Welcome to T3C Training for extendedReach Users



by Whispering Pines Consulting

& Emily Parks, MSW – Consultant www.whisperingpinesconsulting.com









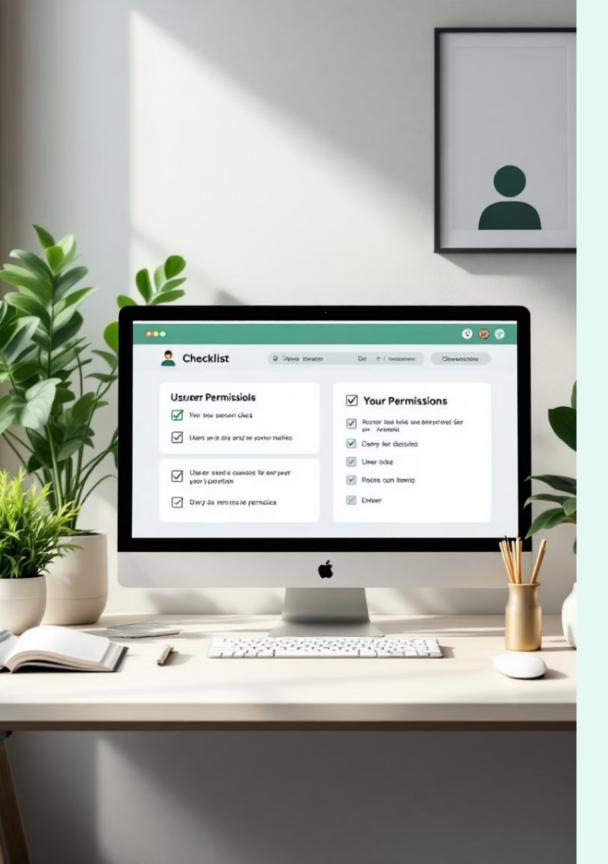
Preparing eR for T3C

to Meet Reporting Requirements





by Emily Parks



Prerequisites and System Requirements



Texas Foster Care/Residential System/GCM System

Must have an active Texas Foster Care or Residential system already configured in extendedReach

Full Administrator Permissions

Requires an extendedReach User ID with Full Administrator user permissions to access configuration settings

System Evaluation Readiness

Prepared to assess current feature usage and determine configuration needs for T3C compliance

Program Categories and Custom Fields Configuration

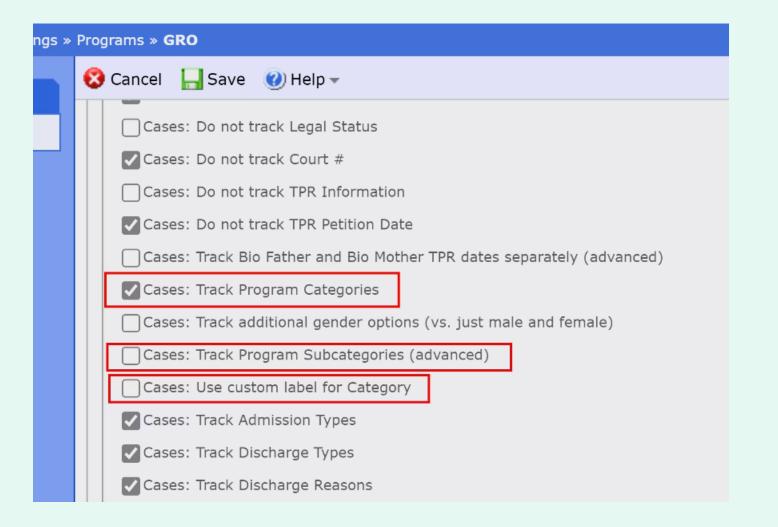


Program Categories Assessment

Review your ability to add program categories and subcategories for both legacy and T3C requirements. If possible, add categories for credentialed service packages and update existing program reports to include new categories.

