

# PROVIDER PORTAL 2.0

## User Guide

*System Changes Effective January 6, 2018*

## INTRODUCTION

Welcome to the new and improved SHINES Provider Portal 2.0. The Provider Portal 2.0 (as referred to as Portal 2.0) increases the exchange of information between Providers and Division of Family and Children Services (DFCS). Provider Portal was re-designed with cutting-edge technology, including color scheme, new landing page, sleek design, and improved user interface – making the Portal 2.0 user friendly.

Georgia SHINES is the state's (Division) child welfare system of record, which means it is the primary case record repository and data system. All services delivered to children and families are documented in Georgia SHINES. Case documentation recorded in Portal 2.0 is readily accessible and available for review by DFCS case managers. This streamlines case documentation and reduces duplicate data entry. As agents of the Division, Providers play a key role in delivering case management services. The expansion of Portal 2.0 facilitates improved documentation of services.

This document highlights Portal 2.0 system changes, including:

- Page Descriptions
- Registering/Approving Users
- Logging onto Portal 2.0
- Case Documentation
  - Assigning Children
  - Documenting Contacts
  - Recording Education Events
  - Recording Health Events
  - Adding Medication
  - Viewing Legal Events
  - Uploading Documents
- Account Management – User
- Account Management – Administrator

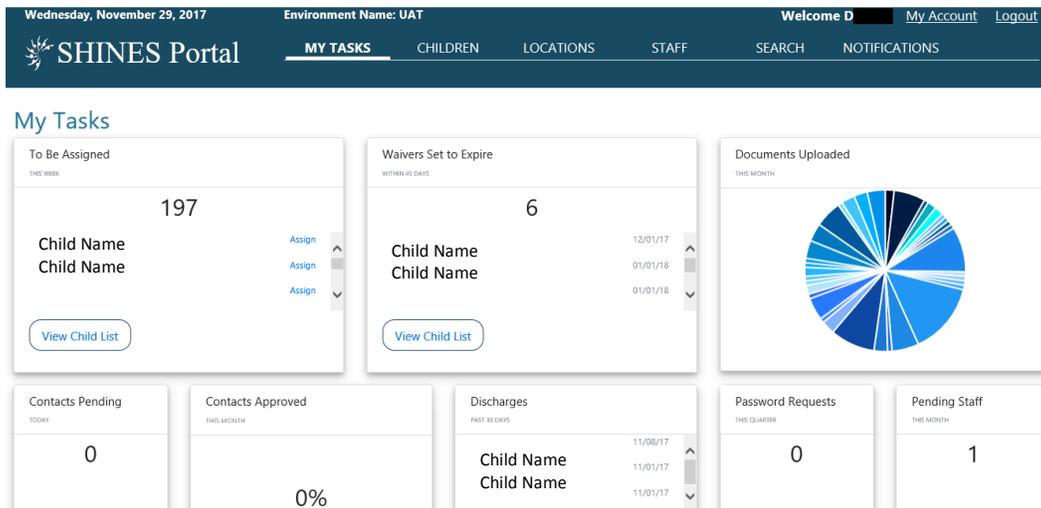
## TABLE OF CONTENTS

I. PAGE DESCRIPTIONS .....	3
II. REGISTERING – NEW PORTAL USER .....	8
III. APPROVING A NEW USER .....	11
IV. LOGGING ONTO PORTAL 2.0.....	11
V. ASSIGNING CHILDREN.....	12
VI. RECORDING CONTACT EVENTS.....	15
VII. RECORDING EDUCATION EVENTS.....	19
VIII. RECORDING HEALTH EVENTS.....	21
IX. VIEWING LEGAL EVENTS .....	25
X. UPLOADING DOCUMENTS .....	25
XI. ACCOUNT MANAGEMENT .....	27
XII. LOGGING OFF.....	32

## I. PAGE DESCRIPTIONS

### a. Landing Page

The Landing Page is the user dashboard. It contains a plethora of information at a glance. The Landing Page displays modules based on the user’s role in the Portal. This section provides an overview of each module. This view is for the Administrator Role.



#### ***To Be Assigned Module (Administrator/Supervisor Role)***

The To Be Assigned Module allows, Administrators and Supervisors to assign children to a specific Case Manager. A list of children who need to be assigned to a Case Manager or Supervisor will display in the ‘To Be Assigned’ Module.

#### ***Waivers Set to Expire Module***

The Waivers Set to Expire module displays a list of children and the expiration date of the RBWO waivers.

#### ***Documents Uploaded Module***

The Documents Uploaded module displays a pie chart with the area in which a document has been uploaded. By placing the mouse over a section of the pie, the document area (i.e., court, health/medical records, etc.) displays with the number of documents uploaded this month.

#### ***Contacts Pending Module***

The Contacts Pending module displays the number of contacts pending approval as of the current day by the Administrator or Supervisor.

#### ***Contacts Approved Module***

The Contacts Approved module displays the percentage of contacts that have been approved ‘this month’.

**Discharges Module**

The Discharges module displays a list of children who have been discharged from the agency within the last 30 days. The module also displays the discharge date.

**Password Reset Module (Administrator Role)**

This module displays the number of password resets the Administrator has received in the quarter. Please note this module may be replaced in the future.

**Pending Staff Module (Administrator Role)**

The Pending Staff module displays the number of staff member pending approval for portal access. This module only displays on the Administrator’s Landing Page.

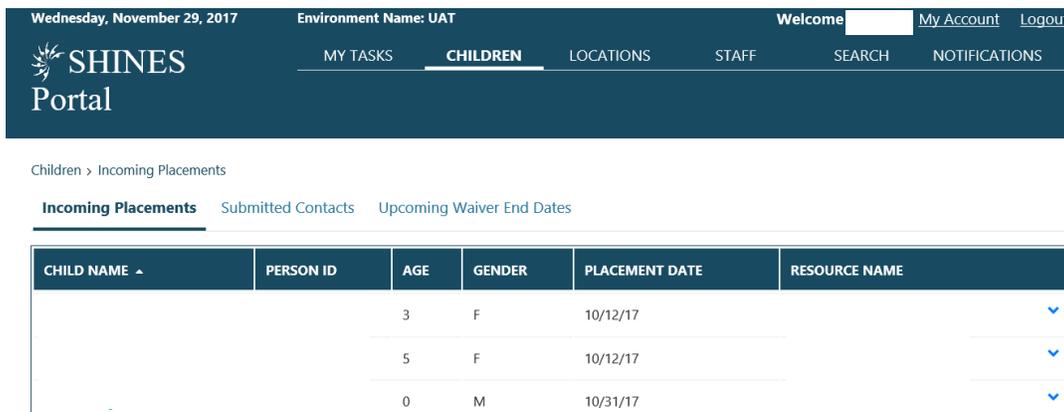
**b. Children Tab**

By clicking the ‘Children’ tab, the Child page displays. The view of the page is dependent on the role of the user, e. g. the page displays differently for Administrator and case Manager.



