation Bar is used to assist with your day to day activities in the Jail Collaborative Application within KIDS
- This feature is always displayed
- There are 3 tabs that function like folders
 - Organizer tab
 - o Focus tab
 - History tab
- Click on the + sign to expand and collapse lists



Organizer Tab



The Organizer tab is a tool used to display responsibilities for the active user

- Workload:
 - My Active Services- Will show all active cases for Jail Collaborative (and any placement and non-placement services)
- My Calendar:
 - o Used to show when tasks are due
 - Alerts can be auto generated or entered manually
- My Tasks:
 - My Request
 - Awaiting Action items that have been submitted for Supervisor approval
 - Denied items that approval has been denied
 - Recently Approved items that have received supervisor approval in the last 30 days
 - Returned Items that Supervisor has sent back for editing
 - My Approval Inbox
 - Awaiting Action
 - My Alerts

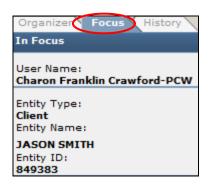
History Tab



 The History tab lists the last 5 screens that were viewed during your current session



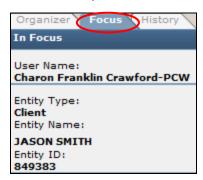
Focus Tab



- The **Focus** tab displays the active Jail Collaborative client
- Only one client can be in Focus at a time

Bringing an Entity into Focus

- Provides the means to update or view client information
- Any screen viewed will be for the Jail Collaborative client that is in Focus
- Always make sure the desired client is in Focus



My Active Services

- On the Organizer Tab in the Workload Section, click on My Active Services
- Once the My Services screen appears, click on the Jail Services tab

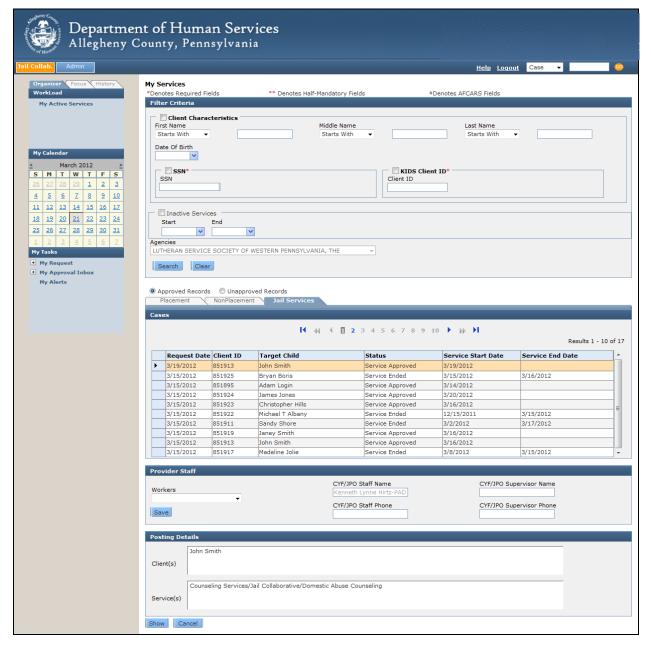


Review the grid and highlight the client and service episode of interest, and click Show. This
will bring that client and service episode into Focus

TIP: If there is more than one service episode for a client, review the information in the 'Posting Details' section to ensure you are selecting the right service episode.



Searching a Client



- Navigate to the My Services screen (Click My Active Services on the organizer tab. To search Jail Collaborative clients, select the Jail Services tab.)
- Select the box next your desired search method (either Client Characteristics, SSN or Client ID).
 Enter information in the required fields and click Search
- Review the Client results and highlight the Client of interest and click Show.



Quick Search

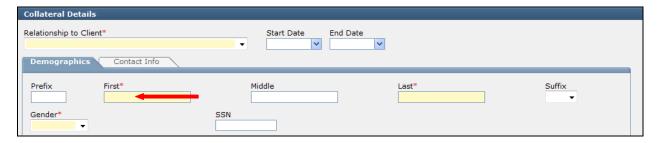


- ullet Select 'Client' from the dropdown. Enter the Jail Collaborative Client ID Number and click ullet
- Your Entity will be in focus



Common Screen Elements

Field



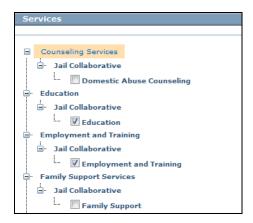
- A field is an area where data can be entered
- Limited in size
- Mandatory fields are yellow and marked with an asterisk

Radio Button



- Radio buttons are found next to certain fields in the application
- Once selected the radio button will turn blue
- Only one Radio button can be selected within a group