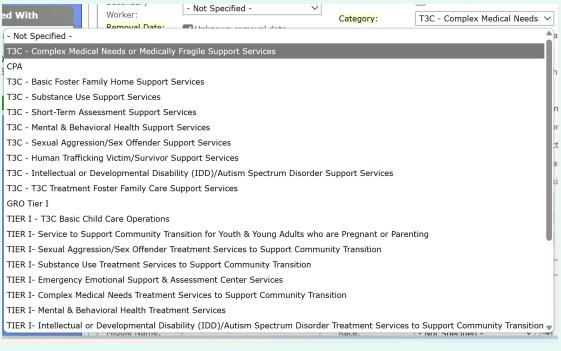
Custom Fields Evaluation

Examine current program custom field usage and availability. Determine if you have sufficient extra fields to accommodate T3C requirements, or if a new program addition is necessary.



Categories and Subcategories



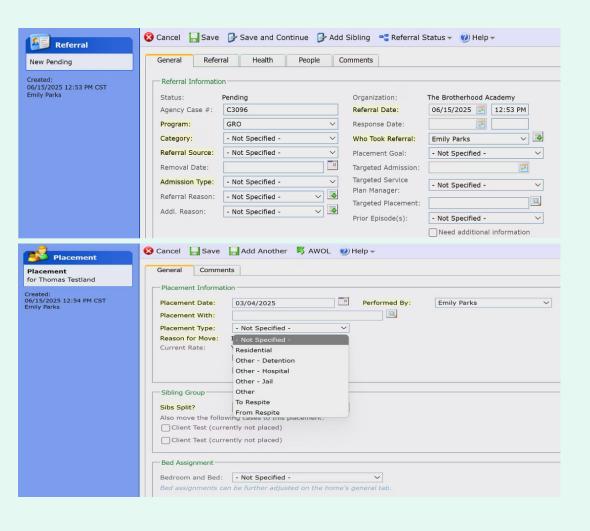


Category: T3C - Complex Medical Needs ✓ A. Transition Support for Youth and Young Adults B. Kinship Caregiver Support C. Pregnant and Parenting Youth D. None Treatment Services: ASD (Autism Spectrum Disorder) Treatment Services: ED (Emotional Disorder) Treatment Services: ID (Intellectual Disability) Treatment Services: PMN (Primary Medical Needs) Treatment Services: TV (Trafficking Victim)

Subcategory Formula

@If(CC_Category="Treatment Services";"ED (Emotional Disorder) | ED":"ID (Intellectual Disability) | ID":"ASD (Autism Spectrum Disorder) | ASD":"PMN (Primary Medical Needs) | PMN":"TV (Trafficking Victim) |
TV";CC_Category="T3C - Basic Foster Family Home Support Services":"T3C Short-Term Assessment Support Services":"T3C - Mental & Behavioral Health
Support Services":"T3C - Complex Medical Needs or Medically Fragile
Support Services":"T3C - Intellectual or Developmentally Disability
(IDD)/Autism Spectrum Disorder Support Services":"T3C - Treatment Foster
Family Care Support Services";"A. Transition Support for Youth and Young
Adults":"B. Kinship Caregiver Support":"C. Pregnant and Parenting
Youth":"D. None":"Treatment Services: ED (Emotional Disorder) |
ED":"Treatment Services: ID (Intellectual Disability) | ID":"Treatment
Services: ASD (Autism Spectrum Disorder) | ASD":"Treatment Services: PMN
(Primary Medical Needs) | PMN":"Treatment Services: TV (Trafficking Victim) |
TV";"")

Formula is plug and play. Just change the words inside the parenthesis "xxx", or add a colon and new parenthesis to add legacy options.



Referral Tracking and Respite Management



Referral System Setup

Enable referral tracking if not currently active and add necessary denial reasons for T3C compliance. 2 Places in eR to configure:

Uncheck box below

Program Settings > Setup Tab

Cases: Do not track referrals

Org Settings > Org Preferences > Settings Tab

Reporting Configuration

Configure reporting for pending and rejected referrals to maintain comprehensive tracking

2



Respite Home Tracking

Ensure respite tracking covers both legacy and T3C placements with appropriate payment configurations

-Rates for legacy and T3C in Programs > Program Rate Sheets

Org Settings > Org Prefs > Settings > Scroll down and select.

May need a zero-dollar rate for when Homes have more than 40 hrs-respite/year.



