Pre-ETS Vendor Portal Cheat Sheet

1. **Home Page**
    a. Click on the desired function:
        - Search Consumers
        - Intake
        - Services
        - Administrative Menu
            - Transfer Case
2. **Consumer Search**
    a. Enter search criteria to find an existing consumer. This can be one, none or a combination of several search fields. *Hint: The less search criteria that is used, the more results you will receive. Entering additional search criteria will narrow your results.*
    b. If you cannot find the consumer you are seeking, click on the Create New Intake button to enter the consumer's Intake information.
    c. Double click on a selected record to Add/Modify Service.
3. **Intake**
    a. Enter all required fields and click Save.
        - If errors occur, they will be displayed on the screen. Correct the errors in order to Save the Intake record.
        - You will be unable to enter Services until you successfully save the consumer's Intake record.
4. **Services**
    a. Services Search –
        - Enter search criteria to find an existing service session. This can be one, none or a combination of several search fields. *Hint: The less search criteria that is used, the more results you will receive. Entering additional search criteria will narrow your results.*
        - If you cannot find the service session you are seeking, click on the Create New Service button to enter service session information.
            1. A service is reported with actual information *after* it has been provided (planned services with future service dates are not allowed).

2. Only one contractor/agency can be represented per service session report.
3. Add all of the Services provided in the Session and the Consumer(s) that attended, and click Save.
4. The same function can be used for Individual consumer service sessions or Group consumer service sessions.

b. Add Services -
- Click on the Add Services button. Select all of the service categories that were provided during the session by checking the appropriate checkboxes.
- Click OK.
- Enter the time spent in minutes and a description of the activities per service category.

c. Add Consumer –
- Click on the Add Consumer button.
- Search for the consumers and select all that attended the session by checking the appropriate checkboxes.
- Click OK.

5. Administrative Menu

a. **Transfer Case** – This function is used to transfer case(s) from one Pre-ETS consultant to another. This can be done across agencies within a contract group.
- Search for the desired consumer case(s) using one or more of the available search criteria.
- Select the desired case(s) by checking the appropriate checkboxes. One, several or all case(s) in the list can be selected.
- Select the desired 'Transfer to' Pre-ETS Consultant to whom the case(s) will be transferred.
- Click Transfer.