# 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
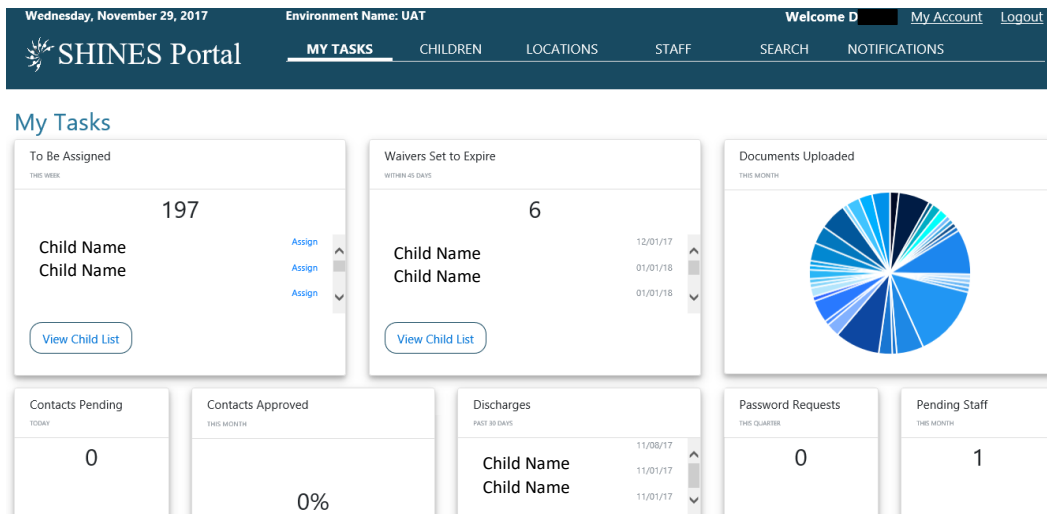- Account Management – Administrator

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# 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.
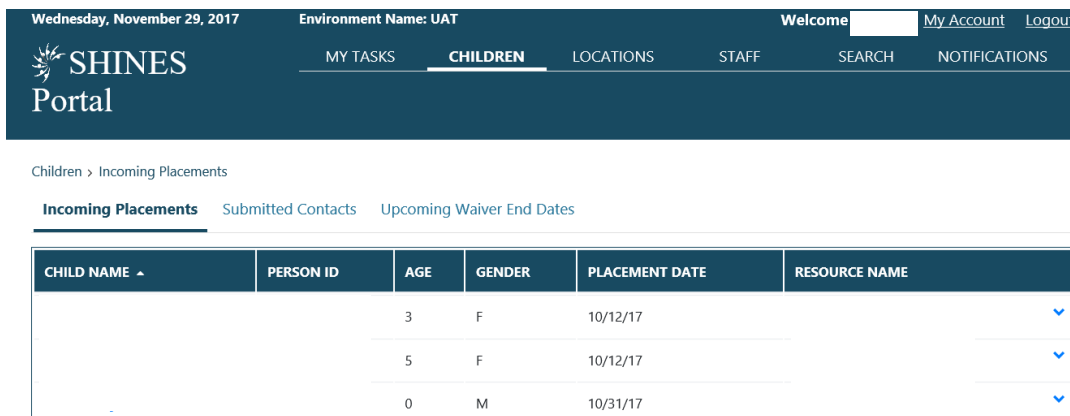
### b. Children Tab

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 |
|---|---|---|---|---|
| ☀ SHINES Portal | 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 |
|---|---|---|---|
| ☀ SHINES Portal | MY TASKS   CHILDREN   **LOCATIONS**   STAFF   SEARCH   NOTIFICATIONS | | |

Locations > My Facilities/Agencies

**My Facilities/Agencies**        Homes List

| | **Children Placed: 249** | **Status: Active** | ⌄ |
|---|---|---|---|
| | **Children Placed: 10** | **Status: Active** | ⌄ |
| | **Children Placed: 0** | **Status: Active** | ⌄ |

*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.



