COMMUNIFY

TAY PROGRAM

How to Guide for eLogic Genesis

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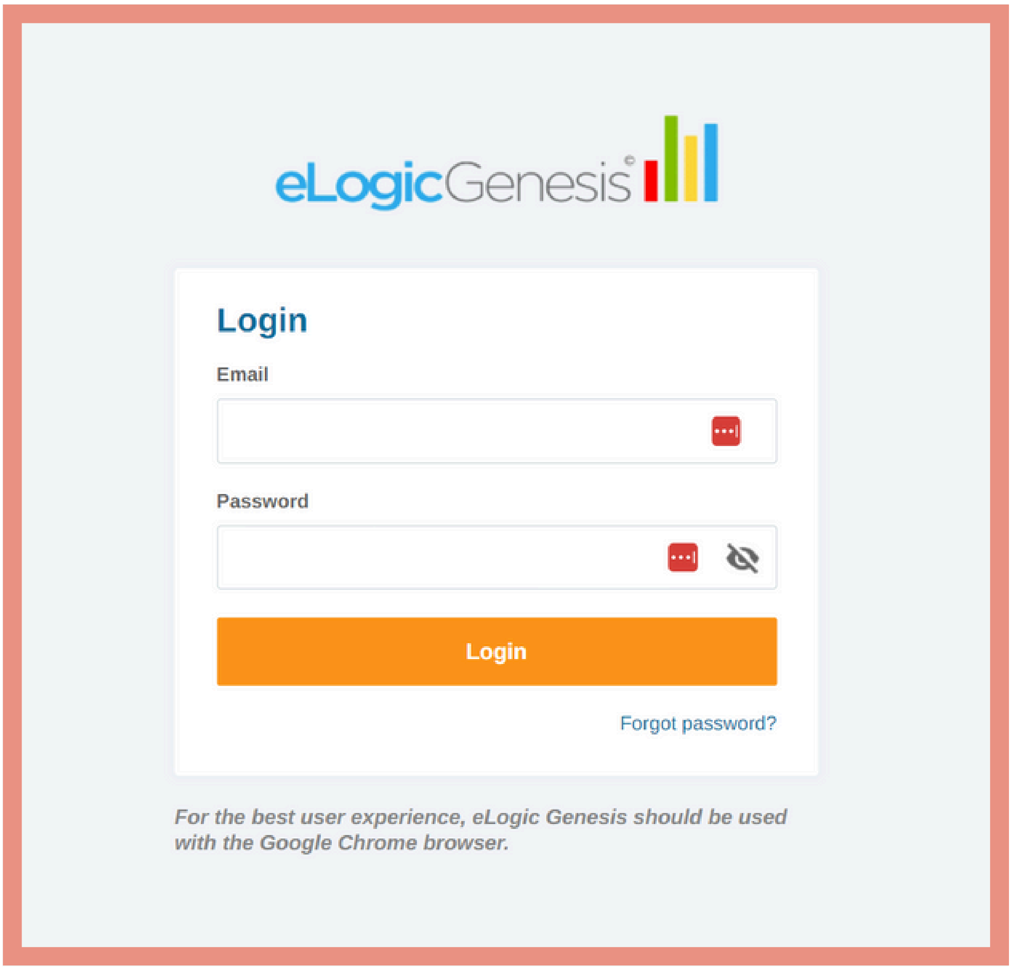
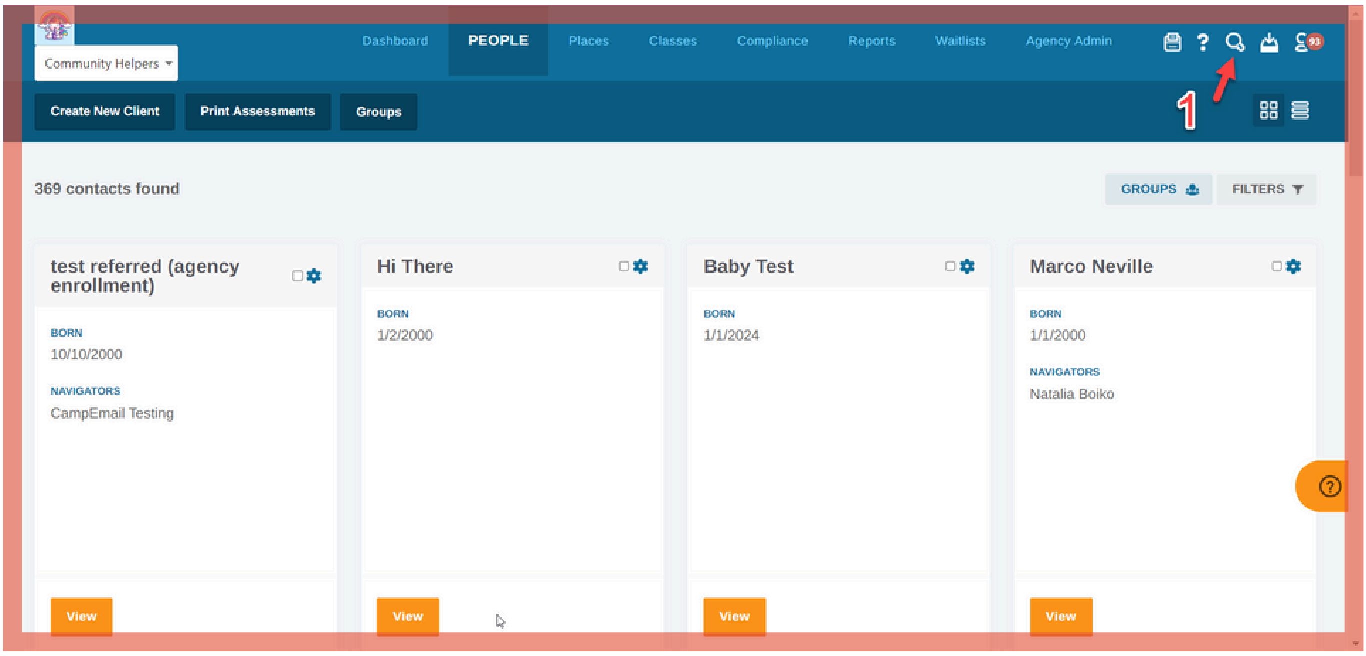
LOGGING IN

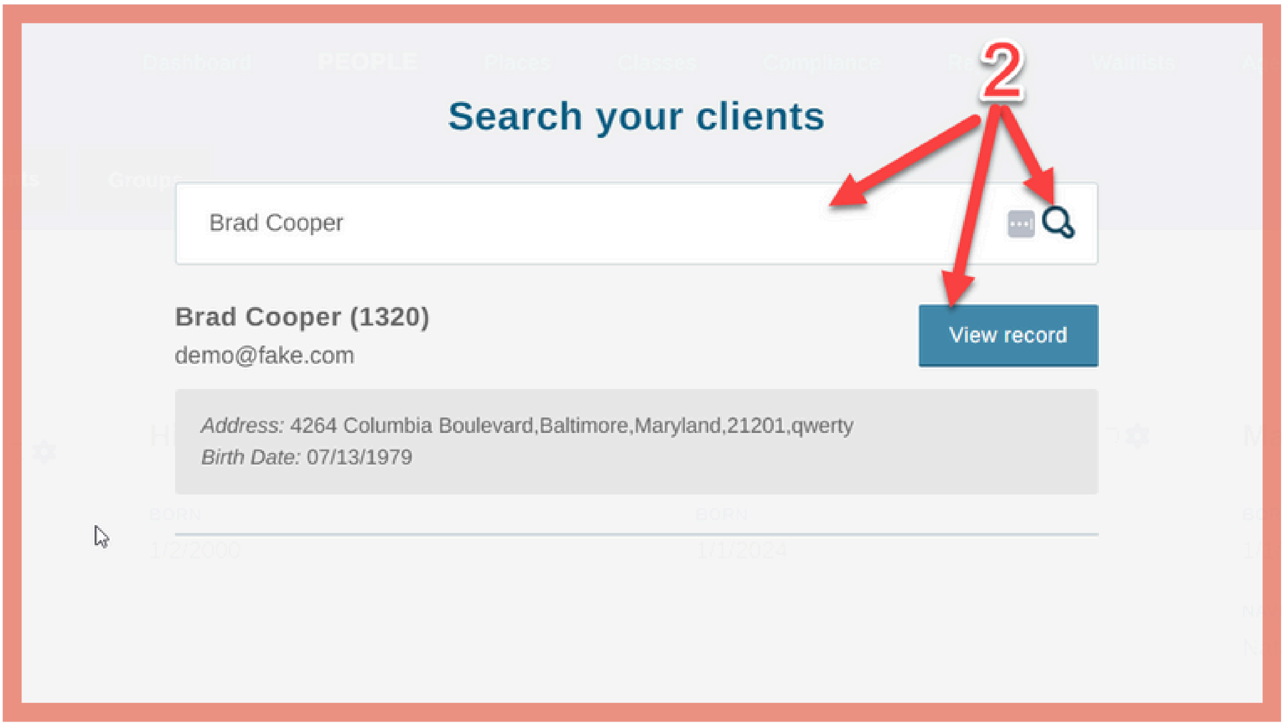


1. Open your web browser and navigate to the eLogic Genesis login page. Log in using your TAY Case Manager credentials.
    - You will be taken to the main dashboard after successfully logging in.

SEARCHING FOR EXISTING CLIENTS



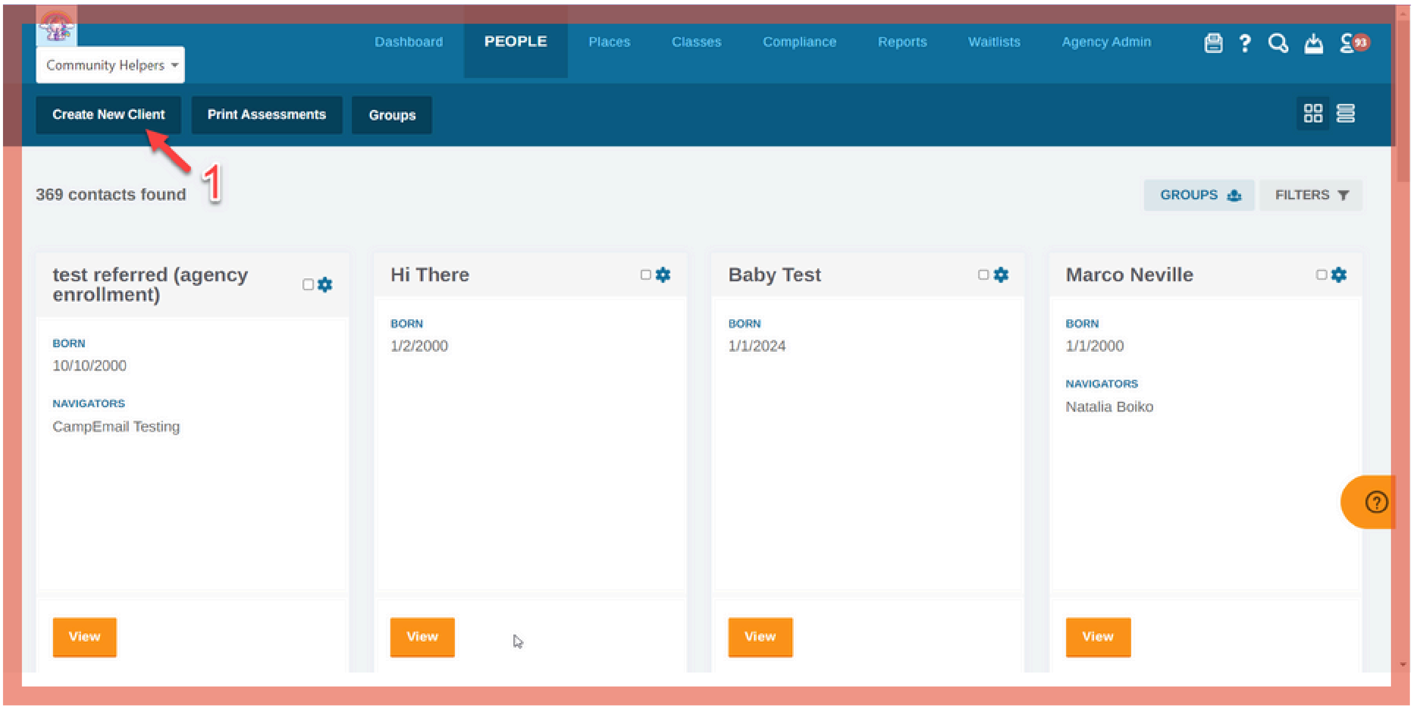
1. In the top right-hand corner of your screen, locate the Global Search (magnifying glass icon). Click the icon to open the search bar.