**Child Page (Administrator Role)**

The Administrator view displays the list of Incoming Placements (children to be assigned), Submitted Contacts, and Upcoming Waiver End Dates tabs.



**Child Page (Supervisor Role)**

The Child Page for the Supervisor displays three additional tabs, Incoming Placements, Submitted Contacts and Assigned Children. The Portal allows for users with the role of Supervisor to be assigned cases.

Children > Incoming Placements

**Incoming Placements** Submitted Contacts Assigned Children

CHILD NAME ▾	PERSON ID	AGE	GENDER	PLACEMENT DATE	RESOURCE NAME
--------------	-----------	-----	--------	----------------	---------------

### Child Page (Case Manager Role)

The Child Page for the Case Manager displays the children assigned to the case manager. This page is where the Case Manager will access the Child’s Case Details.

Children > Assigned Children

**Assigned Children**

CHILD'S NAME ▾	PERSON ID	RESOURCE NAME	PLACEMENT DATE	PROGRAM DESIGNATION	LAST CONTACT DATE
			10/12/17	Base WO	10/16/17 ▾

### c. Locations Tab

By clicking the ‘Locations’ tab, the Portal displays two subtabs, My Facilities/Agencies and Complete Homes List.

Wednesday, November 29, 2017
Environment Name: UAT
Welcome   [My Account](#) [Logout](#)

[MY TASKS](#)
[CHILDREN](#)
[LOCATIONS](#)
[STAFF](#)
[SEARCH](#)
[NOTIFICATIONS](#)

### My Facilities/Agencies

The My Facilities/Agencies subtab displays the Facilities/Agencies associated with the portal user. It provides a quantitative number of children placed within each agency as well as the current status of the agency.

Wednesday, November 29, 2017
Environment Name: UAT
Welcome   [My Account](#) [Logout](#)

[MY TASKS](#)
[CHILDREN](#)
[LOCATIONS](#)
[STAFF](#)
[SEARCH](#)
[NOTIFICATIONS](#)

Locations > My Facilities/Agencies

**My Facilities/Agencies**

Homes List

	<b>Children Placed: 249</b>	<b>Status: Active</b> ▾
	<b>Children Placed: 10</b>	<b>Status: Active</b> ▾
	<b>Children Placed: 0</b>	<b>Status: Active</b> ▾

### Complete Homes List

The Complete Homes List subtab displays the list of homes approved by the associated agencies. It also provides a high-level overview of the home status, children placed and contact information.

RESOURCE NAME	RESOURCE ID	STATUS	CHILDREN PLACED	PHONE	ADDRESS
Family Name	123	Active	1		LAWRENCEVILLE, Georgia, 30044-0006

### d. Staff Tab

The Staff Tab only displays for the Administrator Role. By clicking the 'Staff' tab, three additional subtabs display: Active Staff, Inactive Staff and Pending Staff.

### Active Staff

The Active Staff List provides a high-level overview for each staff member associated with the agencies. Clicking on the 'View Profile' tab displays the User's profile. Clicking on the 'View Cases' tab displays the list of children assigned to user.

NAME	START DATE	CURRENT CASES	LOCATION(S)	RESOURCE ID	PROFILE	CASES
Worker Name	12/01/15	0		8	<a href="#">View Profile</a>	<a href="#">View Cases</a>
Worker Name	07/24/17	0		16	<a href="#">View Profile</a>	<a href="#">View Cases</a>

### Inactive Staff List

This page displays a historical list of all staff members associated with the agency.

Wednesday, November 29, 2017 Environment Name: UAT Welcome [User] My Account Logout

SHINES Portal MY TASKS CHILDREN LOCATIONS **STAFF** SEARCH NOTIFICATIONS

Staff > Inactive Staff List

Active Staff List **Inactive Staff List** Pending Staff List

NAME ^	START DATE	INACTIVE DATE	LOCATION(S)	RESOURCE ID
	02/17/10	02/28/17		81
	10/01/15	02/28/17		11
	12/01/15	06/02/17		85
	10/01/15	06/02/17		16

### Pending Staff List

The Pending Staff List page displays a list of agency staff members who requested access to the Provider Portal. It is under this tab, where the Administrator will approve or reject request access to the Portal.

Wednesday, November 29, 2017 Environment Name: UAT Welcome [User] My Account Logout

SHINES Portal MY TASKS CHILDREN LOCATIONS **STAFF** SEARCH NOTIFICATIONS

Staff > Pending Staff List

Active Staff List Inactive Staff List **Pending Staff List**

NAME ^	USER TYPE	LOCATION(S)	RESOURCE ID	PROFILE	APPROVE	REJECT
	Placement Provider User			<a href="#">View Profile</a>	<a href="#">Approve Request</a>	<a href="#">Reject Request</a>
	Placement Provider Supervisor			<a href="#">View Profile</a>	<a href="#">Approve Request</a>	<a href="#">Reject Request</a>

Showing 1 to 2 of 2 entries.

### e. Search Tab

By clicking on 'Search', the portal displays a page that will allow users to search by a child's name or person ID number.

Wednesday, November 29, 2017 [User] Welcome [User] My Account Logout

SHINES Portal MY TASKS CHILDREN LOCATIONS STAFF **SEARCH** NOTIFICATIONS

Search By:

### f. Notifications Tab

By clicking 'Notifications', the portal displays two additional subtabs: Contact Activity and Case Management.

## Contact Activity

The Contact Activity provides a list of children in which the ECEM visit has not been completed and the number of days before the ECEM visit is due. Users can navigate to the child's Case Detail page from the Contact Activity tab.