### 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.



*Inactive Staff List*

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

### 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.



### 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.



### 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.



### *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.



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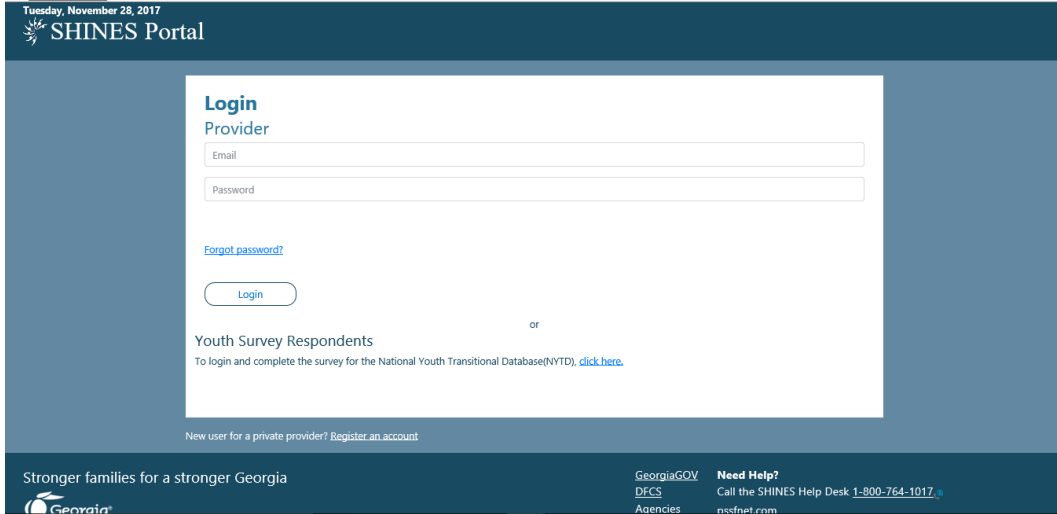
| STEP | ACTION/TASK |
|------|-------------|
| 1 | Click on the 'Register an account' hyperlink at the bottom of the Login Page |

## Access Request

**\*Request Type (Regular access is manager)**

Placement Provider User ▾

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

Enter Your Agency/Facility Name 🔍

**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.

## 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

Submit

| STEP | ACTION/TASK |
|------|-------------|
| 2 | Complete all fields identified with a red asterisk (*) |
| 3 | Enter the Agency/Facility Name and click the search icon |
| 4 | Click the radio button next to the Agency/Facility Name |
| 5 | Click the Add Provider button |
| 6 | Scroll down and read the Terms and Conditions |
| 7 | Check the checkbox to accept the Terms and Conditions |
| 8 | Click the Submit button |
| 9 | User will receive a confirmation email at the registered email<br>From: Shines Portal [mailto:shinesportal@dhs.ga.gov]<br>Sent: Tuesday, November 28, 2017 7:45 PM<br>To:<br>Subject: Thank you for Registering<br><br>Thank you for registering to the SHINES Portal. You will receive an email upon approval/disapproval by your administrator. |

## 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 | | | View Profile | Approve Request | Reject Request |

| Steps | 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 |

**Reactivating A User**

Portal Users with the 'Administrator' role can reactivate users.

Staff › Inactive Staff List

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

| NAME ▲ | START DATE | INACTIVE DATE | LOCATION(S) | RESOURCE ID | ACTIONS |
|---|---|---|---|---|---|
| Staff member | 08/17/15 08/17/15 | 12/31/16 01/29/18 | | 11305220 11305220 | Reactivate |

| Steps | ACTION/TASK |
|---|---|
| 1 | Click on the Inactive Staff List |
| 2 | Click on the 'Reactivate' link for the staff member to be reactivated; the Associated Locations submodule will display |
| 3 | Click on the 'Reactivate' link for the location in which the staff member is returning |
| 4 | Enter the Start Date for the staff member |

| 5 | Click Save |
|---|---|

**Associated Locations**

| Location | Resource ID | Type | Status | Inactive Date | Actions |
|----------|-------------|------|--------|---------------|---------|
|  |  | Placement Provider Administrator | Inactive | 12/31/16 | *Start Date: <br> mm/dd 🗓 TODAY <br> Save |
|  |  | Placement Provider Administrator | Inactive | 01/29/18 | **Reactivate** |