3

Foster Parent Training and Provider Types



Training Hours Configuration

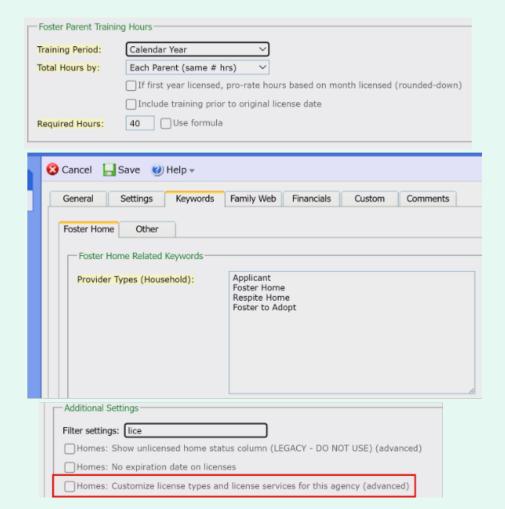
Configure Foster Parent Training Hours to meet both legacy and new T3C requirements. Custom formulas available through Customer Success Manager if needed.

Provider Type Matching

Add provider types that align with credentialed service packages for T3C. Update existing home reports and Foster Family Website access accordingly.

License Type Updates

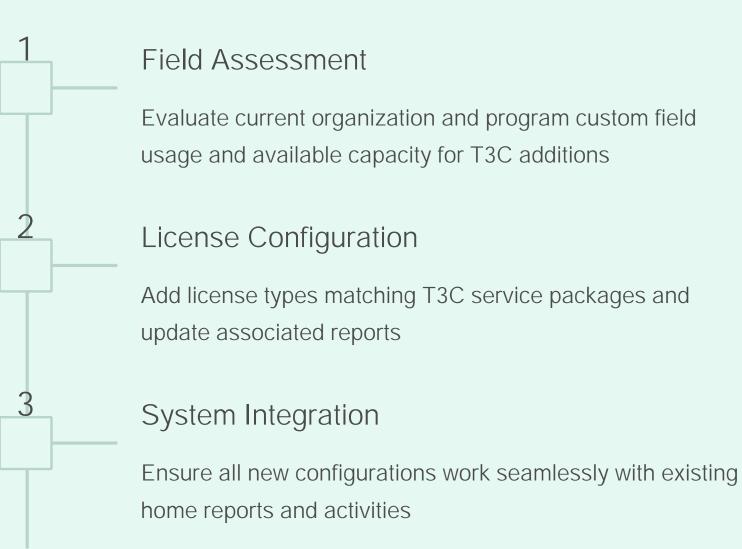
Establish license types that correspond to T3C service packages and update home reports with new license triggers.

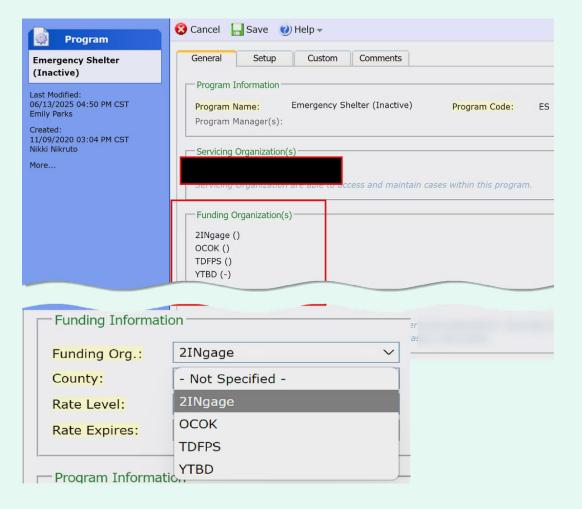




Organization Custom Fields and License Management







ExtendedReach Support Services





Funding

Organizations

Email Support to add required funding organizations to your T3C programs.

These will be your SSCCs you contract with



Enterprise Financials

Contact Customer Success

Manager for T3C enterprise

financial setup assistance



Rate Sheets & Reports

Custom import services for service package rates and Zoho report templates for outcome tracking



Revision Tracking

Email Support to ask what revisions are currently enabled in your system. Revisions enable date tracking for case and home file changes required for T3C compliance. ex.