Wednesday, November 29, 2017

Welcome Tester! [My Account](#) [Logout](#)

SHINES Portal

MY TASKS CHILDREN LOCATIONS SEARCH **NOTIFICATIONS**

Notifications > Contact Activity

**Contact Activity** Case Management

**ECEM-qualifying visit has not yet been made this month.**

Child Name: ,

Due in: 1 day

Case ID: 1;

[View Case](#)

## Case Management

Case Management displays a list of tasks and alerts as it pertains to each assigned child. Users can navigate to the child's Case Detail page from the Case Management tab.

Wednesday, November 29, 2017

Environment Name: UAT

Welcome Tester! [My Account](#) [Logout](#)

SHINES Portal

MY TASKS CHILDREN LOCATIONS SEARCH **NOTIFICATIONS**

Notifications > Case Management

Contact Activity **Case Management**

**No Medical Screen can be found for the child.**

Child Name:

Case ID:

[View Case](#)

**No Dental Screen can be found for the child. Note that Dental Screens are not required for children under 3.**

Child Name:

Case ID:

[View Case](#)

**No Developmental Assessment can be found for the child. Note that Developmental Assessments may not be required for children over 3.**

Child Name:

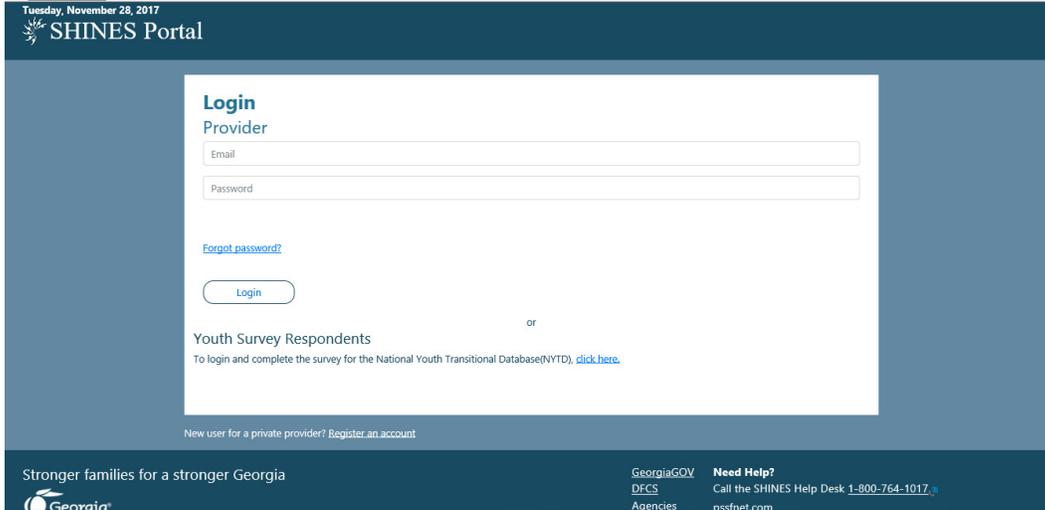
Case ID:

[View Case](#)

You have 44 days to change your password

## II. REGISTERING – NEW PORTAL USER

In internet browser, enter <https://shines.dhs.ga.gov:8443/#/login>. It is recommended that users bookmark site for future reference.



STEP	ACTION/TASK
1	Click on the 'Register an account' hyperlink at the bottom of the Login Page

Login > Registration

All fields are required unless otherwise indicated.

Basic Information

\*First Name:  Middle Initial:  Optional \*Last Name:

\*Position Title:

\*Work Email:  \*Re-enter Work Email:

\*Phone:  (555) 555-5555 Ext:  Optional

\*Office Address Line 1:  Office Address Line 2:  Optional

\*Office Address City:  \*State:  Georgia \*Zip Code:  Optional \*County:  Select

### Access Request

**\*Request Type (Regular access is manager)**  
 Placement Provider User

**Please note:** If you work for multiple resources under an umbrella organization, you need to submit a registration for access to one resource first. The administration will then be able to link you to multiple resources.

**\*Enter Your Agency/Facility Name**  
 Enter Your Agency/Facility Name

---

### Set Password

**\*Enter Password**

**\*Re-enter Password**

Password should be at least 8 characters with a mix of letters, numbers and can include special characters.

---

### Select Security Questions

**\*Question 1:** Select  **\*Question 1 Answer:**

**\*Question 2:** Select  **\*Question 2 Answer:**

**\*Question 3:** Select  **\*Question 3 Answer:**

---

### Terms and Conditions

By clicking on the checkbox below, I agree to abide by all state and federal laws, rules and regulations, and DHS policies and procedures regarding confidentiality of an individual's record. These citations include, but are not limited to, O.C.G.A. Sections 49-4-14, 49-5-40, 49-5-41, 50-18-72, and 45 CFR 205.5. I understand that all records concerning children placed in the custody of the Department of Human Services or all individuals who are the subject of or

STEP	ACTION/TASK
2	Complete all field identified with a red asterisk (*)
3	Scroll down and read the Terms and Conditions
4	Check the checkbox to accept the Terms and Conditions
5	Click the Submit button
6	<p>User will receive a confirmation email at the registered email                      From: Shines Portal [<a href="mailto:shinesportal@dhs.ga.gov">mailto:shinesportal@dhs.ga.gov</a>]                      Sent: Tuesday, November 28, 2017 7:45 PM                      To:                      Subject: Thank you for Registering</p> <p>Thank you for registering to the SHINES Portal. You will receive an email upon approval/disapproval by your administrator.</p>

### III. APPROVING A NEW USER

Portal Users with the ‘Administrator’ role approve or deny all requests for access to the Portal.