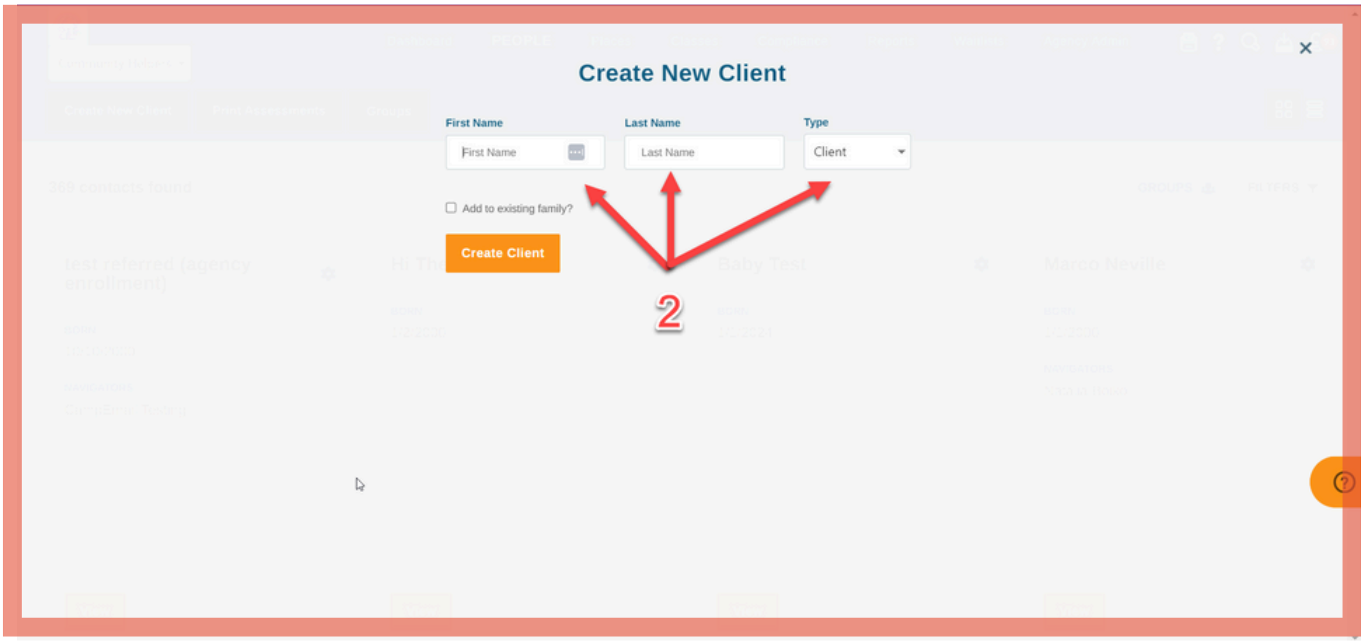
2. Type the client's full name into the search bar. Press Enter or click the search icon to view results.

- If the client exists in the system, their record will appear in the search results. Click on their name to open their profile.
- If no matching records appear in the search results, this indicates that the client does not exist in the system.

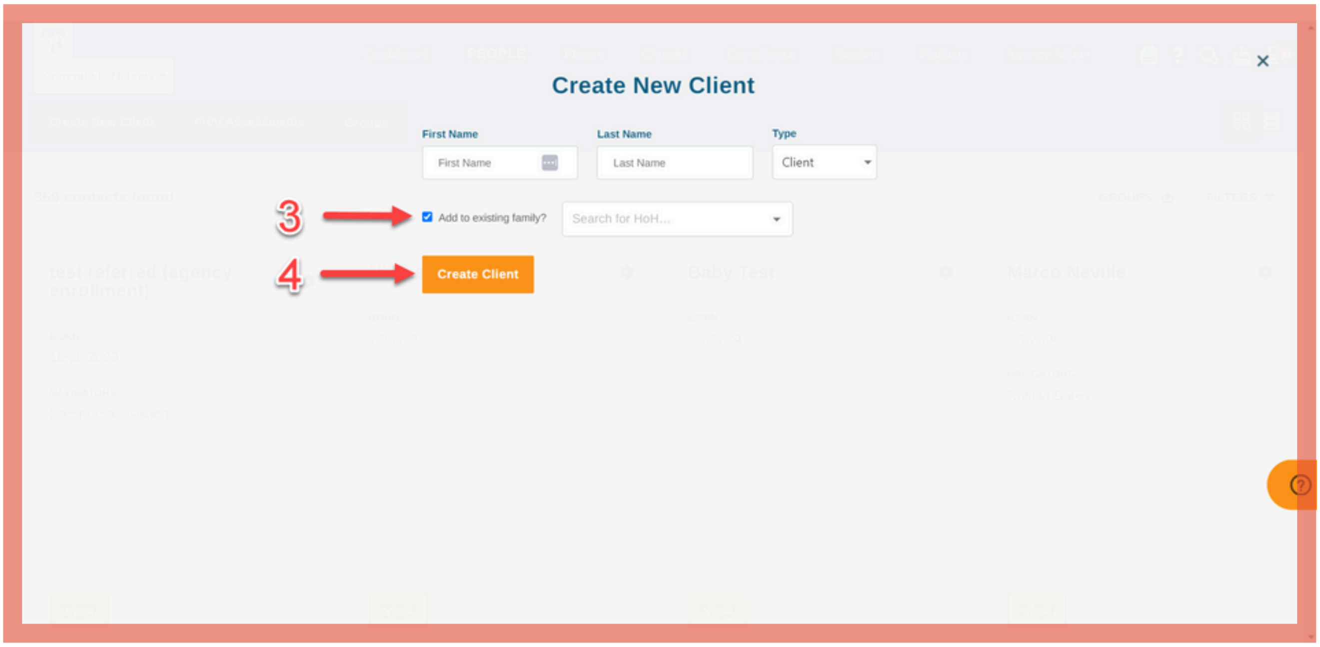
CREATING NEW CLIENTS



1. To create a new client, click the Create New Client button.
    - A popup will appear where you can enter the client's details.



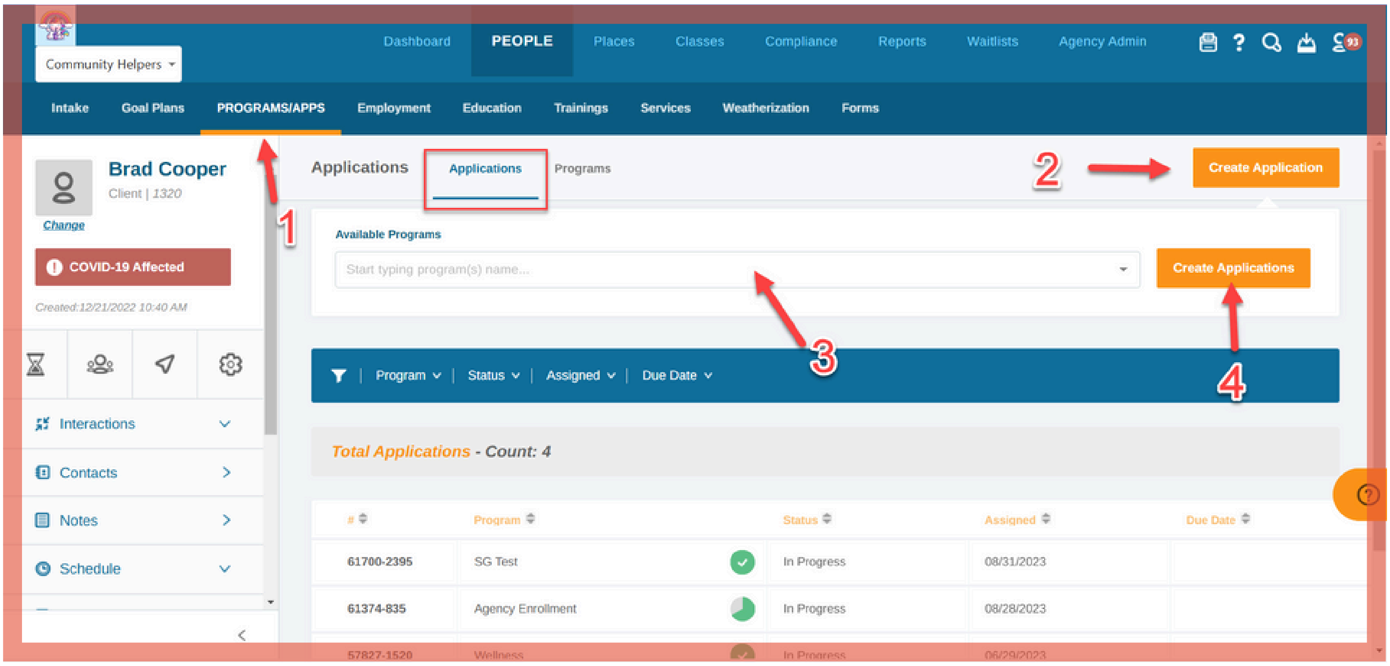
2. Fill in the following information:
    - First and Last Name: Enter the client's legal name.
    - Client Type: Select the client type from the dropdown



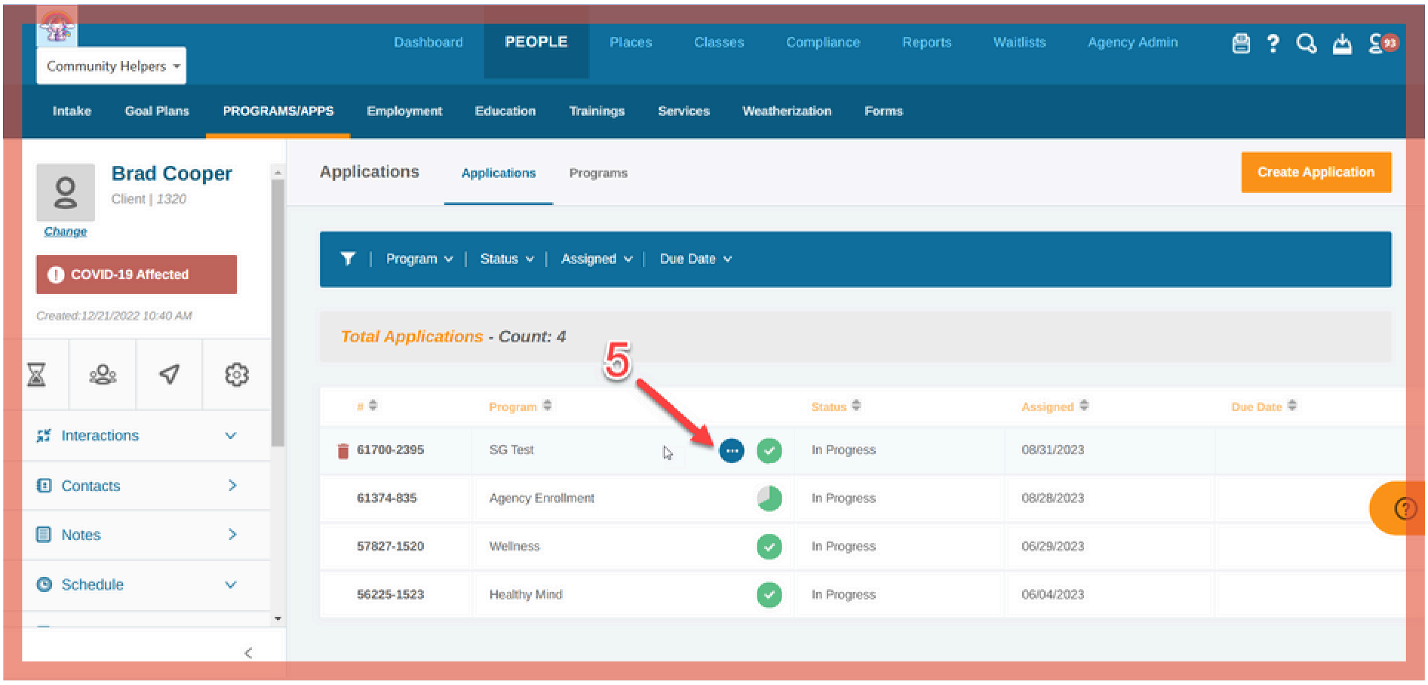
3. If the client is part of an existing family, check the Add to Existing Family box and search for the head of household's name.

4. After entering all necessary details, click Create Client.
    - The system will generate a new client profile and take you to the client's intake screen.