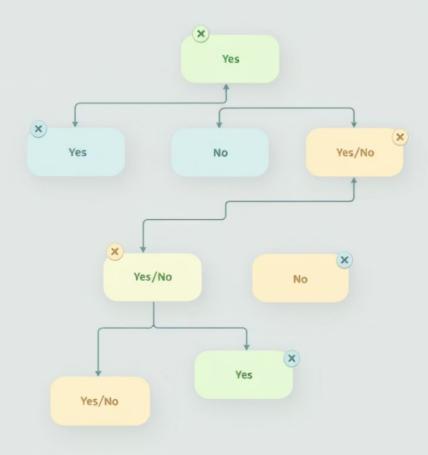
Categories, subcategories, custom fields



Revisions

Any field in eR can have a revision date added. Revisions allow you to backdate when a particular field changes. eR will track all revisions under the Case File and Home File Tab (sort by revisions)

Decision Tree



Implementation Decision Framework



Evaluate Current Capabilities

Review each feature against T3C requirements using the provided assessment questions. Determine if existing configurations can accommodate new needs or if system expansion is necessary. Whispering Pines Consulting can help evaluate your system for efficiency.

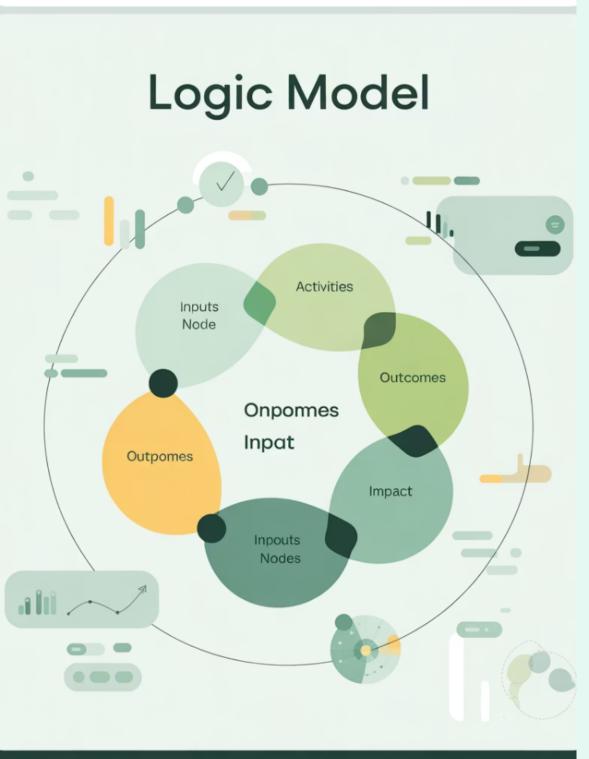
Configure or Expand

If current features are sufficient, proceed with configuration using linked help articles. If not, consider adding new programs or organizations while consulting with your Customer Success Manager.

Implement and Monitor

Execute chosen configuration strategy, ensuring all T3C requirements are met while maintaining efficient record tracking. Utilize extendedReach support services as needed for specialized implementations.





Logic Models and Outcome Measurement

Bolded outcomes should be incorporated into Logic Models - but how to define/measure will be specific to each agency - below are some internal eR report examples:



by Emily Parks



Safety Outcome Measurement

Casework -> Incidents -> By Type Abuse/Neglect

Track and measure incidents categorized as abuse or neglect to ensure safety standards are maintained.

Casework -> Incidents -> By Type -> Restraints

Monitor the frequency and circumstances of restraint usage to minimize restrictive interventions.

Casework -> Incidents -> By Type -> Injury

Document and analyze injury incidents to identify patterns and implement preventative measures.

Casework -> Placements -> By Subsequent Placement

Evaluate placement stability and transitions to ensure safe and appropriate environments.