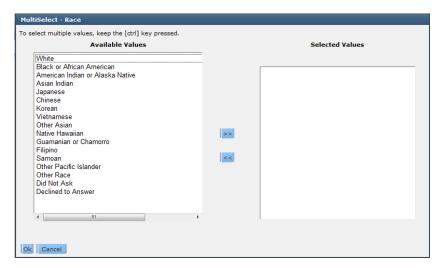
Check Box



- Select and deselect by clicking inside the box
- Multiple boxes can be selected at the same time

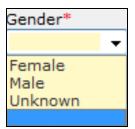


Multi Select Box



- Click the [Select] button located beneath the field to open the corresponding Multi-Select popup
- Contains a list of predefined selections
 - Highlight selection(s) and use middle buttons (>>) to move values from "Available Values" to "Selected Values"
 - To add more than one value at a time, hold the CTRL button on your keyboard while selecting all applicable values
- Click the [Ok] button to close the pop-up and the Selected Values will display in the corresponding field

Drop-Down List



- A drop-down list is a field with predefined selections
- Only one selection can be made from the list
- To display the list, click on the arrow on the right of the field
- Click on the desired selection, that selection will display in the field



Narrative Text Field / Zoom Box



- Click in the field and type narrative text
- Click on the Magnifying Glass icon to the right of the field to open the Zoom Box
- Use the Spell Check feature by clicking on the Spell Check button
- Character Limit is displayed along with the number of characters used

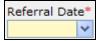
Date Field



- Click on the drop arrow to open the calendar window
- Select the month, year and then day
- The selected date will populate into the field
- The date can also be typed in the field in MM/DD/YYYY format

Required Fields

- Field must be completed before the screen can be saved. These fields are indicated with yellow shading and *
- All fields are expected to be completed if the information is known





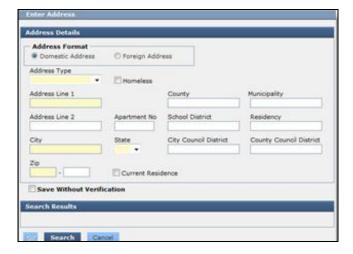
Tabs

- Tabs show that there are multiple screen layers on top of each other
 - These are accessed by clicking on the desired tab to bring that information to the top of the stack
- · The tab that is selected and currently displayed is highlighted in blue



Address Box





- Click Edit
- The 'Enter Address' pop-up is displayed
- Select the Address type and complete the applicable fields. Click Search
- The system will validate the address against a postal database
 - The address will validate and a message indicating this will be displayed
 - An alternate address will be displayed
 Select the proper alternate address
 - The address will not validate and a message indicating this will be displayed
 - To add an unverified address, click the box next to Save Without Verification
- Click **OK**.

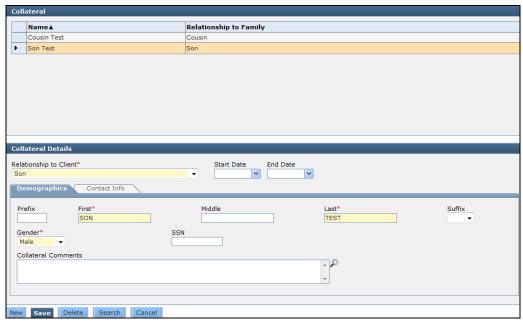
Once an address is selected and you click OK, the address will populate the field





Grid

- Grids are built based on the fields completed on the screen.
- To create a new entry, click New. Enter the information and click Save and it will populate in the grid.
- To update information in an entry, highlight the entry to be updated. The fields will populate with the information entered. Update desired information and click **Save**.



Timing Out

- After 80 minutes of inactivity in the application, KIDS will time out
- If the session has timed out, any unsaved information will be lost
- Save frequently

Logging out of the Application

- To log out of KIDS, click the Logout link in the upper-right corner of the screen
- Make sure you have saved everything you are working on before you click the Logout link





Receiving Service Requests

🧖 Highlights & Tips

- Once you have been referred a service by an internal user, you will be able to view that client and service by Navigating to the 'My Active Services' option on the left navigation Panel. Click on My Active Services. My Services screen will appear. Click on the Jail Services tab. Select the client and service episode and click Show.
 - The Services screen will appear with details of the service request that has been sent to you
 - If you agree to provide these services, no action must be taken in the system to approve the service request.
 - If you choose to not provide these services, click the 'Unable to Provide Services' box in the Service Information section.
 - Enter reason in the 'Specify' box
 - Click **Save** at the bottom of the screen. This will end the request and remove this client from your 'My Active Services' list.