# 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.
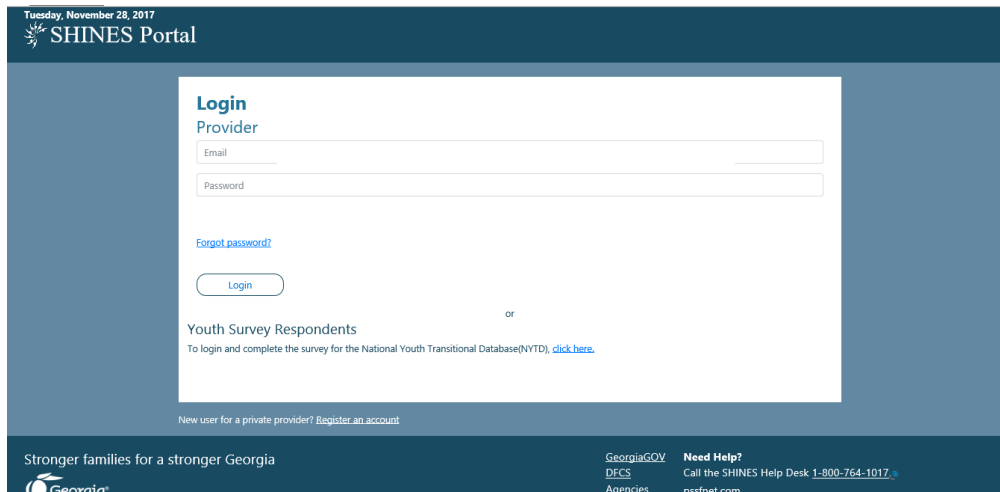


| STEP | ACTION/TASK |
|------|-------------|
| 1 | Enter your agency email address in the 'Email' field |
| 2 | Enter your password in the 'Password' field |
| 3 | Click Login |
| 4 | Read the Confidentiality statement and click 'Ok' |
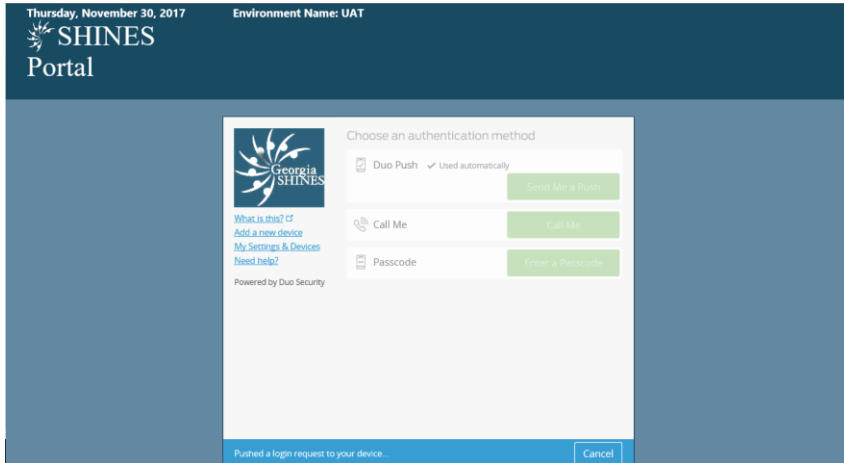
The DUO authentication box displays. If user set up DUO account to send a DUO Push to phone automatically, open the DUO app or tap the notification on cell phone and tap 'Approve.' If user selected any other authentication method, follow the on-screen instructions.

**All users will have to authenticate their access <u>each time</u> 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***
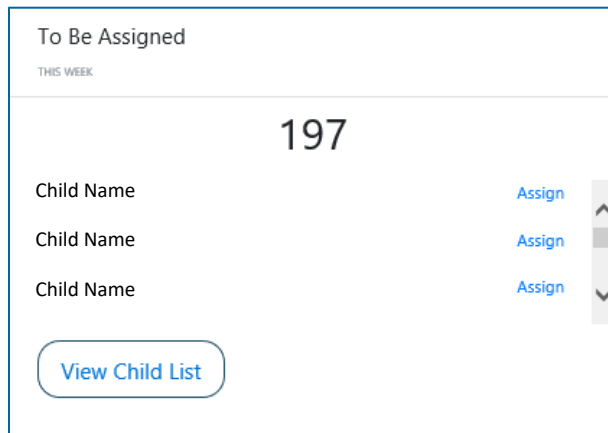


| STEP | ACTION/TASK |
|:---:|:---|
| 1 | Click on the Assign hyperlink |
| 2 | Click the Select Location dropdown and select the agency |

| STEP | ACTION/TASK |
|------|-------------|
| 3 | Click the Select Staff Member dropdown and select the worker |
| 4 | Click Submit Assignment |

Assign Case                                    × Assign Case                                    ×

Name, Child        1000000              Name, Child        100000

**Assign to:**   [ Select Location        ⌄ ]    **Assign to:**   [ Agency Name        ⌄ ]

              [ Select Staff Member    ⌄ ]                   [ Worker Name        ⌄ ]

              [ Submit Assignment ] Cancel                  [ Submit Assignment ] Cancel

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.