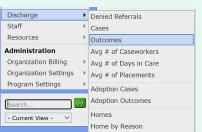
Permanency Outcome Measurement



Discharge

D/C Outcome = Permanency Goal

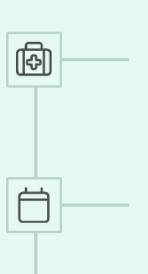
Discharge -> D/C Outcome = Permanency Goal







Well-Being Outcome Measurement



Specific Activities Completed

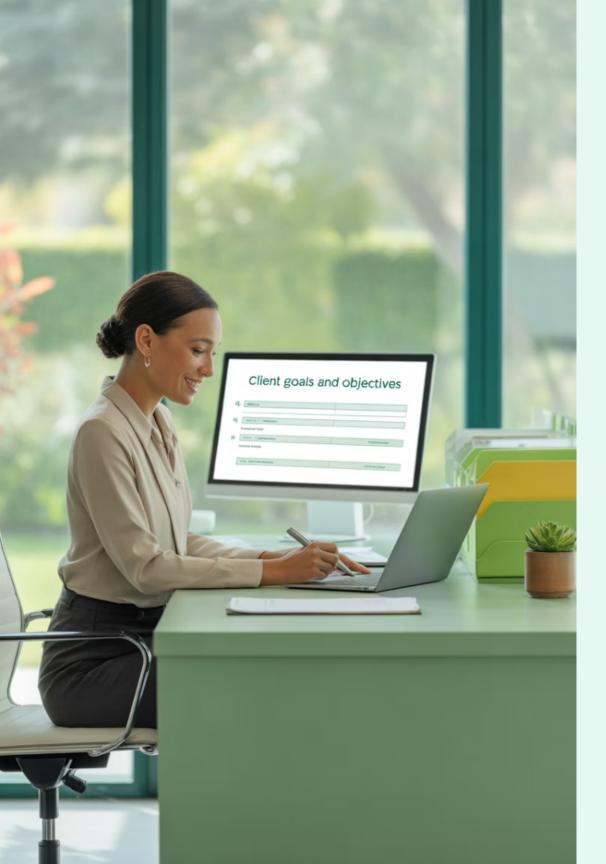
Medical, Dental, Therapy, etc.

Compliance with Healthcare Appts.

Tracking attendance and follow-through with scheduled appointments

Service Plan Goal Progress

Tx Tab -> Casework -> Treatment Goals or Zoho



Implementation Requirements





Required Documentation

Also - ensure that agencies are using the TX Single Child Plan of Service custom form. Reach out to your Customer Success Manager to copy the custom form into your system. It comes field coded



Consistent Reporting

Maintain standardized documentation practices across all cases



Regular Updates

Keep service plans current with client progress and changing needs

Understanding User Management in extendedReach

Managing access to your organization's data requires a clear understanding of how user accounts work in extendedReach. This presentation explores the critical difference between User IDs and Staff Profiles, how they function together, and best practices for managing them effectively within your organization.





Administration Organization Billing Organization Settings Program Settings Program Settings Staff Profiles Staff Document Types Staff Training Types User Groups User IDs

User ID: The Gateway to Access





Login Credentials

Consists of a unique email address and password that allows employees to access the extendedReach system



Security Permissions

Determines what the user can see and what actions they can perform within the system



Workspace Configuration

Controls the layout and available features visible to each user upon login



Deletion Required

Must be deleted when staff leave to prevent unauthorized access (cannot be disabled or made inactive)



Staff Profile: The Digital Personnel File

Core Functions

The Staff Profile serves as the digital "staff record" or "HR file" within extendedReach. It stores essential information about each staff member and connects them to their work in the system.

- Stores digital signature for approvals
- Tracks credentials and qualifications
- Records contact information and emergency contacts
- Maintains employment history including hire date

Document Management

Staff Profiles enable comprehensive tracking of employee documentation and professional development requirements.

- Stores staff-related documents
- Tracks training completions and hours
- Monitors certification expiration dates
- Generates alerts for upcoming renewals

When Staff Profiles Are Required



Documentation Creation & Approval

Staff who need to perform or approve activities and reports must have a Staff Profile



Case & Home Assignment

Staff who need to be assigned to cases or homes as primary workers require a Staff Profile