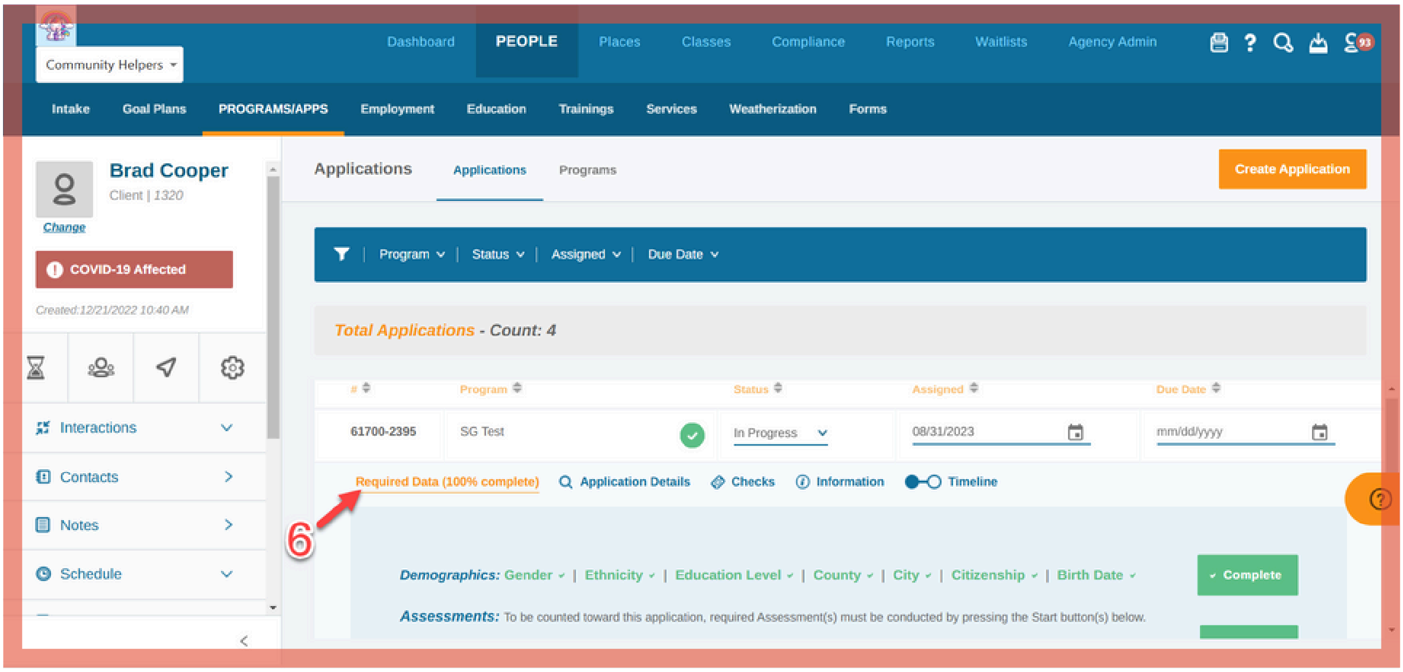
CREATING APPLICATIONS



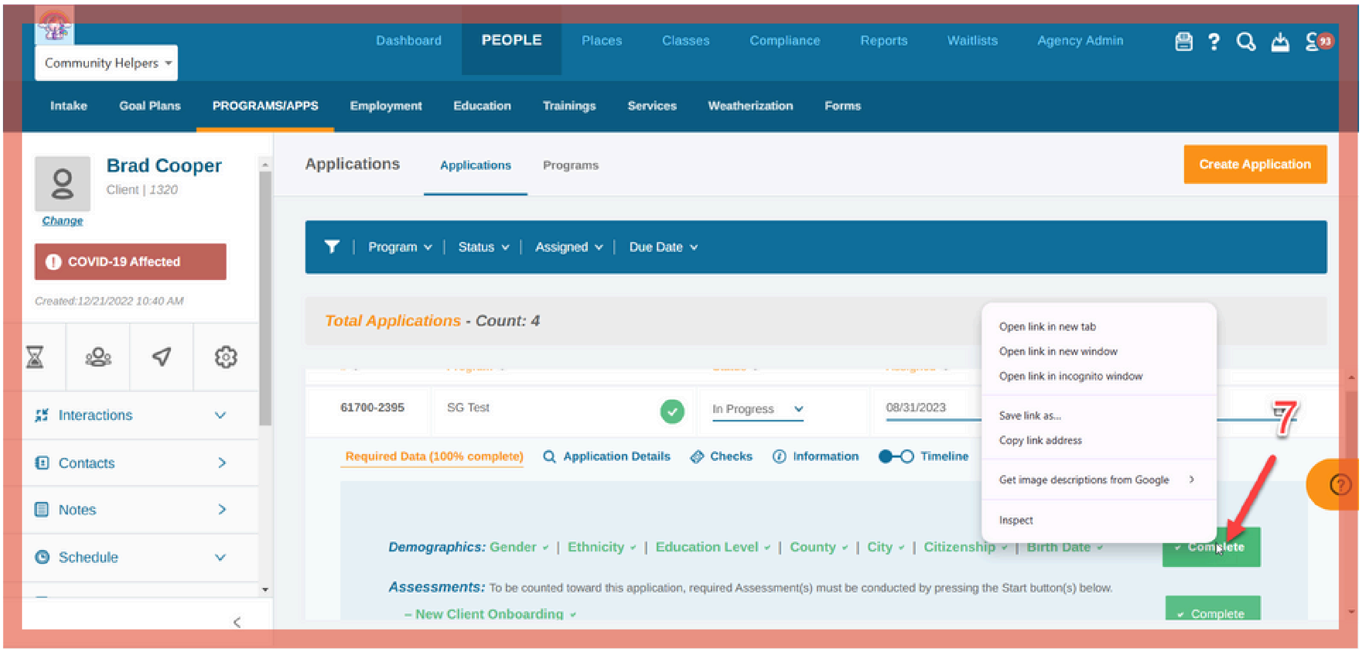
1. Once the client’s record is created, navigate to the Programs/Apps Tab to begin the application process.
2. In the Applications Tab, click Create Application.
   a. A dropdown will appear.
3. Select Transitioned Aged Youth (TAY) from the list of available programs.
4. Once selected, click Create Application.
   a. This will generate the TAY Program Application in the client’s record.



5. Once the TAY application has been created, click the ellipsis (three dots) on hover next to the application to expand the application details.

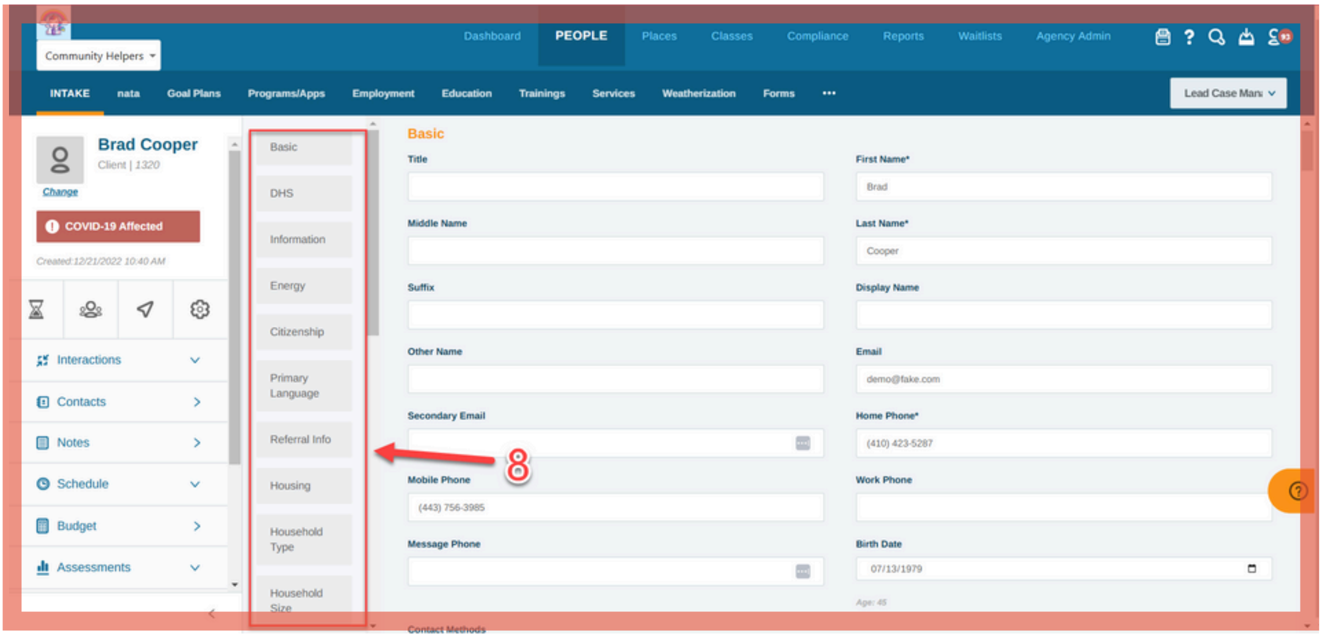


6. Complete all Required Data, including:
   - Demographics
   - Assessments



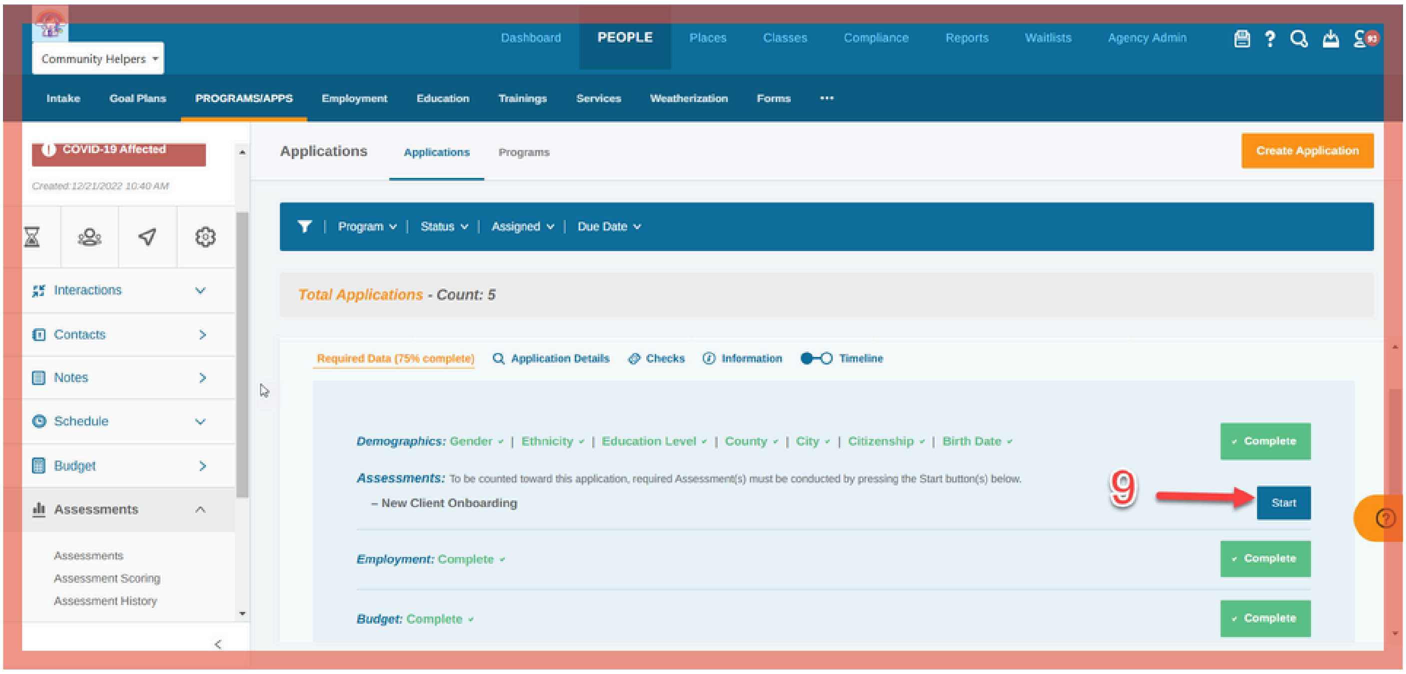
7. Completing Required Demographic Fields:

- Right-click the Continue button to open the Demographics tab in a new window, which allows you to complete demographic details without leaving the application screen.