Staff > Pending Staff List

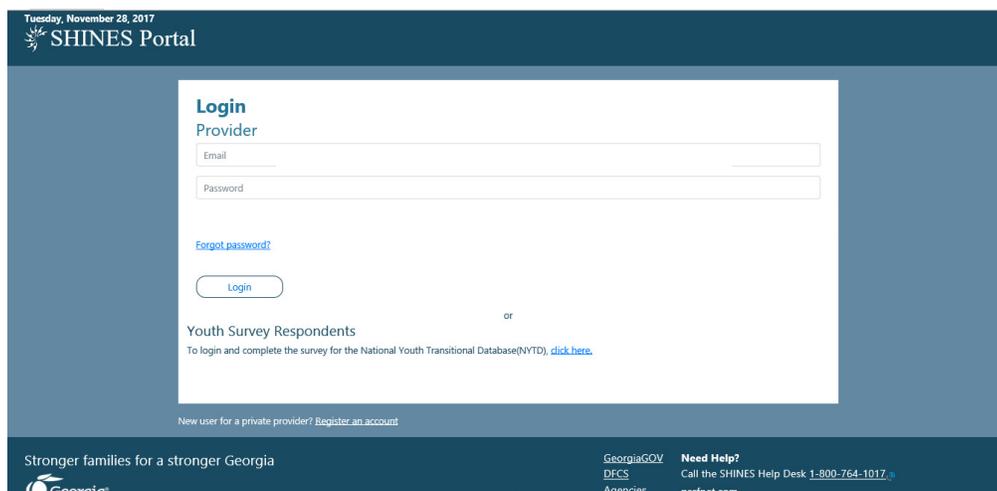
Active Staff List   Inactive Staff List   **Pending Staff List**

NAME ^	USER TYPE	LOCATION(S)	RESOURCE ID	PROFILE	APPROVE	REJECT
Tester, Provider	Placement Provider User			<a href="#">View Profile</a>	<a href="#">Approve Request</a>	<a href="#">Reject Request</a>

STEP	ACTION/TASK
1	Log in to the Portal
2	Click the Staff tab
3	Click on Pending Staff List
4	Select the appropriate Approve or Reject Request button

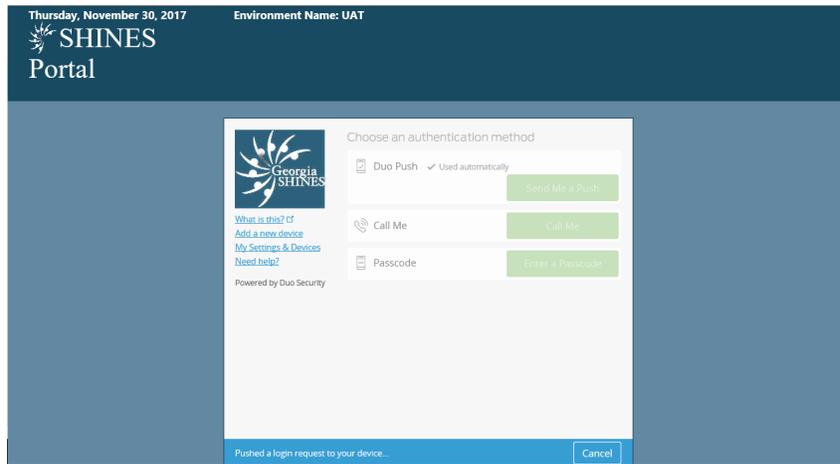
### IV. LOGGING ONTO PORTAL 2.0

In internet browser, enter <https://shines.dhs.ga.gov:8443/#/login>. It is recommended to bookmark this site for future reference.



STEP	ACTION/TASK
1	Enter your agency email address in the ‘Email’ field

STEP	ACTION/TASK
2	Enter your password in the 'Password' field
3	Click Login
4	Read the Confidentiality statement and click 'Ok'



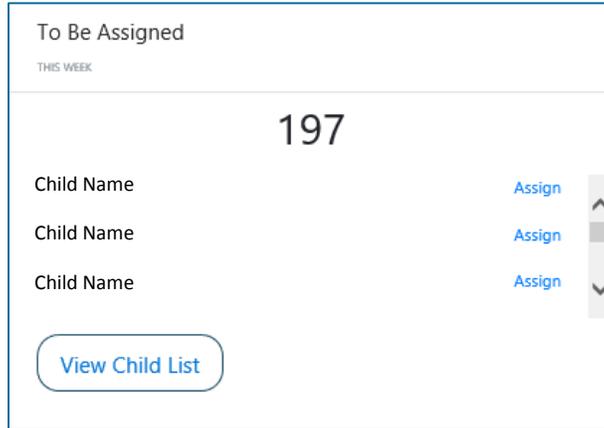
The DUO authentication box displays. If user set up DUO account to send a DUO Push to phone automatically, open the DUO app or tap the notification on cell phone and tap 'Approve.' If user selected any other authentication method, follow the on-screen instructions.

**All users will have to authenticate their access each time they log into the Portal.** Upon successful authentication, the role specific Landing Page displays.

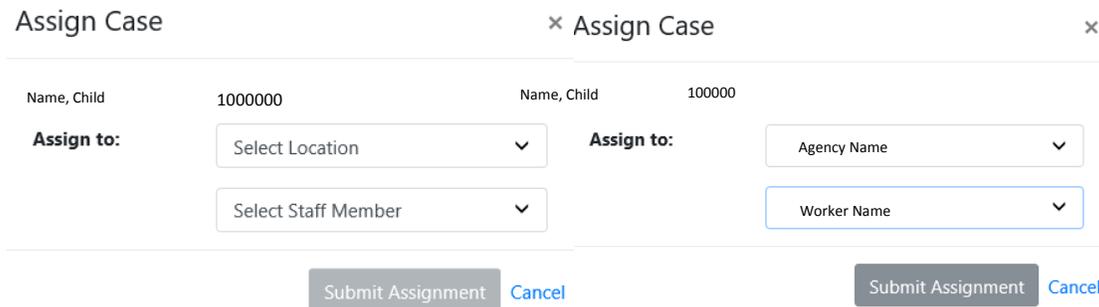
## V. ASSIGNING CHILDREN

The To Be Assigned module allows Administrators and Supervisors to assign children to a specific Case Manager. A list of children who need to be assigned to a Case Manager or Supervisor will display in the To Be Assigned module.

### ***Assigning a child***



STEP	ACTION/TASK
1	Click on the Assign hyperlink
2	Click the Select Location dropdown and select the agency
3	Click the Select Staff Member dropdown and select the worker
4	Click Submit Assignment



Once the child has been assigned to the Case Manager or Supervisor, the child’s name will no longer display in the To be Assigned module.

**View Children/Child Information**

Supervisors and Administrators can review a quick summary of the child’s case details under the Incoming Placements tab. Case Managers do not have the Incoming Placements tab.