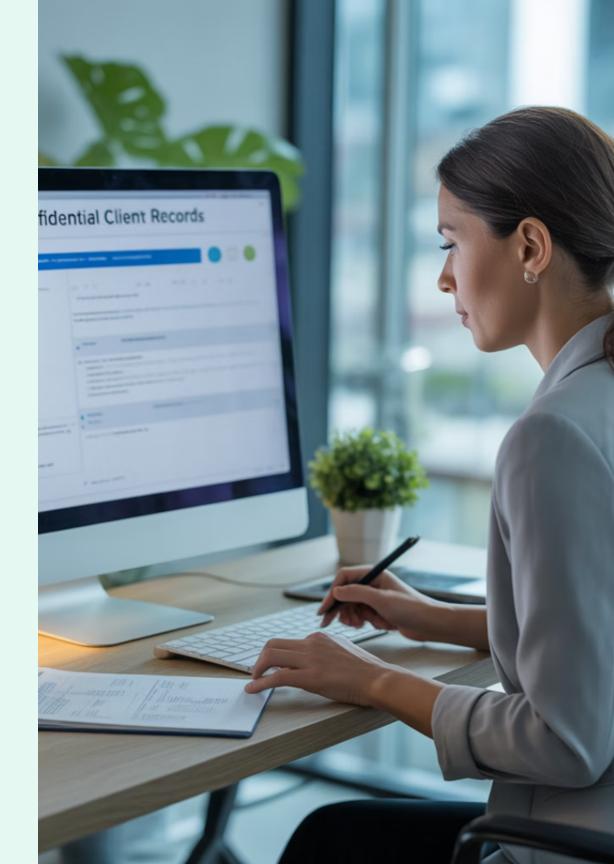
Supervisory Responsibilities

Staff who serve as supervisors for other staff members need a Staff Profile



Performance Tracking

Activities and reports are tied to Staff Profiles, not User IDs, for accountability



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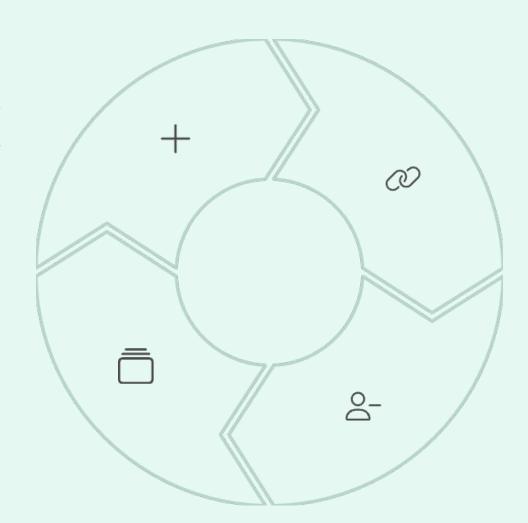
The Relationship Between User IDs and Staff Profiles

Creation

Staff Profiles can be automatically created when setting up a new User ID

Preservation

Inactive Staff Profiles maintain historical record of staff work while preventing new assignments



Connection

User IDs can be linked to existing
Staff Profiles to grant system access

Deactivation

When a User ID is deleted, you're prompted to make the linked Staff Profile inactive



Special Cases in User Management

Staff Profile Without User ID

For staff whose documents and training need tracking, but who don't need system access. This allows HR tracking without granting login credentials.

User ID Without Staff Profile

For roles requiring view-only access like auditors or executives who need to see reports but won't be assigned cases or completing documentation.

Multiple User IDs

In rare cases, one staff member might need multiple User IDs to access different organization instances, though a single Staff Profile should be maintained.



Privacy and Security Considerations





Full Administrators and Restricted Staff Administrators with access to the Staff Directory can see all personal information in Staff Profiles

Document Access

Administrators can view all documents and training files uploaded to any Staff Profile

User ID Security

28

User IDs must be deleted promptly when staff leave to prevent unauthorized access to the system

Permissions Management

Regular review of user permissions ensures staff only have access to information necessary for their roles





Best Practices for User Management

1

Regular Audits

Conduct periodic reviews of active User IDs and Staff Profiles to ensure they match current employment records

2

Prompt Termination

Delete User IDs immediately when staff leave your organization to maintain system security

3

Clear Documentation

Maintain thorough records of which staff require both User IDs and Staff Profiles based on their job functions

4

Role-Based Setup

Configure security permissions based on standardized role definitions rather than individual preferences