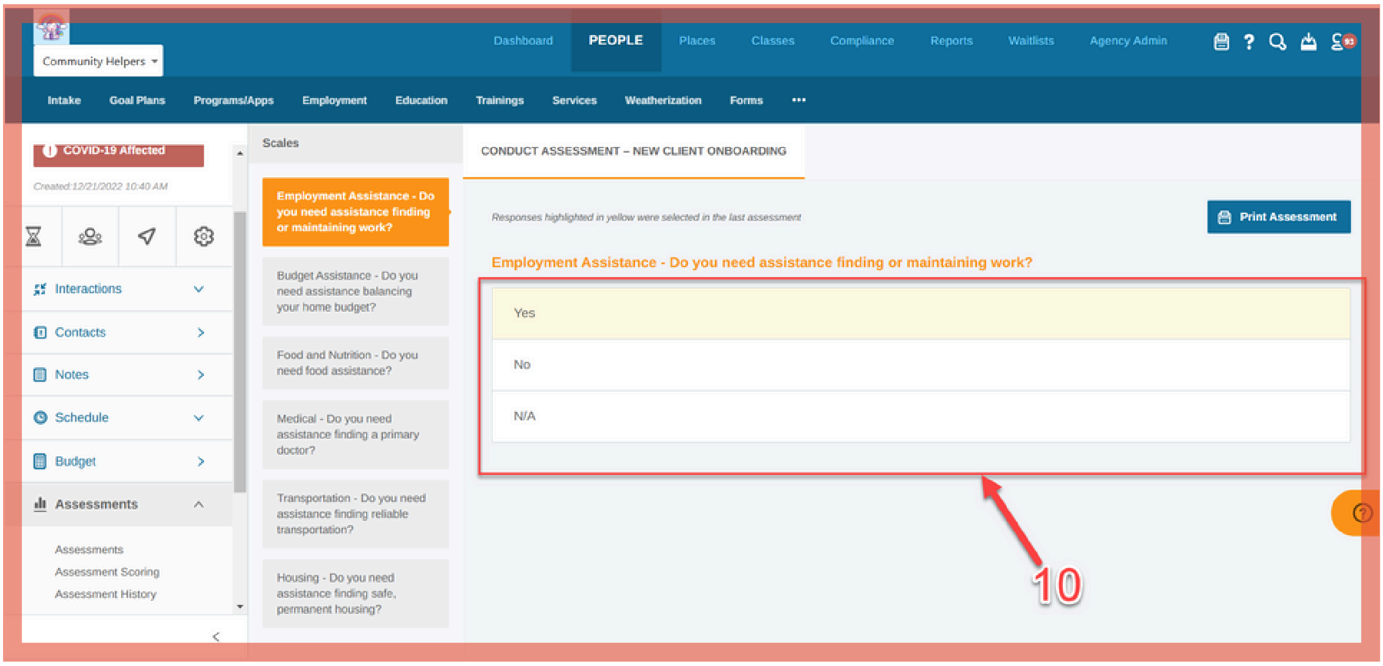
8. Completing Required Demographic Fields:

- Complete all CSBG Demographics in the intake tab, marking N/A or Unknown/Not Reported where needed.
- *Note: All mandatory fields must be completed to proceed with remaining steps.*



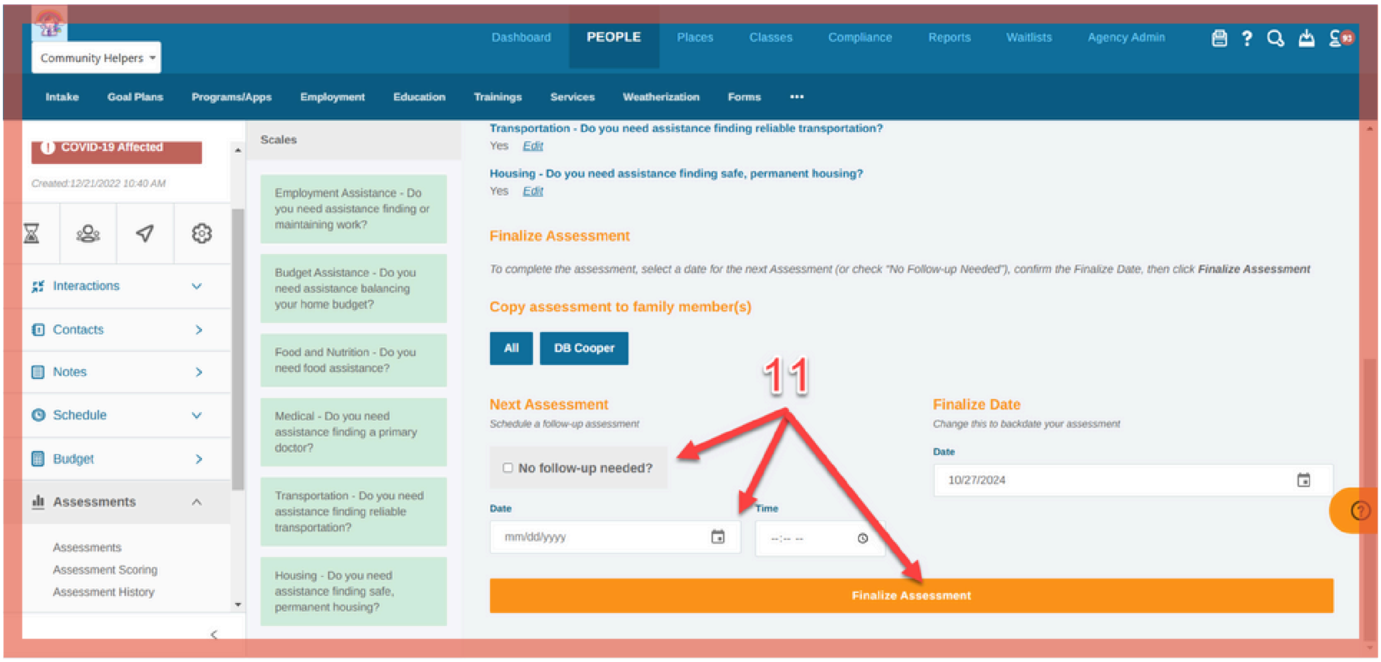
9. Completing Required Assessment:

- Click Start to complete the TAY Outcome/NPI Assessment. Answer the assessment questions, and note if/when a follow-up is required.



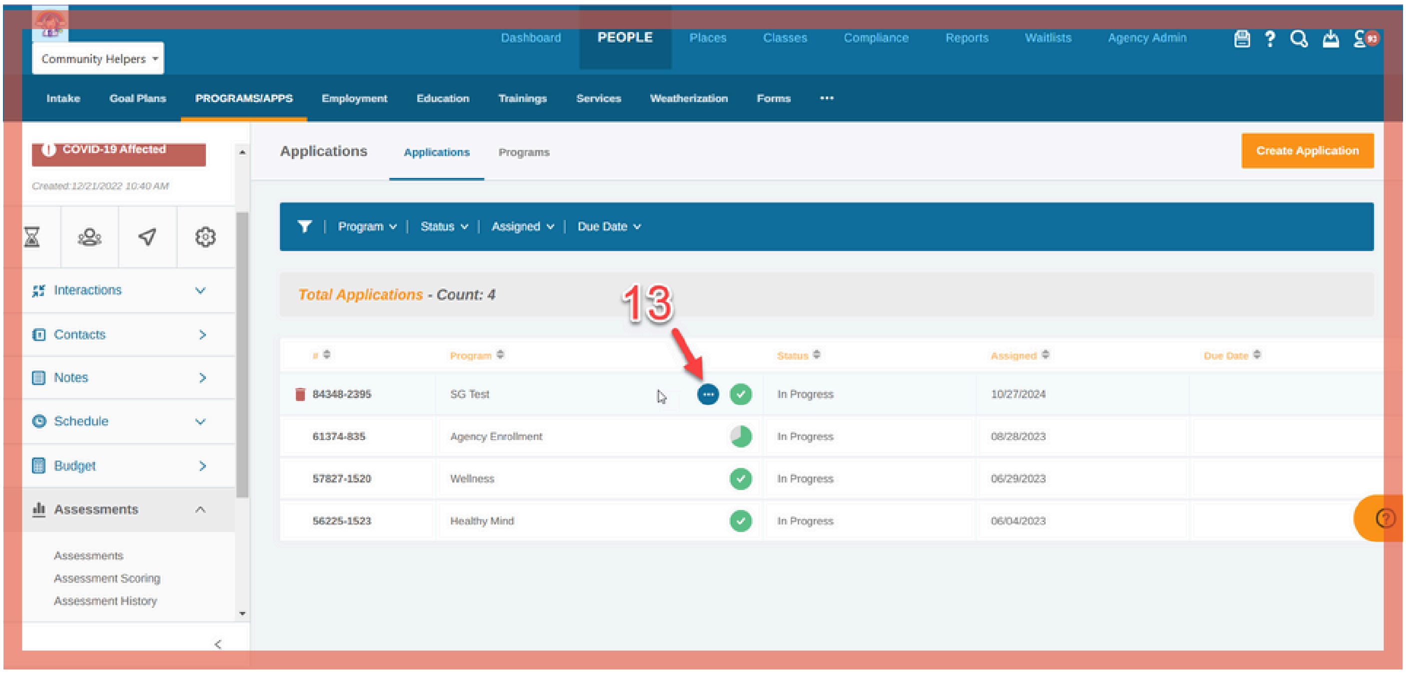
10. Completing Required Assessment:

- Question Responses: For each assessment question, select the most accurate answer from the radio button options.
  - The system will save your answers automatically as you go, validating completed fields with a green checkmark.

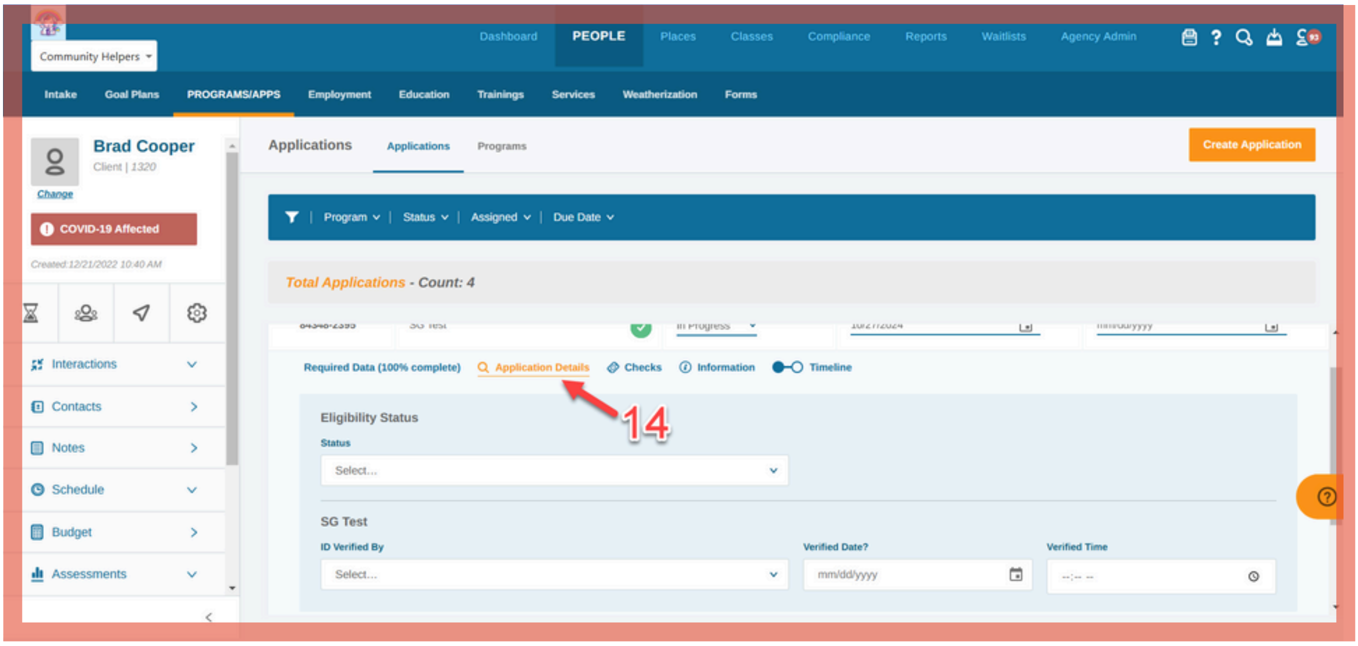


11. Completing Required Assessment:
   - If a follow-up is required, enter the appropriate date and time for the next assessment. If no follow-up is needed, check the No Follow-Up Needed box.
   - Once all questions are completed, click Finalize Assessment.

12. Completing Required Assessment:
- A score or summary of the assessment will be displayed, and the assessment will be saved in the client’s profile under the Completed Assessments section.
- *Note: You may need to complete multiple assessments to track outcome movement for the Annual Report.*

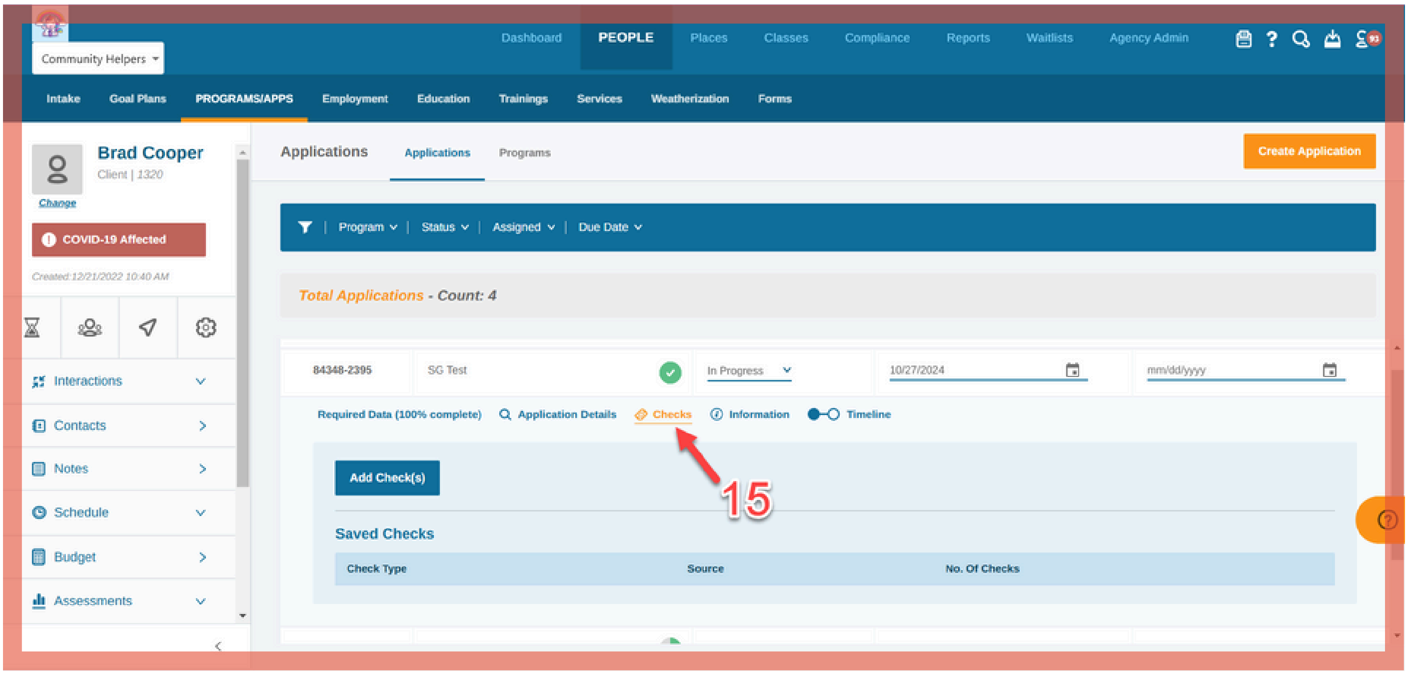


13. Navigate back to the Applications Tab, locate the TAY Program Application, and click the ellipsis (three dots) on hover to expand and view details.