Children > Incoming Placements

**Incoming Placements** [Submitted Contacts](#) [Upcoming Waiver End Dates](#)

CHILD NAME ^	PERSON ID	AGE	GENDER	PLACEMENT DATE	RESOURCE NAME
AI	18	5	F	10/12/17	

**Case Details**

Case ID: 1  
 Language:  
 Sibling Placement: No  
 DFCS Case Manager:  
 DFCS Supervisor: E  
 Program Designation: Base WO  
 Waiver End Date:  
 Basic Rate:  
 Waiver Rate: \$0.00

**Education**

Currently Enrolled: Yes  
 IEP: No  
**Legal**  
 Scheduled Court Date:  
 Court Order:

**Health**

Medicaid:  
 Last Physical:  
 Last Dental:  
 Last Eye Exam:  
 Physical/Mental/Developmental Issues: No

For Case Managers, the Assigned Children tab displays under the Children tab. Workers will access the child’s case details, enter contacts and document health and educational information, as well as upload documents from the Children tab.

STEP	ACTION/TASK
1	Click on the Children tab
2	Click on the expansion arrow at the end of the row of the child you would like more information

Children > Assigned Children

**Assigned Children**

CHILD'S NAME ^	PERSON ID	RESOURCE NAME	PLACEMENT DATE	PROGRAM DESIGNATION	LAST CONTACT DATE
			10/12/17	Base WO	10/16/17

STEP	ACTION/TASK
1	Click on the child’s name hyperlink
2	The Case Details page displays

The Case Detail page provides an at a glance view of the child’s information. Case Details includes five (5) expandable sections: Child Demographics & Characteristics, Current Placement, Case Management, Case Documents and Placement History.

Children > Child Name > Case Details

**Case Details** | Contacts | Education | Health | Legal | Documents

**Child Demographics & Characteristics**

First Name: Child      Date of Birth:      Case ID:  
 Middle Name:      Age: 3      SSN  
 Last Name:      Gender: Female      Birth Certificate: No  
 Person ID:      Language: English      Medicaid:  
 Other:

**Current Placement**

Resource Name:      Legal County: Hall      Program Designation: Base WO  
 Resource ID:      Date of Last Placement:      RBWO Waiver End Date:  
 Placement Date: 10/12/17  
 Sibling Placement: No

**Case Management**

Assigned To:      DFCS Case Manager:      DFCS Supervisor:  
 Title: Social Services Case Manager      Title: Social Services Supervisor  
 Phone:      Phone:  
 Email:      Email:  
 Location      Location

**Case Documents**

**Placement History**

## VI. RECORDING CONTACT EVENTS

The next tab is the Contacts tab. This is where workers will enter all contacts with the child. The Contacts tab is divided into four expandable sections: Incomplete Contacts (Narrative Required), Editable Contacts, Contact Log and Contact Search.

### Adding a Contact

Children > Contacts

Case Details | **Contacts** | Education | Health | Legal | Documents

CONTACTS IN DRAFT: 0      EDITABLE CONTACTS: 0      [Add Contact](#)

**Incomplete Contacts (Narrative Required)**

TIME REMAINING TO COMPLETE	METHOD	PURPOSE	PERSON CONTACTED	CONTACT DATE
Loading data...				

Showing 0 to 0 of 0 entries.

STEP	ACTION/TASK
1	Click on the Contacts hyperlink
2	Click the 'Add Contact' button (top right side of page)
3	Select the 'Method' of Contact from the Method dropdown
4	Enter the 'Contact Date'
5	Enter the 'Contact Time'
6	Select a 'Location' from the Location dropdown

7	If applicable, enter 'Others Contacted'
8	Select the 'Purpose'. Multiple Purposes can be selected in the dropdown box
9	Select the Principal/Collateral Contacted, Discussed/In Reference To/Private Conversation
10	Select the 'Narrative Type' from the Narrative Type dropdown
11	Click Save and Finish Later
12	Click 'Continue to Narrative' button
13	Enter Narrative on the Narrative template
14	Click the 'Save' icon on the 'Narrative' template and close out the template
15	Click 'Save and Finish Later' on the Contact Detail page

### Editing a Contact

Contacts entered in the Portal are editable for 72 hours. The Time Remaining to Complete/Edit counts down the 72 hours from the time the contact was entered. Contacts that have not been submitted for approval within the 72-hour timeframe will be deleted from the system and will have to be re-entered.

Contacts can be saved with or without a narrative. Contacts saved without a narrative are saved under the 'Incomplete Narrative' section. Contacts saved with a narrative, but not submitted for approval display in the 'Editable Contacts' section.

CONTACTS IN DRAFT: 1
EDITABLE CONTACTS: 0
CONTACTS FOR REVIEW: 0
RECENTLY APPROVED CONTACTS: 0

[Add Contact](#)

**Incomplete Contacts (Narrative Required)** ^

TIME REMAINING TO COMPLETE	METHOD	PURPOSE	PERSON CONTACTED	CONTACT DATE
71hrs.59mins.	<a href="#" style="color: #007bff; text-decoration: none;">Announced Face to Face</a>	Case Manager Child Visit Case Planning		12/01/17

STEP	ACTION/TASK
1	Click on the blue 'Method' hyperlink (ex. Announced Face to Face); user is navigated to the Contact Detail page.

**Contact Details 12/01/17**

Child Name: \_\_\_\_\_ Person ID: \_\_\_\_\_

[Edit Contact](#)

Contact Information

STEP	ACTION/TASK
2	Click on the 'Edit Contact' button
3	The Contact Details page displays. Click on the 'Continue to Narrative' button at the bottom of the page
4	Complete the narrative form following the instructions in the 'Adding a Contact' section of this guide
5	Click the 'Save and Finish Later' button

**Narrative Type**

Safety, Permanency and Wellbeing ▼

[Continue to Narrative](#)

You have **71 hours** to submit this contact

[Save and Finish Later](#)

### ***Submitting a Contact for Approval***

Contacts must be approved by the Supervisor or Administrator before the contact displays in SHINES. Once the narrative has been saved and the 'Save and Finish Later' button is clicked, users are able to send the contact for approval. The Supervisor or Administrator will have whatever time is remaining from the original 72 hours started by the Case Manager to approve the contact.