Foster Care: Adding a User ID to extendedReach



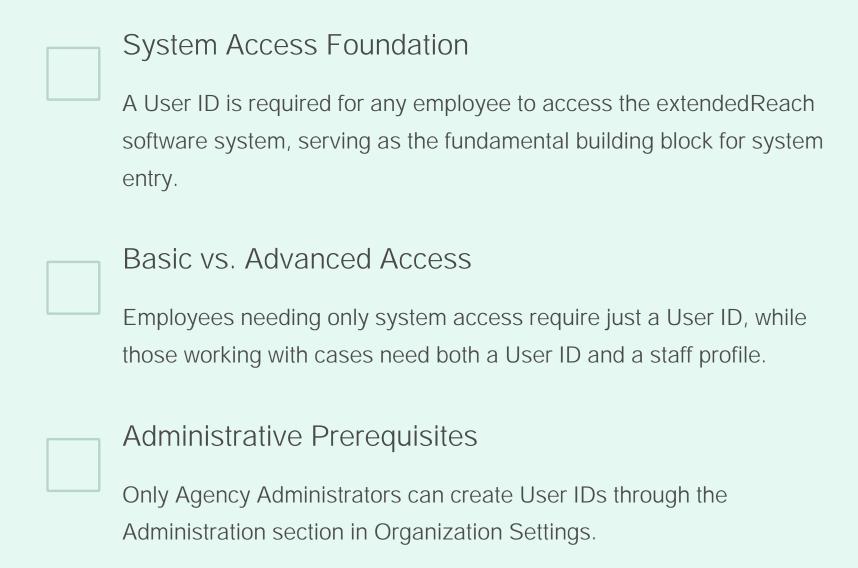
This comprehensive guide will walk you through the process of adding a User ID to the extendedReach foster care management system. A User ID is the essential first step for granting new employees access to the system and ensuring proper security protocols are followed.

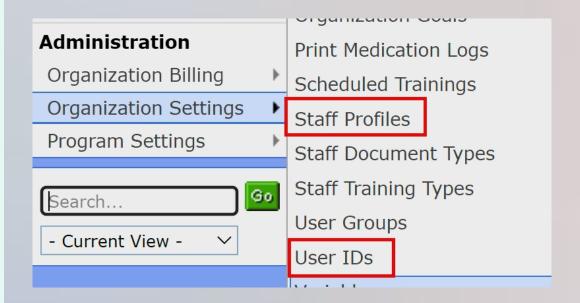
Whether you're adding basic system access or preparing for full case management capabilities, understanding the User ID creation process is crucial for effective system administration and maintaining organizational security standards.



by Emily Parks

Understanding User ID Requirements





Security Level Requirements and Access

Verify Administrator Status

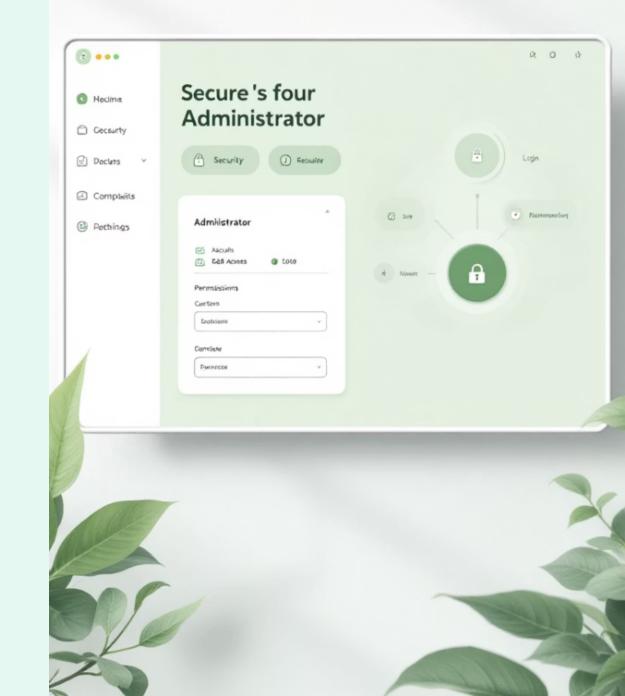
Confirm you have Agency Administrator privileges to access the Administration section on the left side of your Workspace.