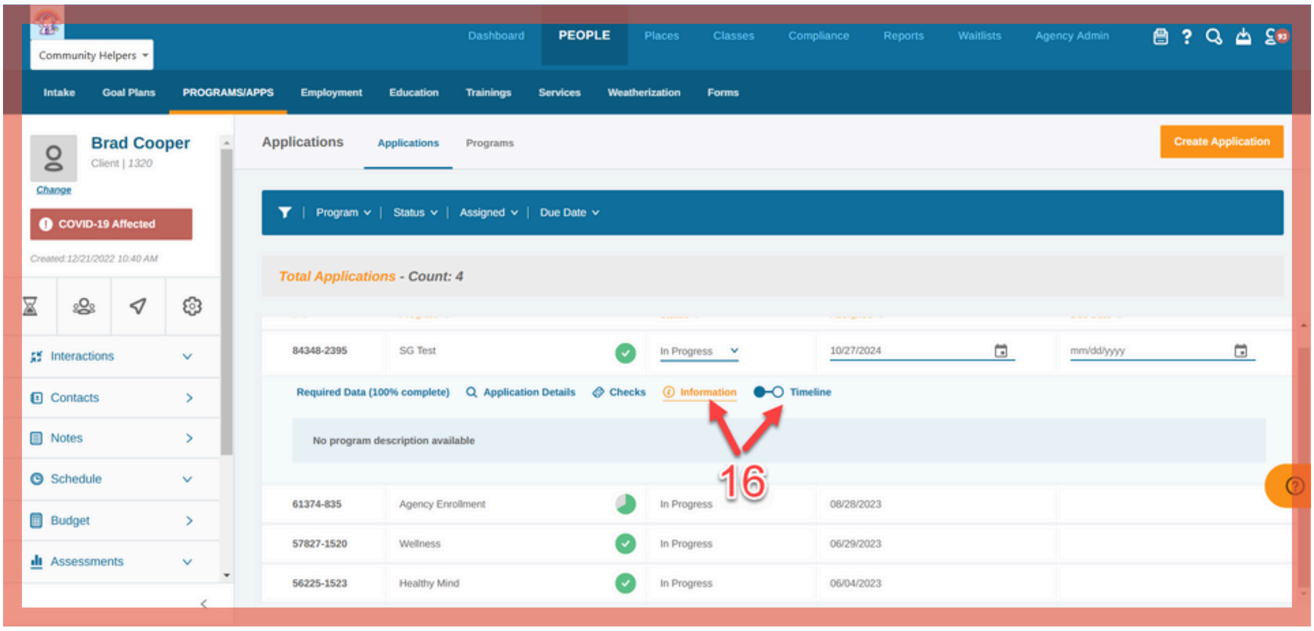
14. Verifying and Editing Application Details:

- Verify Identification:
    - If you need to verify the client's identification, click the Application Details subtab under the expanded application.



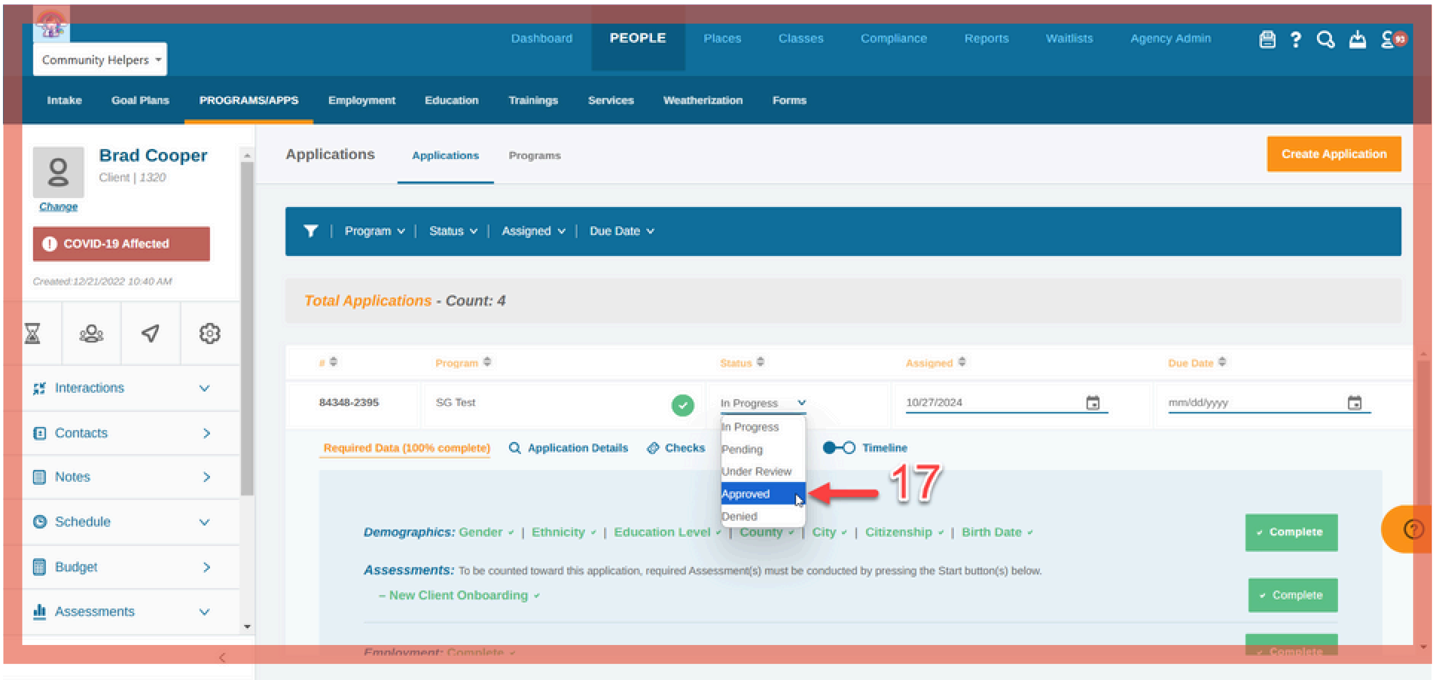
15. Verifying and Editing Application Details:

- Upload Relevant Checks:
  - If you need to upload any checks or supporting documents, click the Checks subtab.
  - You can upload scanned copies of checks or other verification documents directly to this section.



16. Verifying and Editing Application Details:

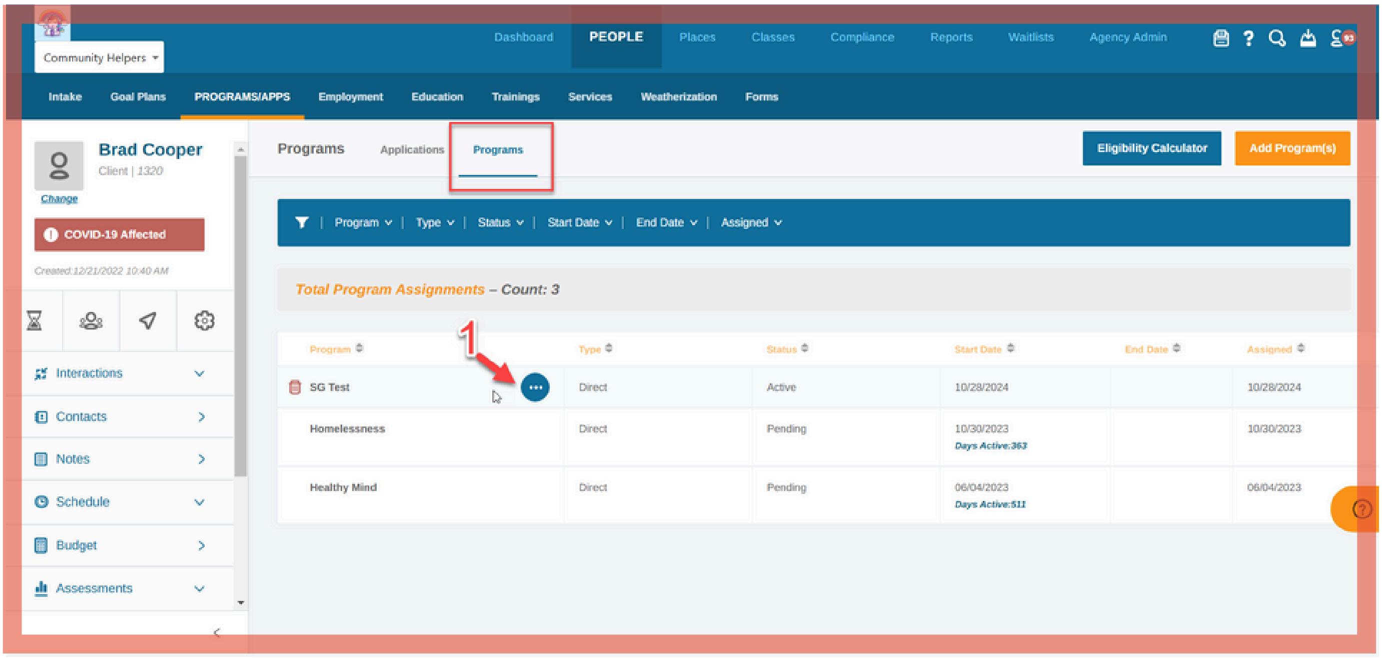
- Viewing More Information:
  - If you need additional information about the application, click either the Information or Timeline subtab.
  - The Information tab displays key details about the application's current status, while the Timeline tab allows you to track when certain actions were taken.



17. Finalizing and Approving the Application:

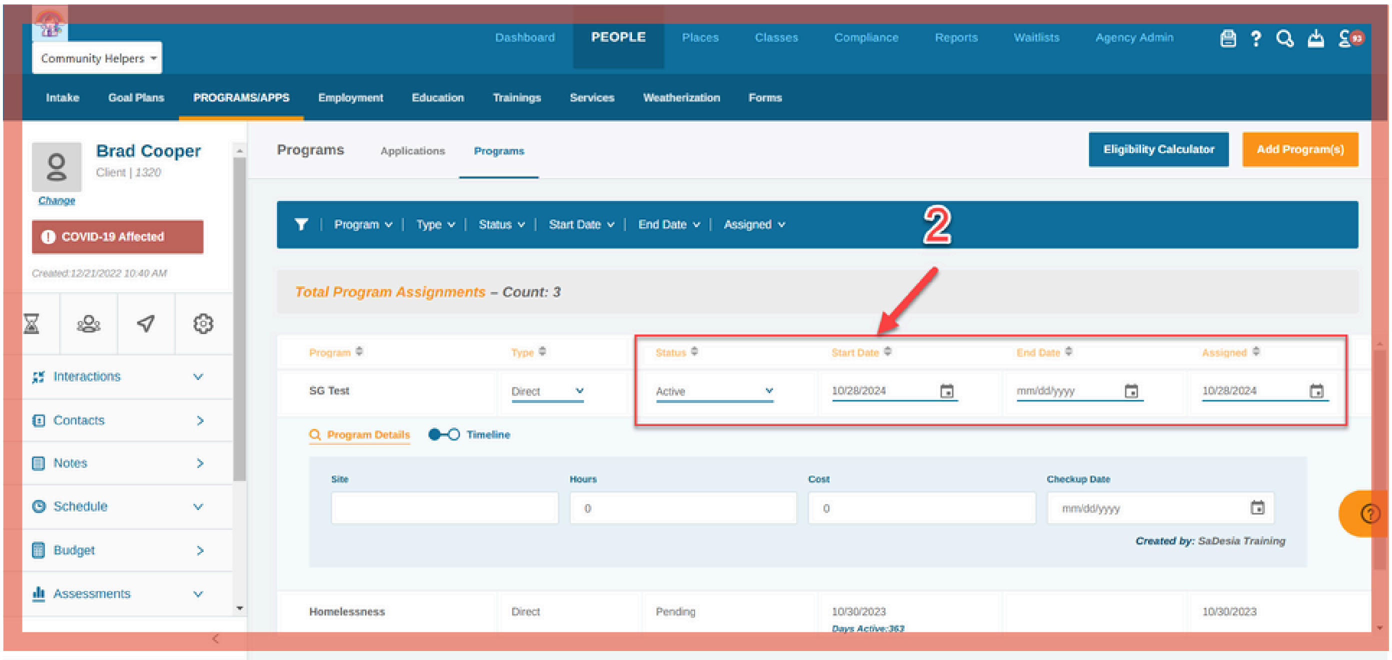
- Once all required information is complete, update the application status to Approved from the status dropdown menu.
- Click Save Changes to confirm the approval.
    - A confirmation message will appear at the top of the screen if you wish to proceed with finalizing the application.