You have **71 hours** to submit this contact

[Save and Finish Later](#)

**\*Assign To:** Select ▼ [Submit](#)

STEP	ACTION/TASK
1	Click the 'Assign To' dropdown field and select the appropriate Supervisor or Administrator

STEP	ACTION/TASK
2	Click the 'Submit' button

### Approving a Contact

Supervisors and Administrators must approve all contacts entered in the Provider Portal. Contacts submitted for approval are located under the 'Children' tab.

Incoming Placements **Submitted Contacts** Upcoming Waiver End Dates

CONTACTS FOR REVIEW: 2 RECENTLY APPROVED CONTACTS: 0

Contacts for Review

TIME REMAINING TO EDIT	METHOD	PURPOSE	PERSON CONTACTED	LAST UPDATED	SUBMITTED TO
71hrs.23mins.	<a href="#">Announced Face to Face</a>	Case Manager Child Visit Case Planning		12/02/17	ELISER,Dajari

STEP	ACTION/TASK
1	Click on the 'Children' tab
2	Click on the 'Submitted Contacts' tab
3	Click on the blue 'Method' hyperlink; Contact Details page displays

Contact Details 12/01/17

Child Name: Person ID:

[Edit Contact](#) [Add Comment](#) [Approve Contact](#)

Clicking the 'Edit Contact' button displays the 'Contact Details' page modifiable. Clicking the 'Add Comment' button navigates the user to the Supervisor Comments box at the bottom of the 'Contact Detail' page. Clicking the 'Approve Contact' button allows the Supervisor or Administrator to approve the contact.

[View Narrative](#)

Supervisor Comments

This is a test comment.

[Save](#) [Cancel](#)

STEP	ACTION/TASK
1	Click the 'View Narrative' button. A non-modifiable narrative form displays for review
2	Close the narrative form

STEP	ACTION/TASK
3	Click the 'Approve Contact' button

Once the contact is approved, **Approved** will display on the Contact detail page.

## VII. RECORDING EDUCATION EVENTS

The Education tab contains three sections: Education Summary, Education Log and Education Documents. The Education Summary provides an at-a-glance of the child’s education. The Education Log is where the child’s school enrollment and withdrawal is entered. The Education Documents displays any education documents uploaded in the portal.

Portal users can add a school record when a child is not enrolled or has been withdrawn from a school. If a child is enrolled in school, but is transferring because of the placement with the agency/facility, the Provider should contact the child’s DFCS worker to enter the withdrawal date in Georgia SHINES.

### **Adding a School Enrollment**

STEP	ACTION/TASK
1	Click the Children tab
2	Click the Education tab
3	Click 'Add School'

**Add School**
X

**Category**

School
▼

**Enrollment Date**

mm/dd/yyyy
📅 TODAY

**School Name**

**Grade**

Select
▼

Select Resource

STEP	ACTION/TASK
4	Select the 'Category' (Daycare, Head Start, Home School, Not in School, School)
5	Enter the Enrollment Date
6	Enter the School Name
7	Click 'Select Resource'
8	Select the radio button next to the correct school
9	Click 'Continue'
10	Enter the 'Grade'
11	Click 'Save'

If the Provider has entered a school record, the school recorded can be amended to enter the 'Withdrawal Date'.

***Adding a Withdrawal Date***

Education Log
^

ENROLLED DATE ▼	SCHOOL NAME	GRADE	GRADE COMPLETED	WITHDRAWAL DATE	ENTERED BY
09/12/17	North Clayton Middle School	6			

STEP	ACTION/TASK
1	Click the Children tab
2	Click the Education tab
3	Click the School Name hyperlink

**Add School**
X

<b>Category</b>	<b>Enrollment Date</b>		
<b>School Name</b>	<b>Grade</b>		
<b>School Address Line 1</b>	<b>School Address Line 2</b>		
<b>City</b>	<b>State</b>	<b>Zipcode</b>	<b>County</b>
<b>Withdrawal Date</b>			

North Clayton Middle School	09/12/2017	6	5517 w. fayetteville rd.
1 MAIN ST	Georgia	30349	Clayton

Step	Task/Actions
4	Enter the Withdrawal Date
5	Click 'Save'

When a new school enrollment is added for the next grade level, the Portal will automatically enter the 'Grade Completed' for the previous entry.

## VIII. RECORDING HEALTH EVENTS

The Health tab contains four sections: Health Summary, Health Visits, Medication and Health Documents. The Health Summary section provides an at a glance view of the child's medical appointments, diagnosis and medications. The Health Visits section is where all health appointments will be entered. The Medications section is where all medications the child is taken is recorded. The Health Documents section is where uploaded health documents will display.

### ***Adding a Health Visit***

Case Details
Contacts
Education
Health
Legal
Documents

NEXT MEDICAL APPOINTMENT DUE:
NEXT DENTAL APPOINTMENT DUE:

Health Summary
^

Medicaid ID:	Current Diagnosis:
Last Annual Medical Appointment:	Current Medications:
Last 6 Month Dental Appointment:	

Health Visits
^

Timeframe: This Month v

DATE	STATUS	DESCRIPTION	ENTERED BY
No records exist			

Showing 0 to 0 of 0 entries.

STEP	ACTION/TASK
1	Click on the Children tab
2	Click on the child's name hyperlink
3	Click the Health tab
4	Click 'Add Visit' button in the Health Visits section

The screenshot shows the 'Add Visit' form with the following fields and options:

- Health Visit Type:** Dental (dropdown)
- Visit Date:** mm/dd/yyyy (calendar icon)
- Reason for visit:** Select (dropdown)
- Secondary Reason:** Select (dropdown)
- List of Observed Symptoms/Concerns that led to the visit:** Text input field
- Medical Professional:** Text input field
- Is this a follow-up visit or the result of a referral from a previous health visit?:** Select (dropdown)
- Visit Outcome:**
  - Follow-up Needed for Dental
  - Follow-up Needed for Developmental
  - Follow-up Needed for Medical
  - Follow-up Needed for Mental Health
  - Follow-up Needed for Other
  - Follow-up Needed for Vision
  - Follow-up Treatment with this Provider Needed
  - No Follow-up/Referral Needed
- Specialist Name and/or Specialty Type, if applicable:** Multiple text input fields
- Buttons:** Save, Cancel

STEP	ACTION/TASK
5	Select the appropriate 'Health Visit Type'
6	Enter the 'Visit Date'
7	Select the appropriate 'Reason for Visit'
8	Select the answer for the 'Is this a follow up visit or a referral from a previous health visit?' question
9	Mark the appropriate Visit Outcome
10	Click 'Save'

When 'Health/Physical/Developmental' or 'Mental/Emotional/Behavioral' is selected as the 'Health Visit Type', the 'Diagnosis' section will display.

