

## Pre-ETS Phase 1 Startup Instructions

The backlog of Intakes submitted to VR have been entered for each contract. There are a few one-time startup tasks associated only with the 'backlog' cases. Instructions are on page 2. **Note: Task #1 is required.**

Normally and going forward, when an Intake case is entered into the portal, it will automatically be assigned to the consultant who entered the Intake. However, VR staff (who entered all of the backlog Intakes) cannot be assigned to a case, only contractors can be assigned. Because the Contractor is known, by default when a VR staff person enters an Intake, the case will be automatically assigned to the *Contract Lead*.

VR does not have information regarding which Agency/Pre-ETS Consultant was assigned to the case. **Therefore, Agency Leads or Contract Leads will need to transfer the intakes to the assigned Pre-ETS Consultant. This needs to be done as soon as possible after the system is available.**

Transferring the case will do three things:

- 1) associate the case with the appropriate Agency under your contract
- 2) allow access to the case for all employees in that Agency
- 3) assign the case to the responsible Pre-ETS Consultant.

**Important: If the case's Agency is not the same Agency as that of the Contract Lead (e.g., the case is assigned to Cardinal Services under Peak Community Services), that Agency won't have access to the case until the transfer is complete!**

**As a result, that Agency's staff will also be unable to enter new Services for those Intakes until the Transfers are complete. Also, VR will wait to enter the 'backlog' Services until the Transfers are complete in order to associate the services provision to the appropriate agency.**

***For these reasons, transfers should be completed as quickly as possible, with highest priority given to the 'sub-agency' cases.***

This can be done using the **Transfer Case** function under the Administration menu.

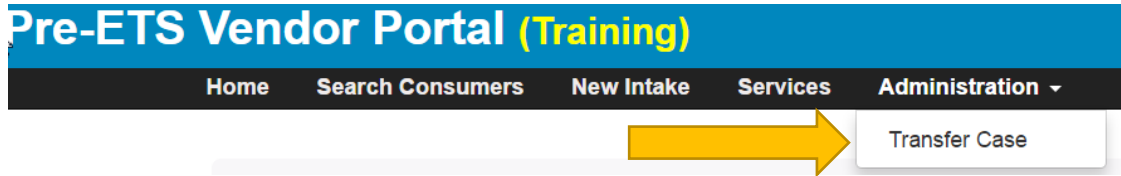
Also, some fields were not available on the Intake form which were added to the system later as potentially useful information. For example: School, Consumer Email, Parent or Legal Guardian Phone and Email, Emergency Contact Email. [Where possible, School information was obtained from IEP and entered by VR.] Staff may want to update the Intake with this information, particularly the School field as it can be used as a search criteria throughout the system.

Also if the SSN was not available at Intake but was obtained later, please update this value on the Intake screen as soon as possible. This will greatly assist VR to avoid duplication of services and to provide accurate federal reporting.

**New Intakes, and associated Services for the new Intakes can be entered as soon as the system goes live.** It is only the 'backlog' cases that will require special one-time startup tasks.

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- 1) Transfer the 'backlog' cases to the appropriate Pre-ETS Consultant. Transfer Case is under the Administration Menu. Agency Leads and Contractor Leads have access to this functionality.



- 2) Each Agency Lead has the authority to transfer the cases belonging to their Agency.

Pre-ETS Vendor Portal (Training)

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Transfer Case

Type of Search Consumer Name  
Contractor All

Consumer Name Search by Last Name or Last Name, First I  
Agency All

Consumer Status All  
Pre-ETS Consultant Freeman, Meredith

Select All Total Records: 15

Consumer ID	Consumer Name	Contractor	Pre-ETS Consultant	School Name	County	Consumer Sta...	Temp SSN	
<input checked="" type="checkbox"/>	600001	Test Pre-ETS LN, Test Pre-ET...	Bona Vista Programs	Freeman, Meredith	Eastern High School	Hamilton	In-Service	Yes
<input checked="" type="checkbox"/>	600013	JLsix, TestSix	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	No
<input type="checkbox"/>	600014	JLSeven, TestSeven	Bona Vista Programs	Freeman, Meredith		Madison	In-Service	No
<input type="checkbox"/>	600015	JLEight, TestEight	Bona Vista Programs	Freeman, Meredith	Kokomo High School	Hancock	In-Service	No
<input type="checkbox"/>	600036	Test Test, Test	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	No
<input type="checkbox"/>	600041	Testcase, Emma L	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	Yes
<input type="checkbox"/>	600042	Testcase2, Emma L	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	No
<input type="checkbox"/>	600043	test case seq1, first case seq 1	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	No
<input checked="" type="checkbox"/>	600044	last, first	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	Yes
<input checked="" type="checkbox"/>	600047	last name 123, first name123	Bona Vista Programs	Freeman, Meredith		Hamilton	In-Service	No
<input type="checkbox"/>	600061	req, qer	Bona Vista Programs	Freeman, Meredith	Northwestern Senior High ...	Hamilton	In-Service	Yes
<input type="checkbox"/>	600077	Damon, Matt	Bona Vista Programs	Freeman, Meredith	Eastbrook High School	Hamilton	In-Service	No
<input type="checkbox"/>	600082	Slathom, Jason	Bona Vista Programs	Freeman, Meredith	Heartland Career Center	Hamilton	In-Service	Yes
<input checked="" type="checkbox"/>	600083	Test, test45	Bona Vista Programs	Freeman, Meredith		Hamilton	Intake	No
<input type="checkbox"/>	600085	etfggg, fggh	Bona Vista Program	Freeman, Meredith	Eastern High School	Hamilton	Intake	No

Transfer the case(s) to: Rominger, Michael(Carey Services) Transfer

- 3) Select the Contract Lead's name in the Pre-ETS Consultant search field.
- 4) Select the name of the assigned Pre-ETS Consultant in the Transfer the Case(s) to: field.
- 5) Browse through the list of Consumers. Check the checkbox in leftmost column for every case assigned to that Pre-ETS Consultant. If there are many cases, you may need to use the scroll bar on the right side of the grid to scroll down to select additional cases.
- 6) Once you have checked the desired cases, Click the Transfer button. A message will be displayed when the case(s) are successfully transferred. You will see the number of cases in the grid are reduced. Note: You don't have to transfer all of the cases at once, you can do a few at a time, or you can scroll through the entire list to check all of the boxes and transfer all at once.... whichever is easiest for you.
- 7) When you are done with the transfers for a Pre-ETS Consultant, you can then search by the assigned Pre-ETS Consultant to review and ensure that everyone in their list is correct, and that you've transferred all of their cases.
- 8) Repeat this process for all Pre-ETS Consultants. Note: If you are a Contractor Lead who is handling some cases personally, your cases will not need to be transferred.
- 9) Agency Leads: When your Agency's transfers are complete, report this to your Contractor Lead.
- 10) Contractor Leads: When all Agencies have reported that their transfers are complete, check to make sure there aren't any straggling cases still assigned to the Contract Lead. Once you confirm that all transfers have been completed, report this to VR and to your Agency Leads. This will allow VR to know that it is OK to proceed with Services backlog data entry and the Agency Leads to notify staff they can add new Services for these cases.