Updating Client Information

Screens and Navigation Path

Screen	Navigation Path
General Info	Jail Collaborative > Client > General Info
Phone Number	Jail Collaborative > Client > Demographics > Phone #
AKA	Jail Collaborative> Client > Demographics > AKA
Address	Jail Collaborative > Client > Demographics > Address
Employment	Jail Collaborative> Client > Employment



🧖 Highlights & Tips

General Information

• Fields on this screen will populate with the information provided during Intake. You will have read-only access to this screen

Client Demographic Information

Phone Number

Enter all phone numbers known for the client. If the client is best reached on a certain number, include that information in the Description field

AKA

If the client goes by any other names, include this information in the AKA screen

Address

Click New to add a new address. A new line will generate on the grid and the system will clear out the address tab. Click **Edit** to open the Enter Address pop-up box. Enter the client's address and click Search. The system will search the database and check records for the address. Once it



returns the results you can select the correct address by highlighting the address. Once you select an address, the county, municipality, school district, residency, and city council district fields will automatically populate. Click **OK.** You will then be taken back to the Address screen. Click **Save**

If the Correct address does not come up in the search results, check the box next to Save
 Without Verification and press OK

Employment

Client Employment grid will show a history of all client Employment information. To add a new employment record, click New. Enter all known information is entered, click Save.
 *See Job Aid "Adding Employment Information" for detailed instructions on how to complete this screen

Adding Collateral

Screens and Navigation Path

Screen	Navigation Path
Collateral/Significant Other Information	Jail Collaborative > Collateral



Highlights & Tips

- Add a new collateral
 - If collateral has been entered previously, it will appear on the collateral grid. To add a new collateral, select **New** and enter all information known about the collateral on both the Demographics and Contact Info tabs. Click **Save.** The collateral you created will appear in the grid
 - If no collateral has been entered and the grid is empty, proceed with entering the information in the fields and click Save. The collateral you created will appear in the grid

^{*}See Job Aid "Adding Collateral and Notes" for detailed instructions on how to complete this screen.



Notes

Screens and Navigation Path

Screen	Navigation Path
Notes	Jail Collaborative > Notes



🥡 Highlights & Tips

- All Existing notes will display in the Notes History grid at the top of the screen
- To add a new note, click **New** and complete all required information
- Once a note has been saved, it cannot be updated
 - To view a previously written note, highlight the note of interest. The General Information and Notification Participants fields will populate with the information from that note

Supplemental Intake Form

Screens and Navigation Path

Screen	Navigation Path
Supplemental Intake Form	Jail Collaborative > Services > Supplemental Intake Form



Highlights & Tips

- Internal Users will fill out client information screens. However, with close access to the client, there is additional information you will be able to obtain from the Jail Collaborative clients. Such information will be documented on the 'Supplemental Intake Form"
- *See Job Aid "Completing the Supplemental Intake Form" for detailed instructions on how to complete this screen.
- You will be able to view Supplemental Intake Forms that have been completed by other providers for this client. To view these, navigate to Jail Collaborative > Services List. You can select any of the services the client is receiving/has received and click **Show**. The Services screen will appear and provide you with details of that service episode. You can then navigate to the Supplemental Intake Form by clicking that option on the breadcrumb trail (or Jail Collaborative > Services > Supplemental Intake Form). This will show all forms completed that were associated with this service episode
 - You will have read-only access to these forms
 - o To view forms for an additional service episode, navigate back to the Services List screen, highlight another service episode and click **Show.** Procedure described above

^{*}See Job Aid "Adding Collateral and Notes" for detailed instructions on how to complete this screen.



Documenting Outcomes and Measures

Screens and Navigation Path

Screen	Navigation Path
Outcomes and Measures	Jail Collaborative > Services > Outcomes and Measures

🥡 Highlights & Tips

- You are expected to complete the Outcomes and Measures screen for your clients once you have started providing services to a Jail Collaborative client
- You will only have access to complete the Outcomes and Measures screens that are related to the services you are providing. For example, if you are providing Employment and Training services, you will only be able to fill out the Employment and Training Outcomes and Measure screen
- You will need to have a client in Focus and select the service episode you are completing an Outcome and Measure for
 - Pull a client in focus
 - Navigate to Services > Services List screen. Highlight your service episode and click Show. Then select Outcomes and Measures on the breadcrumb trail (or Jail Collaborative > Services > Outcomes and Measures using the menu buttons). You will be able to complete the Outcomes and Measures screen associated with your service episode
 - o If you provide more than one type of service for a client, highlight the service you are completing outcomes and measures for on the Service(s) grid and proceed with completing the form

Referring a Client for Additional Services

Screens and Navigation Path

Screen	Navigation Path
Service List	Jail Collaborative > Services > Service List
Service	Jail Collaborative > Services > Service



🧛 Highlights & Tips

While providing services to a client, you may think it is necessary that they receive additional services. As a provider, you can make a service request for this client. This request will be sent to the internal user responsible for the client who will ultimately make the final decision whether or not the client will receive this service. If the internal user approves the request, they will select the provider to provide this service. You will not be able to select the provider when making the request

^{*}See Job Aids for filling out the Outcomes and Measures screens.