### Adding a Diagnosis

The form contains the following elements:

- Diagnosis:** A dropdown menu with 'Select' as the placeholder.
- Diagnosed Date:** A text input field with the placeholder 'mm/dd/yyyy', a calendar icon, and a 'TODAY' button.
- Justification:** A dropdown menu with 'Select' as the placeholder.
- Buttons:** 'Save' and 'Cancel' buttons.

STEP	ACTION/TASK
1	Select the appropriate 'Diagnosis'
2	Enter the 'Diagnosed Date'
3	Select the appropriate 'Justification'
4	Click Save

### Adding Medication

The 'Medication' section displays a table with the following columns: MEDICATION NAME, FREQUENCY, REASON, ADMIN PERSON, START DATE, END DATE, and COMMENTS. The table is currently empty, showing 'No records exist'. Below the table, there is a button labeled 'Add Medication'.

STEP	ACTION/TASK
1	Click on the Children tab
2	Click on the child's name hyperlink
3	Click the Health tab
4	Click 'Add Medication' in the Medication section

**Add Medication**
X

**\*Start Date**

**End Date**

**Admin Person**

**Reason**

**\*Medication Name**

**\*Medication Type**

**\*Dosage**

**\*Frequency**

**Allergy Description**

**Comments**

STEP	ACTION/TASK
5	Enter the 'Start Date'
6	Enter the Admin Person (The person who will administer the medication)
7	Enter the 'Reason' the medication is being taken
8	Enter the 'Medication Name'
9	Enter the 'Medication Type'
10	Enter the 'Dosage'
11	Select the 'Frequency'
12	Enter any known allergies
13	Click 'Save'

When 'Psychotropic' is selected as the 'Medication' type, a certification statement displays.

**\*Medication Name**

**\*Medication Type**

**\*Dosage**

**\*Frequency**

**Allergy Description**

**Comments**

I verify that I have prior authorization from the County Director regarding the usage of psychotropic drugs.

You must check the checkbox and upload the Prior Authorization form.

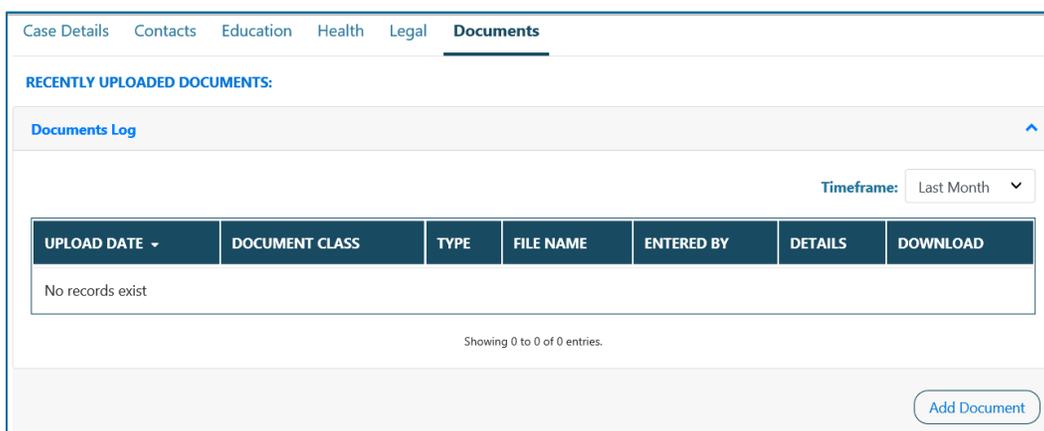
## IX. VIEWING LEGAL EVENTS

The Legal tab is for information purposes only. It contains two sections: Legal Summary and Legal Action Log. The Legal Summary section provides the Legal Status, Permanency Plan and Legal County of the child. The Legal Action Log contains a list of legal actions that have occurred on the child’s behalf entered by the case manager in Georgia SHINES.

## X. UPLOADING DOCUMENTS

The Documents tab is where all documents that are to become a part of the child’s record are uploaded.

### ***Adding a Document***



STEP	ACTION/TASK
1	Click on the Children tab
2	Click on the child’s name hyperlink
3	Click the Documents tab
4	Click ‘Add Document’ button

STEP	ACTION/TASK
5	Enter the 'Date Obtained'
6	Click Browse to find the file to upload
7	Once you've selected the file to upload, click 'Open' on the dialogue box
8	Select the 'Document Class'
9	Select the 'Document Type'
10	Enter any Details (such as a description of the item uploaded)
11	Click 'Upload'

When 'Health Data' is selected as the 'Document Class', documents uploaded will display in the Health Documents section under the Health tab.

UPLOAD DATE	DOCUMENT CLASS	TYPE	FILE NAME	ENTERED BY	DETAILS	DOWNLOAD
12/03/17	Health Information	Medical Log	f3a445a1b7e2972209	.	Test Upload	<a href="#">Download</a>

When 'Person Information' is selected as the 'Document Class', documents uploaded will display in the 'Education Documents' section under the 'Education' tab.

Education Documents						
UPLOAD DATE	DOCUMENT CLASS	TYPE	FILE NAME	ENTERED BY	DETAILS	DOWNLOAD
12/03/17	Person Information	School Records	5650a4785de62584		Test upload	<a href="#">Download</a>

All uploaded documents remained stored under the 'Documents' tab. When the 'Download' hyperlink displays in blue, the document can be downloaded. Documents uploaded by the DFCS case manager will be listed in the Documents section of the Education and Health tabs. These documents **are not** available for download.

## XI. ACCOUNT MANAGEMENT

### Accessing Account

Portal users manage their accounts through the 'My Accounts' hyperlink. From this section, portal users can change their Basic Information, Passwords and Security Questions.