### *Assigning a child from the All Child Cases list*

If a child's name does not display in the To Be Assigned, the child should still display on the View All Child Cases list, which is accessible from the Children tab.

| STEP | ACTION/TASK |
|------|-------------|
| 1 | Click on the Children tab |
| 2 | Click the 'View All Child Cases' button at the bottom of the page |
| 3 | Select the Radio button to the left of the child's name to be assigned |
| 4 | Click the Select Location dropdown and select the agency |
| 5 | Click the Select Staff Member dropdown and select the worker |
| 6 | Click Submit Assignment |

### *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.

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 |



| 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.

## 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***



| 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

The Contact Detail page displays an 'Entered On' field which will indicate when the contact was entered into the Portal. 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. | Announced Face to Face | 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 03/21/18

Child Name:            Person ID:          Entered On: **03/25/2018**

Edit Contact

| 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.

| STEP | ACTION/TASK |
|------|-------------|
| 1 | Click the 'Assign To' dropdown field and select the appropriate Supervisor or Administrator |
| 2 | Click the 'Submit' button |

### *Approving a Contact*

Supervisors and Administrators must approve all contacts entered in the Provider Portal. Administrators who complete contacts must submit contacts to themselves or another Administrator for approval. Supervisors must submit contacts to an Administrator for approval. Contacts submitted for approval are located under the 'Children' tab.



| 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 |



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                                    Save      Cancel

This is a test comment.

| STEP | ACTION/TASK |
|---|---|
| 1 | Click the 'View Narrative' button. A non-modifiable narrative form displays for review |
| 2 | Close the narrative form |
| 3 | Click the 'Approve Contact' button |

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

**Rejecting a Contact**
If the contact requires corrections, the Supervisor and/or Administrator should reject the contact. A contact can be rejected multiple times within the 72-hour period.  Contacts should be approved within the 72-hour period regardless of the number of times it is rejected. **'Rejected'** will display at the top of a rejected contact.

| STEP | ACTION/TASK |
|---|---|
| 1 | Click on the Children Tab |
| 2 | Click on the Submitted Contact tab |
| 3 | Click on the Method hyperlink |
| 4 | Click the View Narrative button to review the contact |
| 5 | Close the Narrative after reviewing |
| 6 | Enter comments in the Supervisor's Comment box (Comments must be entered to reject a comment). **Note: You can click on the Add Comment box or enter comments directly in the Supervisor's Comment box.** |
| 7 | Click the Reject Contact button at the top of the page |

## Contact Details 03/12/18

Child Name: **Millsap,Bryson**          Person ID: **19966540**          Entered On: **03/26/2018**

( Edit Contact )   ( Add Comment )   ( Approve Contact )   ( Reject Contact )

`

**Editing a Rejected Contact**

The rejected contact will display in the editable contact sections under the Contacts tab for the Case Manager. Contacts that are rejected within the 72-hour period will continue to count down from the original 72-hours until the time remaining to edit goes to 0. Users will receive a notification when a contact has been rejected. A status column displays to denote which contacts have been rejected and which contacts are in progress. An initial submit date column will display the date the rejected contact was submitted to the approver. This column will only display a date for contacts submitted for approval after May 12, 2018.

**Editable Contacts**                                                                                                          ^

| TIME REMAINING TO EDIT ▼ | METHOD | PURPOSE | PERSON CONTACTED | CONTACT DATE | STATUS | INITIAL SUBMIT DATE |
|---|---|---|---|---|---|---|
| 71hrs.56mins. | **Announced Face to Face** | Case Manager Child Visit | | 05/07/18 | Rejected | 05/10/18 |

| STEP | ACTION/TASK |
|---|---|
| 1 | Click on the Notifications Tab |
| 2 | Click on the View Case button for the rejected contact notification |
| 3 | Click on the Contacts tab |
| 4 | Click on the Method hyperlink for the rejected contact |
| 5 | Click on the Edit Contact button |
| 6 | Scroll down to review the Supervisors Comment box |
| 7 | Click View Narrative to make the corrections |
| 8 | Save the Narrative |
| 9 | Close the Narrative template |
| 10 | Click the Save and Finish Later button on the Contact Detail page |
| 11 | Click the Assign To dropdown arrow |
| 12 | Select the appropriate Supervisor/Administrator to submit the contact to |
| 13 | Click the Submit button |

| STEP | ACTION/TASK |
|------|-------------|
|      |             |

*These steps will be repeated each time a contact is rejected.*

**Rejection exception:** If a contact has no time remaining corrections are needed, the contact can be rejected and returned to the user. The same steps will apply. Users will see the time remaining to edit as –hrs. –min.