PROGRAM ENROLLMENT



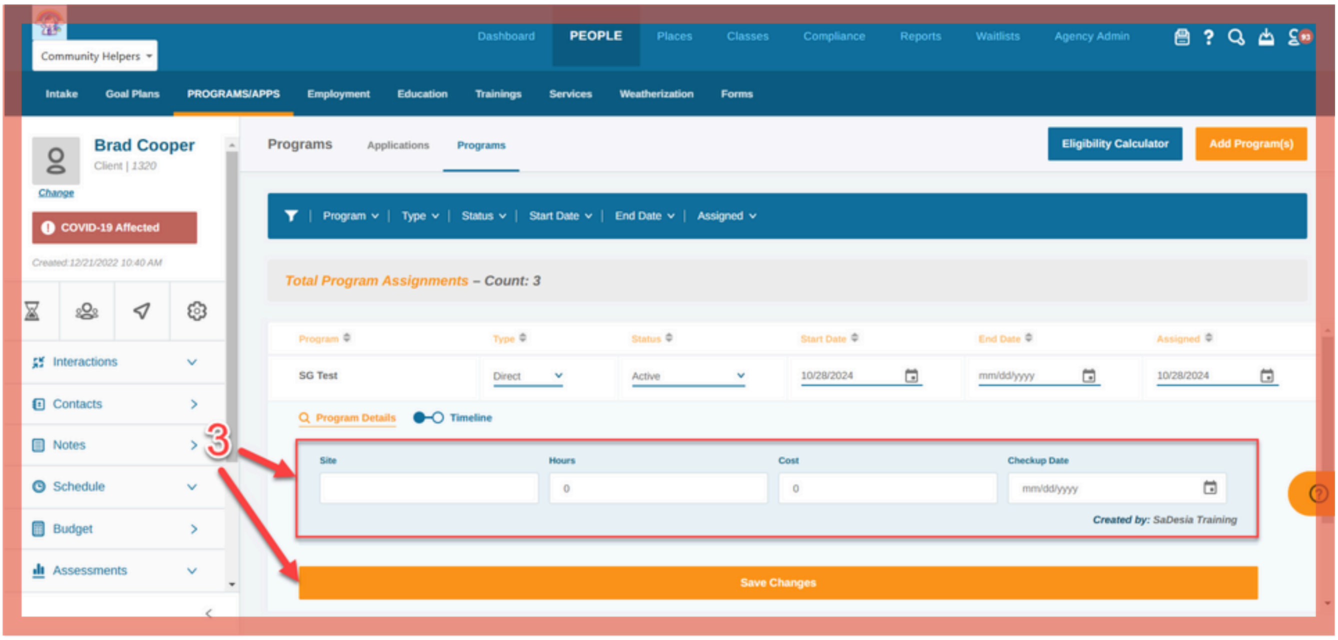
1. Accessing Program Enrollment Details:

- Click the Programs Tab in the client's profile.
- You will see a table of all programs the client is enrolled in, including the newly generated TAY Program Enrollment.
- Locate the TAY Program in the list, and click the ellipsis (three dots) on hover next to the program to expand the program details.



2. Edit Key Program Information:

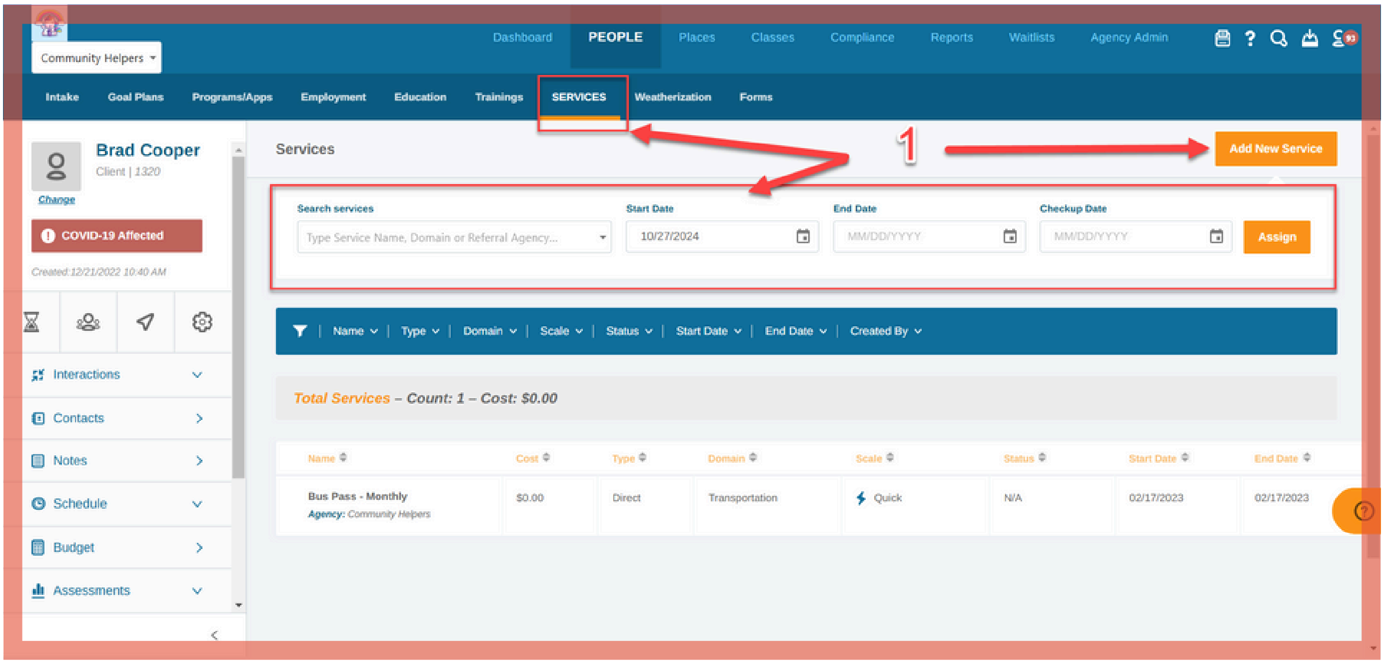
- Status: Update to reflect the client's current enrollment stage (e.g., Enrolled, Pending, Completed).
- Start and End Dates: Review and adjust these dates to accurately reflect the program enrollment period.
- Assigned Program Date: This defaults to the approval date but can be modified if necessary.



3. Additional Program Details:

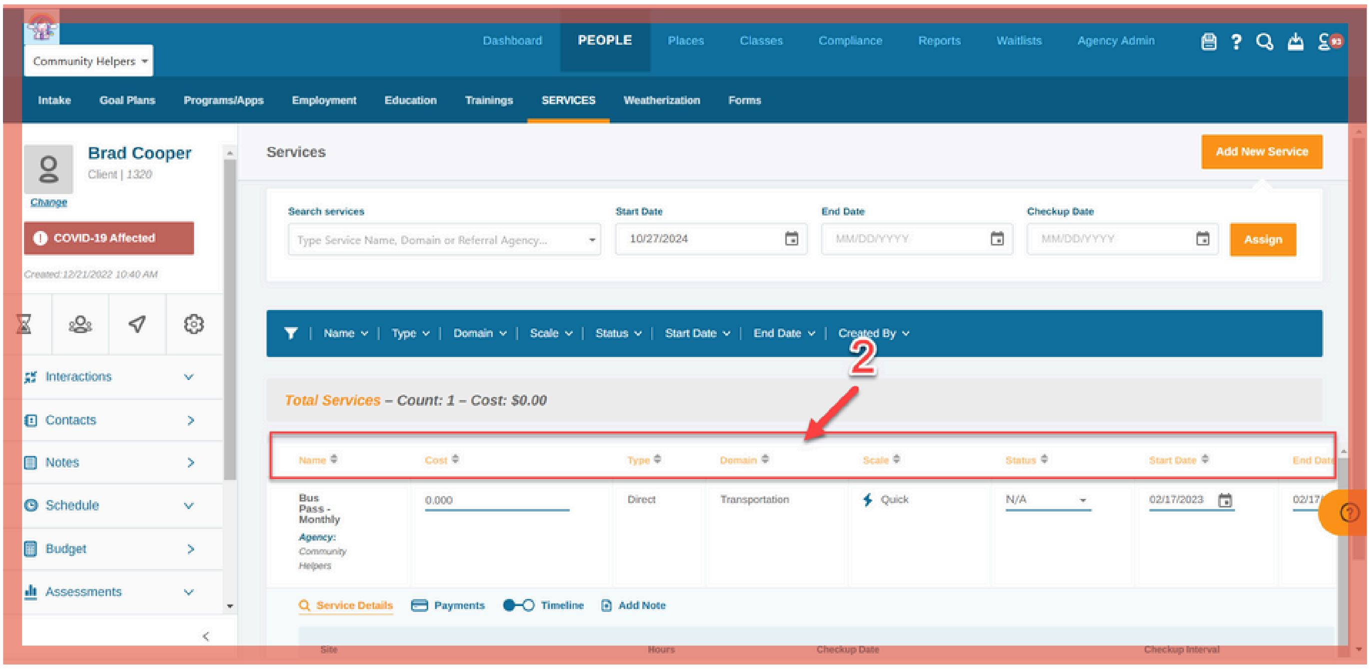
- Edit fields as needed:
  - Site: Specify the location where the program is conducted.
  - Hours: Enter the number of approved hours for program participation.
  - Cost: Add any applicable program costs.
  - Check-Up Date: Set the next check-up or review date to monitor client progress.
- Click Save Changes at the bottom to confirm all updates.

ADDING SERVICES



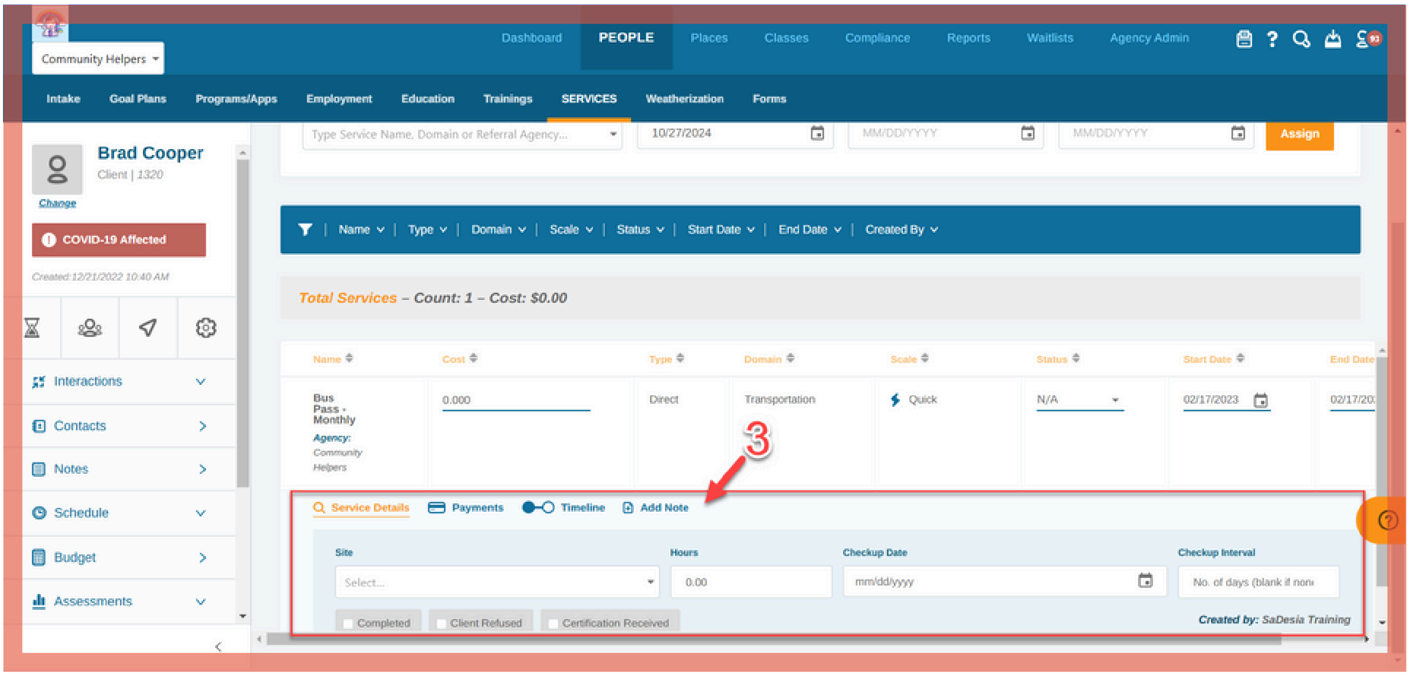
1. Adding a New Service

- Go to the client's Services Tab and click Add New Service.
- In the search bar, type TAY to find and select Health Care: Mental Health Counseling – Hospitalization (TAY).
- Enter relevant Start Date, End Date, and Check-Up Date for the service, then click Assign Service to add it to the client's record.