Sunday, December 3, 2017
Welcome [My Account](#) [Logout](#)

MY TASKS   CHILDREN   LOCATIONS   STAFF   SEARCH   NOTIFICATIONS

### Account Profile

Basic Information Edit

<b>First Name:</b>	<b>Work Email:</b>	<b>Office Address Line 1:</b> 1 MAIN ST
<b>Middle Initial:</b>	<b>Phone:</b> (555) 555-5555	<b>Office Address Line 2:</b>
<b>Last Name:</b> ELISER	<b>Phone Ext:</b>	<b>City:</b> Atlantga
<b>Title:</b> RD SME		<b>Zip Code:</b> 30303
		<b>County:</b> Fulton
		<b>State:</b> Georgia

STEP	ACTION/TASK
1	Click on the 'My Account' hyperlink in the Portal Header
2	Click on the 'Edit' button in the 'Basic Information' section

STEP	ACTION/TASK
3	Make any necessary changes
4	Click 'Update Profile'

### Changing Password

Passwords must be changed every 45 days. Passwords can be reset under the 'My Account' section by all Portal users.

STEP	ACTION/TASK
1	Click 'Reset My Password'

STEP	ACTION/TASK
2	Enter new password in the 'Enter Password' field
3	Re-enter new password in the 'Re-enter Password' field
4	Click 'Change My Password'

### Changing Security Questions

Security questions must be different and distinct. When changing the security questions, users must select three different questions.

Security Questions [Choose New Questions](#)

---

**Question 1:** What was your childhood nickname?

**Question 2:** What is the name of your favorite childhood friend?

**Question 3:** What is the name of the street you lived on in third grade?

STEP	ACTION/TASK
1	Click 'Choose New Questions'

Security Questions

**\*Question 1:**

**\*Question 2:**

**\*Question 3:**

**\*Question 1 Answer:**

**\*Question 2 Answer:**

**\*Question 3 Answer:**

Update My Questions
Cancel

STEP	ACTION/TASK
2	Select new questions
3	Enter the answers for the new questions
4	Click 'Update My Questions'

### ***Account Management-Administrator Role***

Agency staff members with the role of Administrator can manage some aspects of a user's account. Agency Administrators can change the account type, deactivate accounts, add a new vendor and send a reset password email.

There are three account types: Placement Provider User, Placement Provider Supervisor and Placement Provider Administrator. The Placement Provider User role is for staff members who have direct contact with children. The Placement Provider Supervisor role is for staff who supervisor those with direct contact with children, but who can also have direct contact. The Placement Provider Administrator role is for staff members who have executive oversight within the agency such as Executive Director, Program Director or CEO.

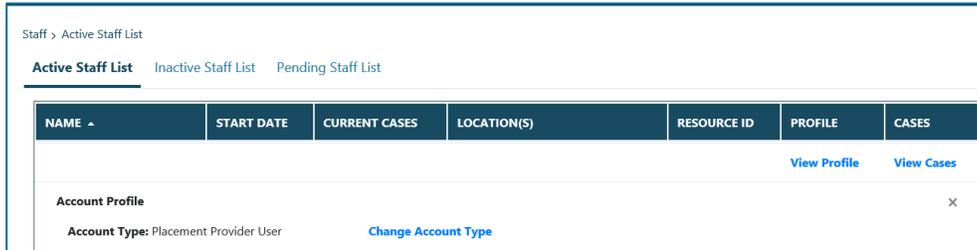
### ***Changing the Account Type***

Staff > Active Staff List

**Active Staff List** [Inactive Staff List](#) [Pending Staff List](#)

NAME ^	START DATE	CURRENT CASES	LOCATION(S)	RESOURCE ID	PROFILE	CASES
	12/01/15	0			<a href="#">View Profile</a>	<a href="#">View Cases</a>

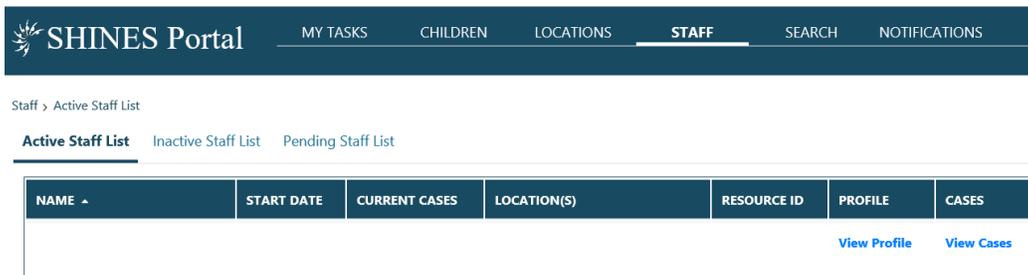
STEP	ACTION/TASK
1	Click on the Staff tab
2	Click on 'View Profile'



STEP	ACTION/TASK
3	Click 'Change Account Type'
4	Select the new account type
5	Click 'Save'

### Deactivating an Account

Administrators can deactivate accounts from the 'Associated Locations' section. Accounts should be deactivated when an employee has been terminated.



STEP	ACTION/TASK
1	Click on the 'Staff' tab
2	Click on 'View Profile' hyperlink of the staff person to be deactivated

Associated Locations

Location	Resource ID	Type	Status	Start Date	Actions
					Deactivate
					Deactivate

STEP	ACTION/TASK
3	Click 'Deactivate' for the agency or agencies
4	Enter the 'Inactive Date'
5	Click 'Save'

**Adding a New Vendor**

When a user needs to be linked to more than one location, the Administrator can link them under Associated New Vendors section. Users should only be linked to the agency or agencies that the Administrator is linked to.

Associated New Vendors

\*New Vendor List \*Start Date

TODAY

Add

STEP	ACTION/TASK
1	Click the 'Staff' tab
2	Click 'View Profile' for the staff member who needs to be linked to another agency/facility
3	In the 'Associated New Vendors' section, select the agency/facility from the 'New Vendor List' dropdown
4	Enter the 'Start Date'
5	Click Add

Once the staff member has been linked to the new agency/facility, the agency will display in the 'Associated Vendors' list.

## XII. Logging Off

Once you have completed your work in Portal 2.0, click the 'Logout' button in the top left corner and close your web browser.