**Editable Contacts** ⌃

| TIME REMAINING TO EDIT ▾ | METHOD | PURPOSE | PERSON CONTACTED | CONTACT DATE | STATUS | INITIAL SUBMIT DATE |
|---|---|---|---|---|---|---|
| - hrs. - min. | **Announced Face to Face** | Case Manager Child Visit | | 03/26/18 | Rejected | |

Follow the steps for editing a rejected contact above. The time remaining will then display in **red**. The countdown will begin once the Method hyperlink is clicked. **Note: Approving a contact in the second rejection cycle may affect your PBP score.**

**Contact Search**

The Contact Search section is used to display historical contacts from the legacy Portal system as well as contacts entered and approved in the current system.

**Contact Search** ⌃

*Date From
[ mm/dd/yyyy ] 📅 TODAY

Date To
[ mm/dd/yyyy ] 📅 TODAY

Contact Type
[ Contact ]

*Child Discussed / In Reference To
[ ▾ ]

Contact Method
[ Select ▾ ]

Contacted By
[ Select ▾ ]

+Add Purpose

( Search )    Cancel

| STEP | ACTION/TASK |
|------|-------------|
| 1 | Expand the Contact Search section |
| 2 | Enter the Date From |
| 3 | The child's name will display in the Child Discussed/In Reference To field |
| 4 | To search for a contact with a specific purpose, click 'Add purpose' and select the appropriate purpose |
| 5 | Click Search |

## 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.

The Education Summary section of the Portal displays the information from the active education record with education type of 'School'.  If no 'School' education type exists for the child, the information displayed in this section will display as follows:
- o   If there exists only one active education record, that information will display
- o   If there exists more than one active record with the same education type, the information from the record with the earliest enrollment date will display
- o   If there exists more than one Child Care, but one is indicated with a grade of 'Pre-K', the 'Pre-K' information will display
- o   If there happens to be an active Head Start or Early Head Start and Child Care record, the Head Start or Early Head Start information will display

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.

Portal users can add multiple, active education records for a child with all education types except for 'School'.  Only one active 'School' record may exist at one time. If a child/youth is enrolled in a before or after-school program, this information can also be added to the Education tab, along with the primary school enrollment.

### *Adding an Education Record*

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

**Education Summary**                                                                                    ^

Currently Enrolled: No                 Current School Name:              Grade:
                                       School Address:                   IEP:

**Education Log**                                                                                        ^

| ENROLLED DATE ▾ | SCHOOL NAME | GRADE | GRADE COMPLETED | WITHDRAWAL DATE | ENTERED BY |
|---|---|---|---|---|---|
| No records exist | | | | | |

Showing 0 to 0 of 0 entries.

( Add School )

| STEP | ACTION/TASK |
|---|---|
| 1 | Click the Children tab |
| 2 | Click the Education tab |

| STEP | ACTION/TASK |
|---|---|
| 3 | Click 'Add School' |

**Add School**                                                                X

Category                                              Enrollment Date

School ▼                                              mm/dd/yyyy  📅 TODAY

School Name                                           Grade

                                                      Select ▼

Select Resource

| STEP | ACTION/TASK |
|---|---|
| 4 | Select the 'Category' (Child Care, Early Head Start, Head Start, Home School, Informal Child Care, 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**

**Category**                                              **Enrollment Date**
                                                          09/12/2017

**School Name**                                           **Grade**
North Clayton Middle School                               6

**School Address Line 1**                                 **School Address Line 2**
1 MAIN ST                                                 5517 w. fayetteville rd.

**City**                          **State**          **Zipcode**          **County**
Colleg park                       Georgia            30349                Clayton

**Withdrawal Date**

mm/dd/yyyy                📅  TODAY

Save     Cancel

| 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***

| 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 |



| 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*

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

### *Adding 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 |



| 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.

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.