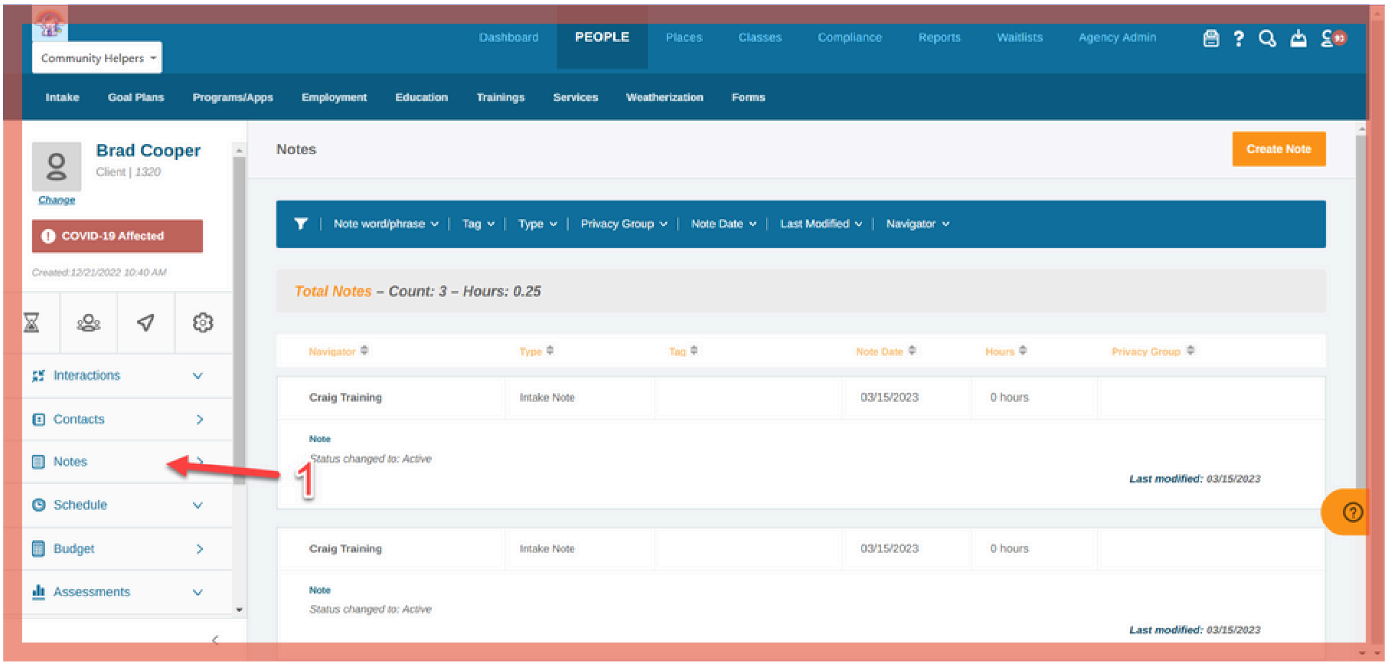
2. Managing Service Details

- In the Services Table, click the ellipsis (three dots) next to the service to expand details.
- Edit as needed:
  - Cost: Enter service cost, if applicable.
  - Status: Update the current service status (e.g., Approved, Denied).
  - Start/End Dates: Adjust these dates if needed.

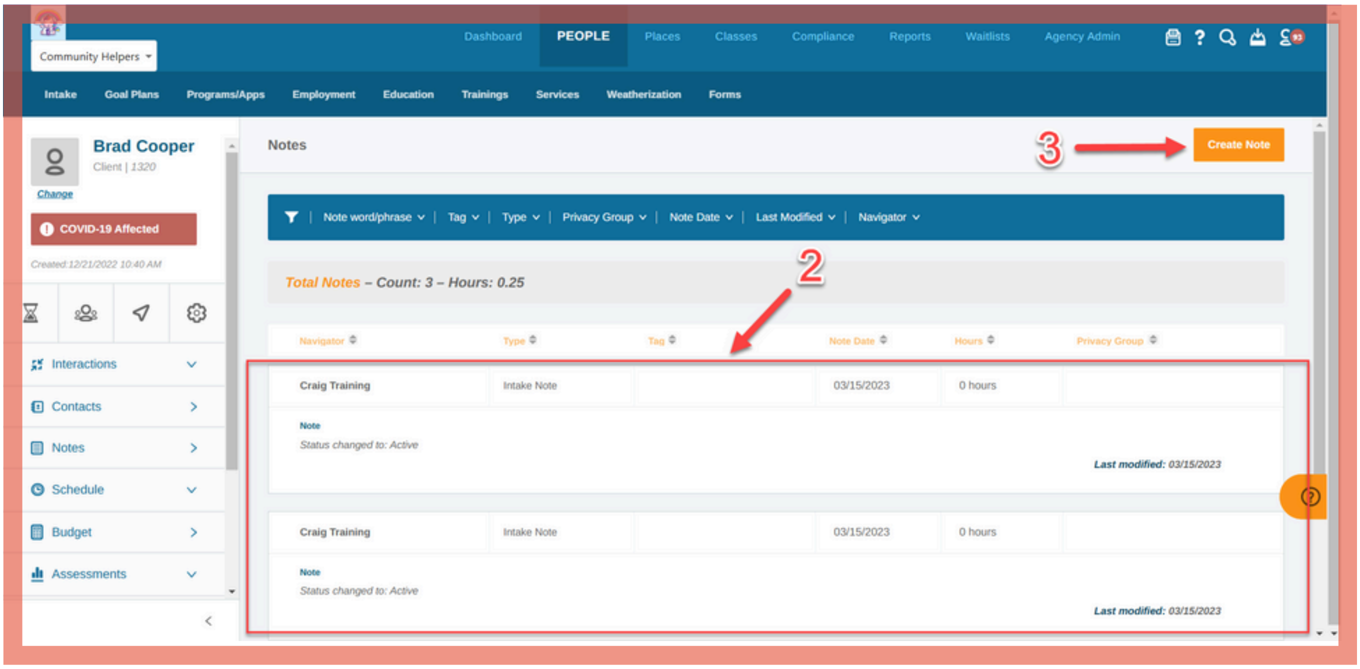


3. Additional Service Information:
   - Site: Enter location if applicable.
   - Hours: Input allocated hours.
   - Check-Up Date: Set the next review date.
   - Checkboxes: Mark Completed, Client Refused, or Certification Received.
   - Payments: Add any payment details.
   - Timeline: View service history.
   - Notes: Add relevant notes.

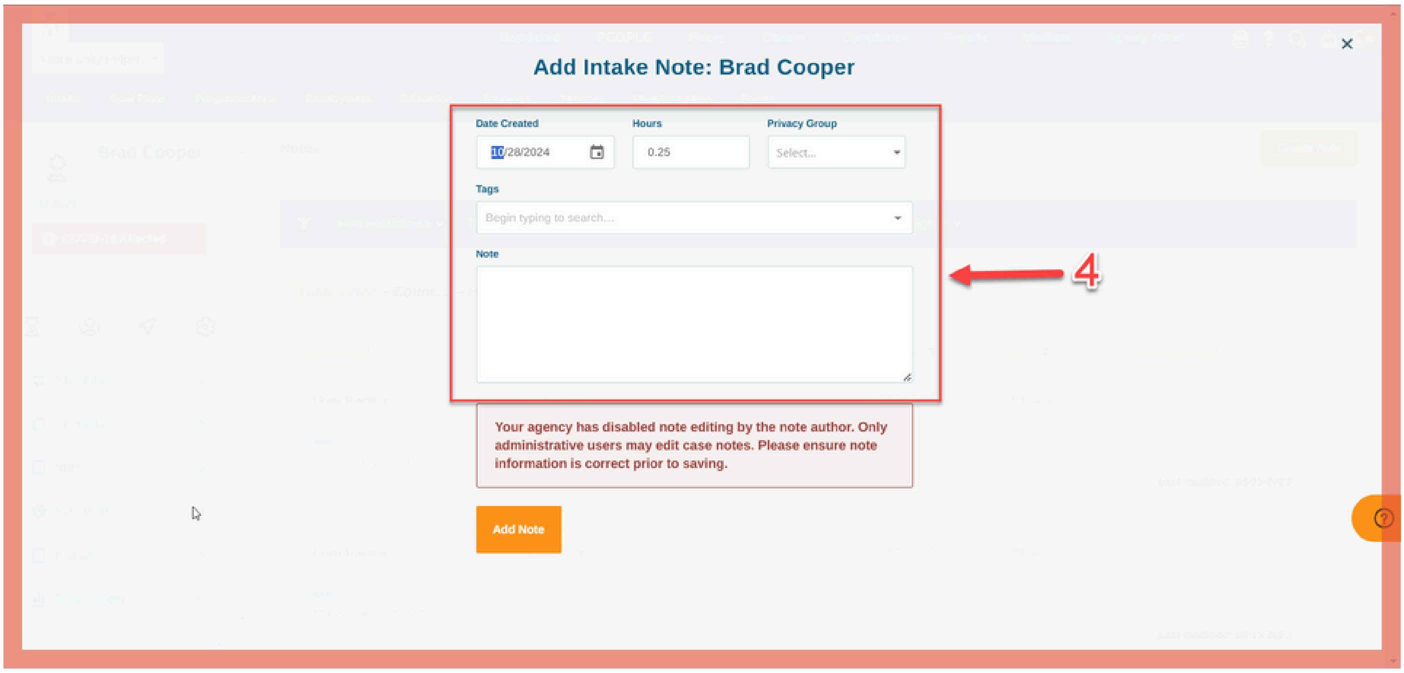
CREATING NOTES



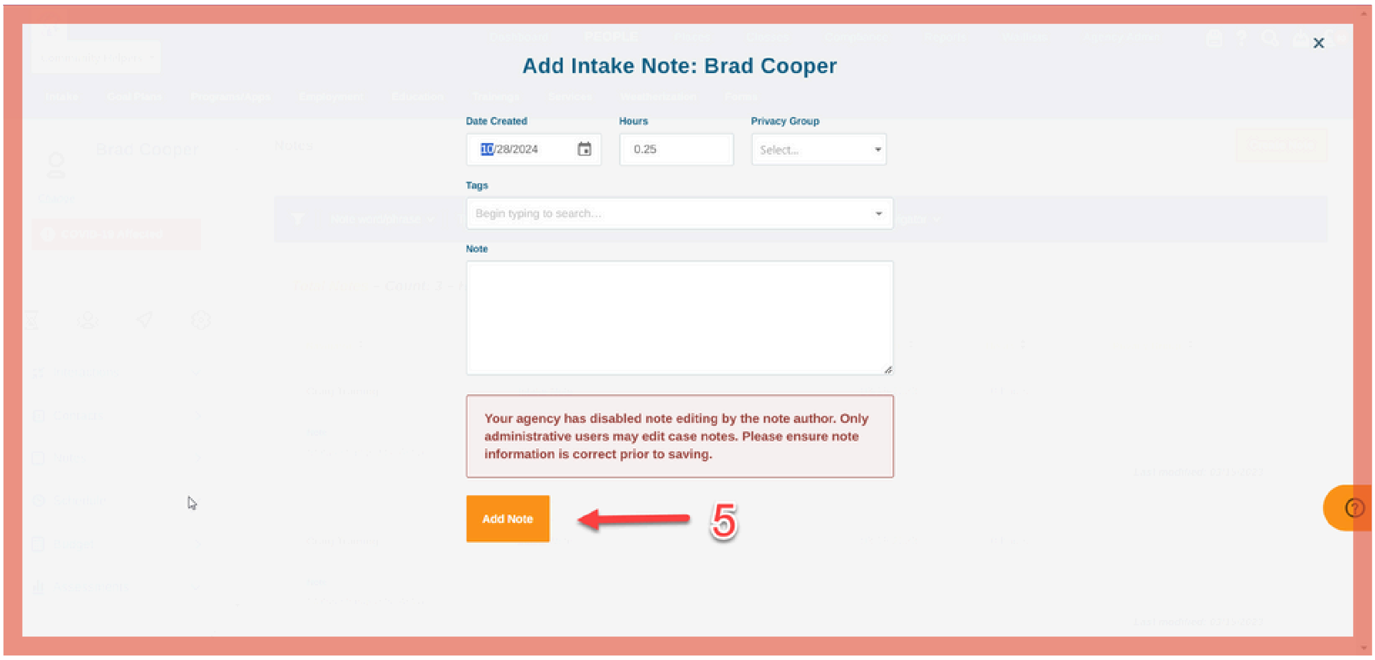
1. In the client's record, click on the Notes Tab located in the left-hand navigation bar.
   - This section allows you to view all existing notes related to the client's progress, services, and interactions.



2. Viewing Existing Notes:
   - All previously added notes will be listed in chronological order.
   - You can review any of these notes to get a summary of past interactions or updates on the client's case.
3. Create a note by clicking Create Note.