- The 'Service List' screen will show a history of the services the client has been referred to
 - To view all current services, select the radio button beneath the grid next to View all **Current Services Episodes**
 - To view a complete history of all services (from the current intake and previous intakes, if applicable) select the radio button beneath the grid next to View All Service Episodes
 - To refer the client for a new service, select **New** beneath the Services List grid and complete the screen

Admin

Activities

- Tracking Documents
- Adding to/Accessing the File Cabinet

Screens and Navigation Path

Screen	Navigation Path
Document Tracking	Jail Collaborative > Document Tracking
File Cabinet	Admin > File Cabinet



🎧 Highlights & Tips

Document Tracking

TIP: Client must be in focus to upload a document for that client.

- Navigate to the 'Document Tracking' screen (Jail Collaborative > Document Tracking)
- The Documents grid will display a list of all the documents that have been uploaded for that client.
- Add a new document;

TIP: If there are no documents in the grid, proceed to the Document Information section to complete the details about the client

TIP: If there are documents previously entered, the fields in the Document Information will populate with the information from the Document that is highlighted. Click **New**. The fields will empty in the Document Information Section

- Select the Document Tracking dropdown. Select either 'Assessment', 'Plan', or 'Other.' TIP: Make sure you select the right type. This will ultimately guide what folder in the 'File Cabinet' this document is uploaded to
- Enter narrative comments about the document being uploaded in the Description field
- Click Save
- Click **Import.** A dialog box will open. Click **Browse** next to the *File Name* field and locate the file you wish to upload. Click on the file and then click **OK** (or double click on the file). The pathway to the file you selected will populate in the File Name field
 - o Enter narrative comments in the Document description field. Click **OK**

^{*}See Job Aid "Referring a client for a new service" for detailed instructions on how to complete this screen.



o A pop up will verify that your document has been added to the file cabinet

File Cabinet

TIP: Client must be in focus to view the file cabinet and documents for that client.

- Navigate to the 'File Cabinet' screen (Admin > File Cabinet)
 - For each client, there will be three folders; 'Assessment', 'Plan' and 'Other'. All documents uploaded for this client will appear in these folders.

 TIP: Documents will appear in each of these folders based on the Document Type that was selected on the 'Document Tracking' screen

 TIP: Use the (+) and (-) signs next to the folder names to expand the folder
 - Highlight a document and click Show to open this document
 - Highlight a document and click **Details** to view the details of this document



Reports

Screens and Navigation Path

Screen	Navigation Path	Description
Reports	Jail Collaborative > Reports	Client-specific reports
Reports	Admin > Reports	Provider-specific reports

Summary of Reports

Focus	Title	Parameters	Data Elements
Client Reports Client reports are generated with regard to a single client. To generate a report for a specific client, pull that client into focus and navigate to	Client Information Report	Client in focus	-Demographic Information -Sentenced Information -Employment History -Service Details
the <i>Reports</i> screen (Jail Collaborative > Reports). Highlight the report you would like to generate and click Preview .	Active Client Detail Report	Client in Focus	-Demographic Information -Sentenced Information -Employment History -Service Details -Details of Outcomes and Measures for each service received by this client from your agency
Provider Reports Provider reports are generated with regard to a specific provider and a specified date range. To generate a report for a	Aggregate Active Client Report	Start and End Date	Aggregate counts of clients receiving services during the selected date range for the provider(s) selected
provider, navigate to the Reports screen (Admin > Reports). Highlight the report you would like to generate and click Preview.	Aggregate Exit Client Report	Start and End Date	Aggregate counts of client that exited services during the selected date range
The 'Jail Reports' box will appear. Enter the date parameters for the report (Start Date and End Date. Click OK .	Provider Service Statistical Report	Start and End Date	Aggregate counts of clients receiving services for the selected date range with detailed demographics breakdowns



Closing a Service

Screens and Navigation Path

Screen	Navigation Path
Service List	Jail Collaborative > Services > Service List
Service	Jail Collaborative > Services > Service

Highlights & Tips

- The 'Service List' screen will show a history of the services the client has been referred to
 - Highlight the service episode you wish to end and click Show
 - Complete the screen

^{*}See Job Aid "Referring a client for a new service" for detailed instructions on how to complete this screen.



Quick Tips

- If make a mistake on a screen, click **Cancel**. This will erase all the information you have entered and you can start from scratch
- If you have logged in and there is an error or the application doesn't launch, check to make sure your browsers pop-up blocker is turned off