The Legal Summary section allows portal users to launch the Provider View of the Foster Care Case Plan, if it has been approved in SHINES. If there is no approved case plan in SHINES, portal users will see a red circle with a line in the center indicating that the case plan cannot be launched. **NOTE: The provider view of the case plan became available in SHINES in September 2017. If the case plan has not been updated since September 2017, the provider view of the case plan will not be enabled until a new case plan has been approved in SHINES.**

To launch the Foster Care Case plan:

| STEP | ACTION/TASK |
|------|-------------|
| 1 | Click on the Child Name hyperlink |
| 2 | Click on the Legal Tab |
| 3 | Click on the 'Provider View of Case Plan' button |
| 4 | The case plan will launch in PDF format |

## 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.

**Health Documents**

| UPLOAD DATE ▼ | DOCUMENT CLASS | TYPE | FILE NAME | ENTERED BY | DETAILS | DOWNLOAD |
|---|---|---|---|---|---|---|
| 12/03/17 | Health Information | Medical Log | f3a445a1b7e2972209 | . | Test Upload | **Download** |

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 | **Download** |

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. <mark>Users are unable to modify the email address in the Basic Information section.</mark>

## Account Profile
### Basic Information

| 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' |

Password

**Enter Password:** *************

**\*Enter Password**

**\*Re-enter Password**

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

Change My Password    Cancel

| 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 1 Answer:**

What was your childhood nickname?

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

What is the name of your favorite childhood friend?

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

What is the name of the street you lived on in third grade?

Update My Questions    Cancel

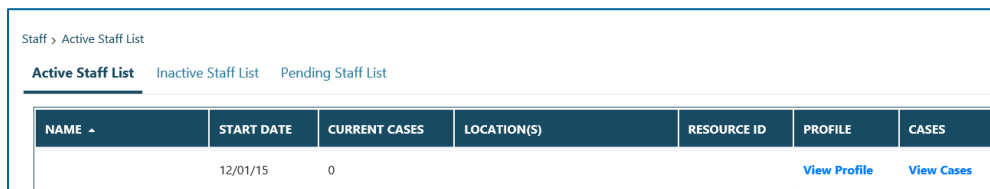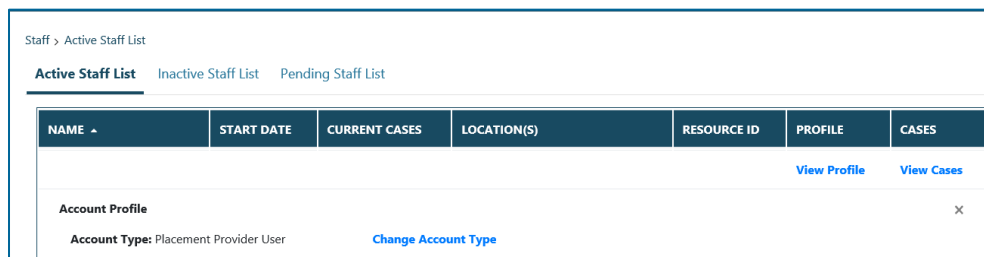| STEP | ACTION/TASK |
|------|-------------|
| 2 | Select new questions |
| 3 | Enter the answers for the new questions |
| 4 | Click 'Update My Questions' |

### *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 | | | View Profile | View Cases |

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

Staff › Active Staff List

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

| NAME ▲ | START DATE | CURRENT CASES | LOCATION(S) | RESOURCE ID | PROFILE | CASES |
|---|---|---|---|---|---|---|
| | | | | | View Profile | View Cases |

**Account Profile**                                                                                   ✕

   **Account Type:** Placement Provider User          **Change Account Type**

| 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 |



| 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. ==Staff members with the role of Administrator cannot add themselves to other locations, this function must still be performed by another Administrator assigned to that location.==



| STEP | ACTION/TASK |
|------|-------------|
| 1 | Click the 'Staff' tab |

| STEP | ACTION/TASK |
|:---:|:---|
| 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.

## APPENDIX: REPORTING FOR PBP MEASURES IN GA SHINES

When recording contact events as described on page 16, select the Purpose Type (Step 8)
and Narrative Type (step 10) as indicated in the following chart for each PBP measure:

| Measure | Purpose Type | Narrative Type |
|---|---|---|
| Sibling Contacts | Sibling Visit | Standard |
| EPSDT Medical | Medical | Standard |
| EPSDT Dental | Medical | Standard |
| ECEM | Case Manager-Child Visit | Safety, Permanency and Well-Being |
| General Contact | Case Manager-Child Visit | Standard |
| Permanency Contact | Parent-Child Visit | Parent/Child Visitation |
| **IL and TLP Providers Only** | | |
| Independent Living Skills Provision | NYTD Preparation | Standard |
| WTLP/Life Coach | Case Manager-Child Visit | Standard |