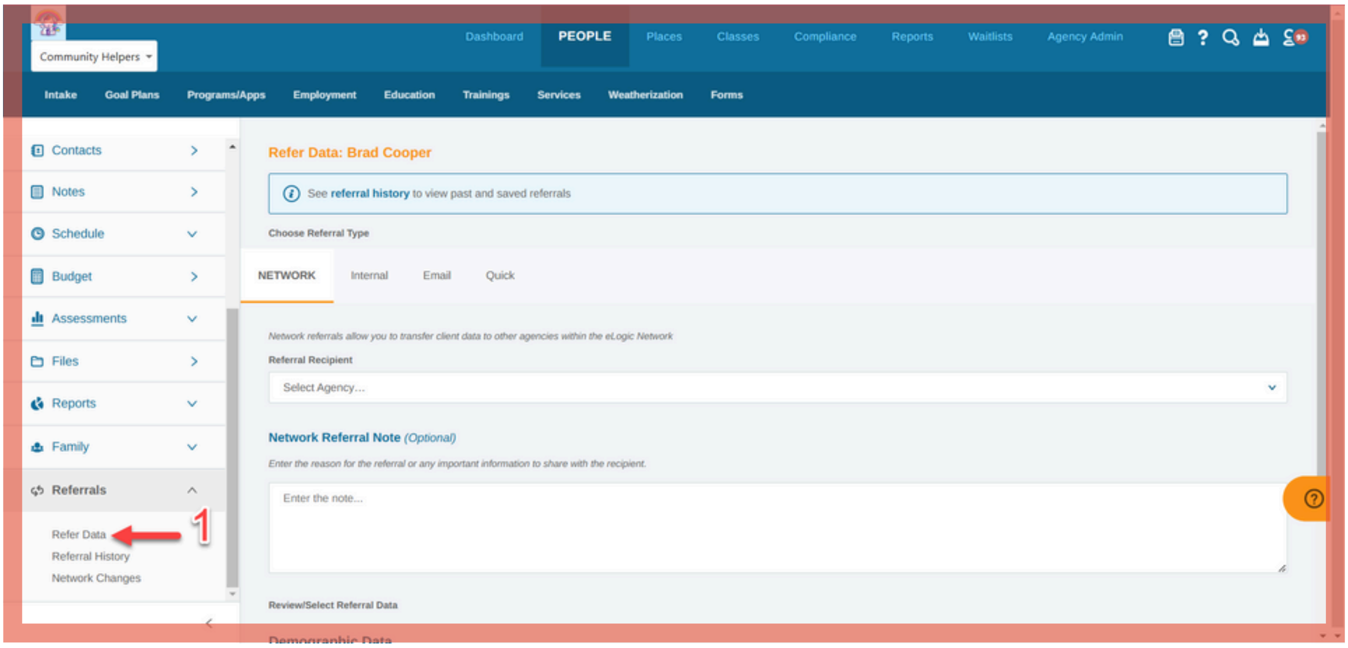


4. An overlay will allow you to enter these details:
    - Date Created: The time and date will be saved automatically.
    - Hours: Optional If relevant, provide this note's hours.
    - Privacy Group: Choose which privacy group gets this message.
    - Note Tags: Categorize the message using categories like Assessment, Service, Referral.
    - Note Text: Summarize relevant facts, observations, and actions in the note.

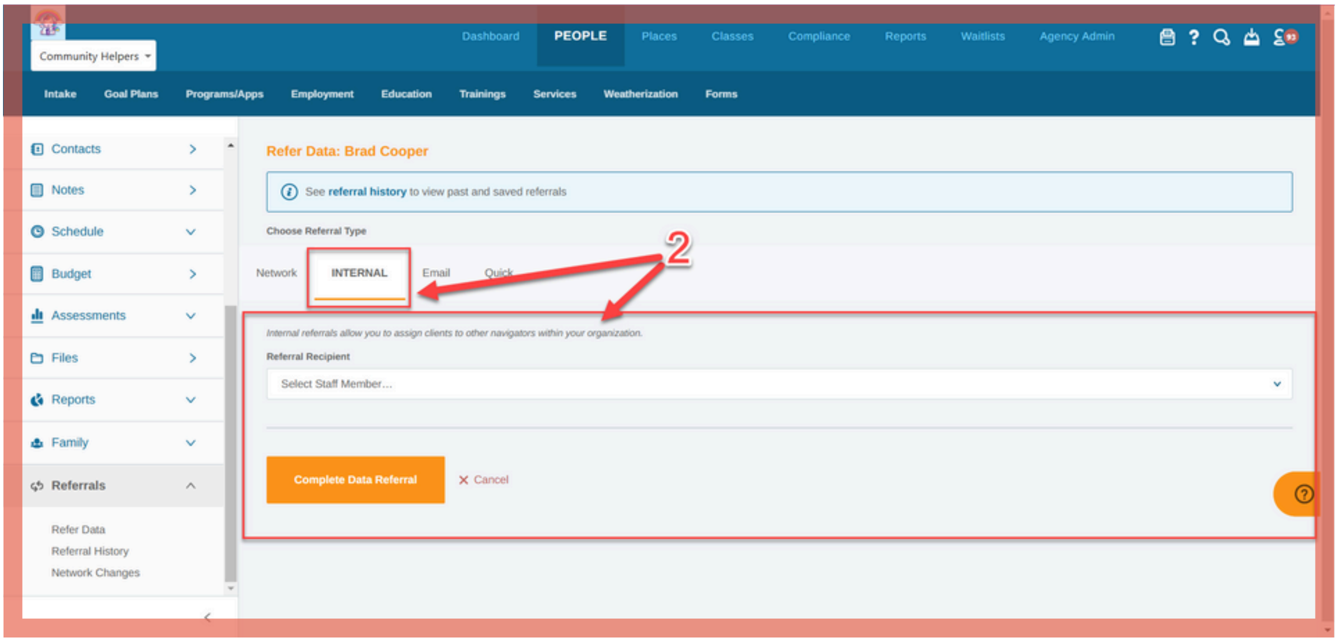


5. After filling in the necessary fields, click Add Note to save it in the client's profile.

SENDING REFERRALS

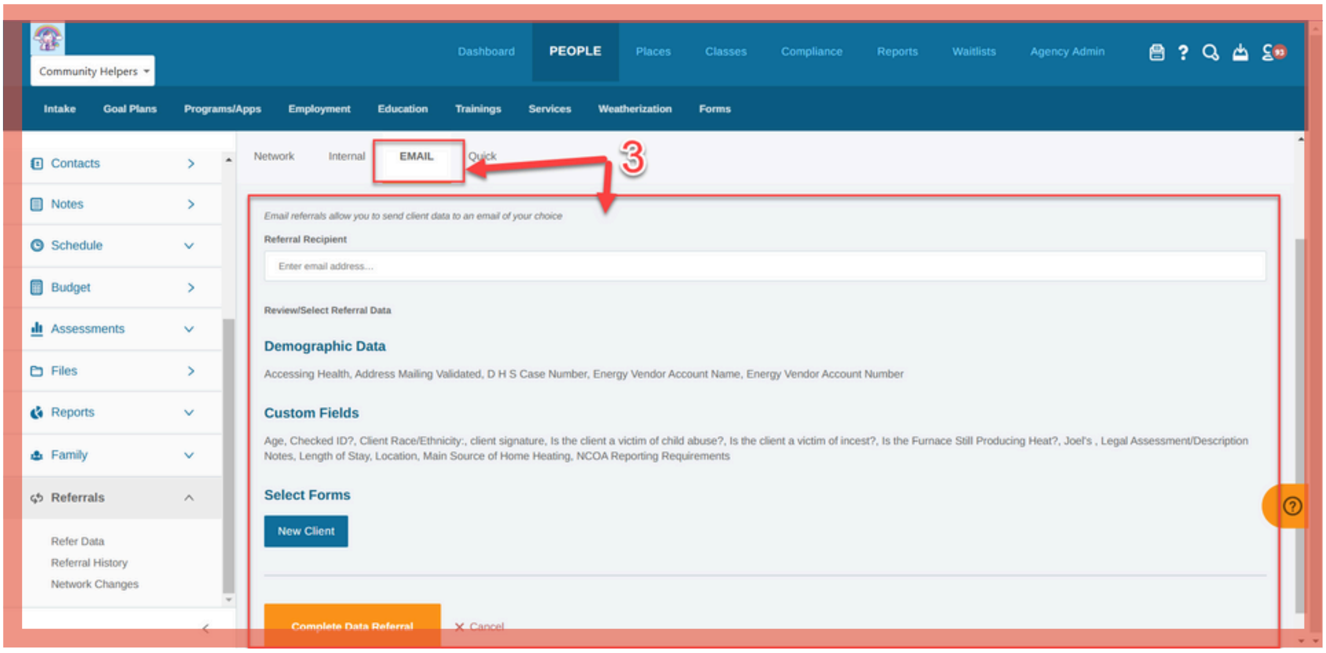


1. Click the Referrals Tab and then Refer Data in the left-hand navigation bar to manage client referrals.
    - This section allows you to send client data as referrals within CommUnify or to external agencies.
    - Here, you can choose to send referrals internally to staff within CommUnify or track referrals made to external organizations.



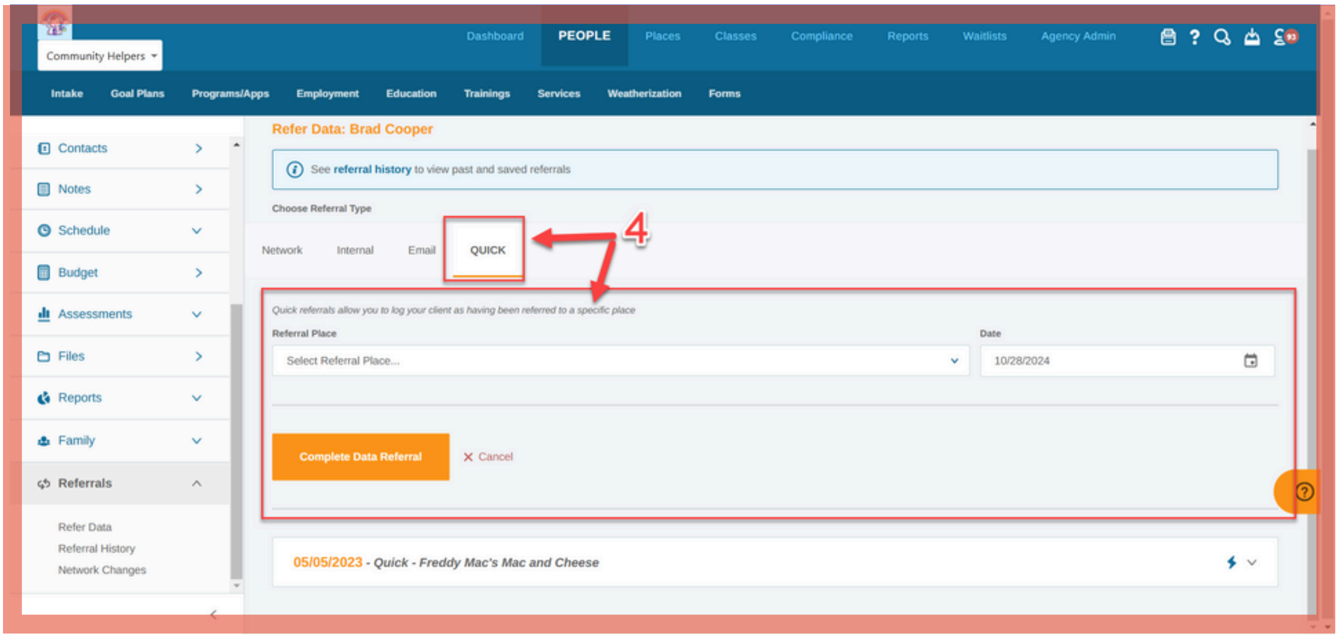
2. To send an internal referral, locate the staff member to whom you want to send the referral.

- In the Referral Recipient section, select the staff member’s name from the dropdown list.
- Complete any additional required fields and click Complete Data Referral to send the internal referral.



3. If you are referring the client to an external person or agency, you can send the referral via email.

- In the Referral Recipient section, input the email address of the person you wish to send the referral to.
- Once the email address is entered, click Complete Data Referral to send the referral.



4. You can log a quick referral by selecting the Referral Place (destination of the referral) and the Date of the referral.

- Once the referral destination and date are logged, click Complete Data Referral to save the quick referral in the system.

5. Viewing Referral History:

- Click the Referral History tab to review all previous referrals for the client.

PRESCREEN TOOL

1. Access the Prescreening Tab:

- In the client record, click Prescreening to begin the Universal Prescreening for CommUnify.

2. Starting a Prescreening:

- Search for the prescreening name or click Add Prescreen.
- Select CommUnify Universal Screening and click Assign Prescreen.

3. Completing the Prescreening:

- Click the ellipsis (three dots) to open and complete the prescreening.
- Answer all relevant questions. You may save your progress and return later if needed.

4.Submitting the Prescreening:

- When finished, click Complete Prescreen and confirm submission.
- View the recommendation in the window or note if none is given.
- Decide on the next action based on the recommendation.