Navigate to Organization Settings

Click on "Organization Settings" from the Administration menu to access user management tools.

Access User ID Management

Select "User IDs" from the Organization Settings menu to begin the user creation process.









Creating a New User ID

Initiate User Creation

Within the User IDs section, click on "Add User ID" to begin the new user setup process.

Complete Required Information

Fill out all highlighted required fields while optional fields can be completed as needed for your organization.

Save and Finalize

3

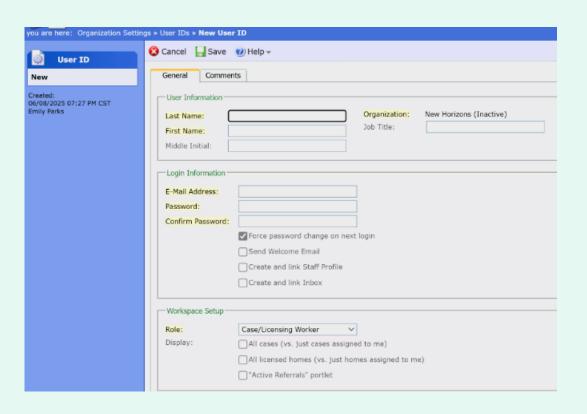
Press SAVE to complete the User ID creation process and activate the new account.

User Information and Login Details



User Information Requirements

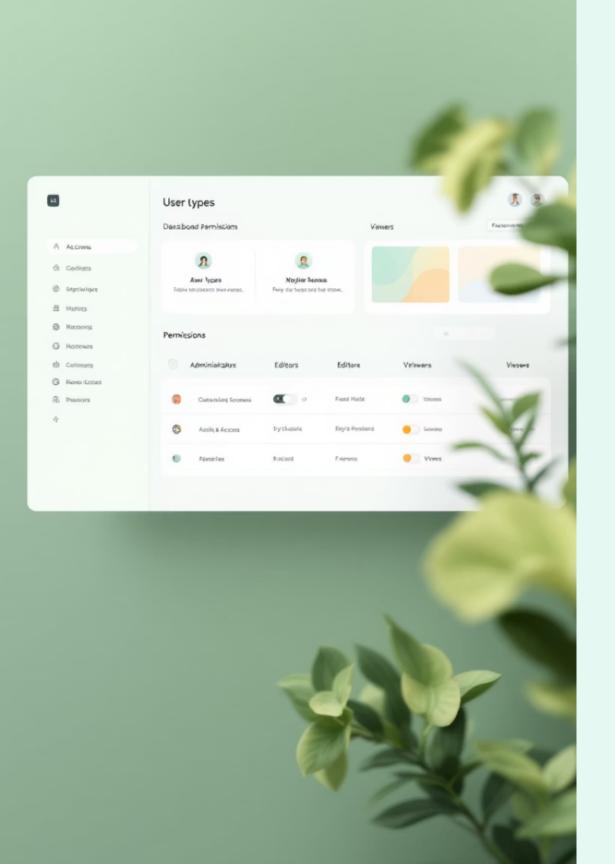
Complete the staff member's last name, first name, middle initial, organization, and job title. Note that relocating a staff member to a new organization requires deleting and recreating their User ID.



Login Configuration

Enter the work email address for system login, create a password with confirmation, and configure options for password changes, welcome emails, staff profiles, and inbox creation as needed.

Weekly Status Email:	- None -		~	(emailed weekl	y Sunday at 5PM I	EST)
File Manager:	eR Plugin		~			
Download Folder:	System Tempo	rary	~			
Options:	Hide help ico	on (lower right corr	ner)			
Security Rights						
Group:	- No Group Assig	ined - V				
Administrator:	No	~	?			
Apply Profile:	- Select a Profile	to Apply - V				
Type A	.dd	<u>Delete</u>	Edit		<u>Approve</u>	Complete
Cases:					-	-
Case Activities:						
Case Reports:						
Homes:						-
Home Activities:						



Workspace Setup and Role Assignment



Administrative Support

Configure portlets for active referrals and awaiting approval items. Include medical information restriction option for subcontractors.

Case/Licensing Worker

Set access to all cases versus assigned cases only, configure licensed homes visibility, and enable active referrals portlet.

Supervisor

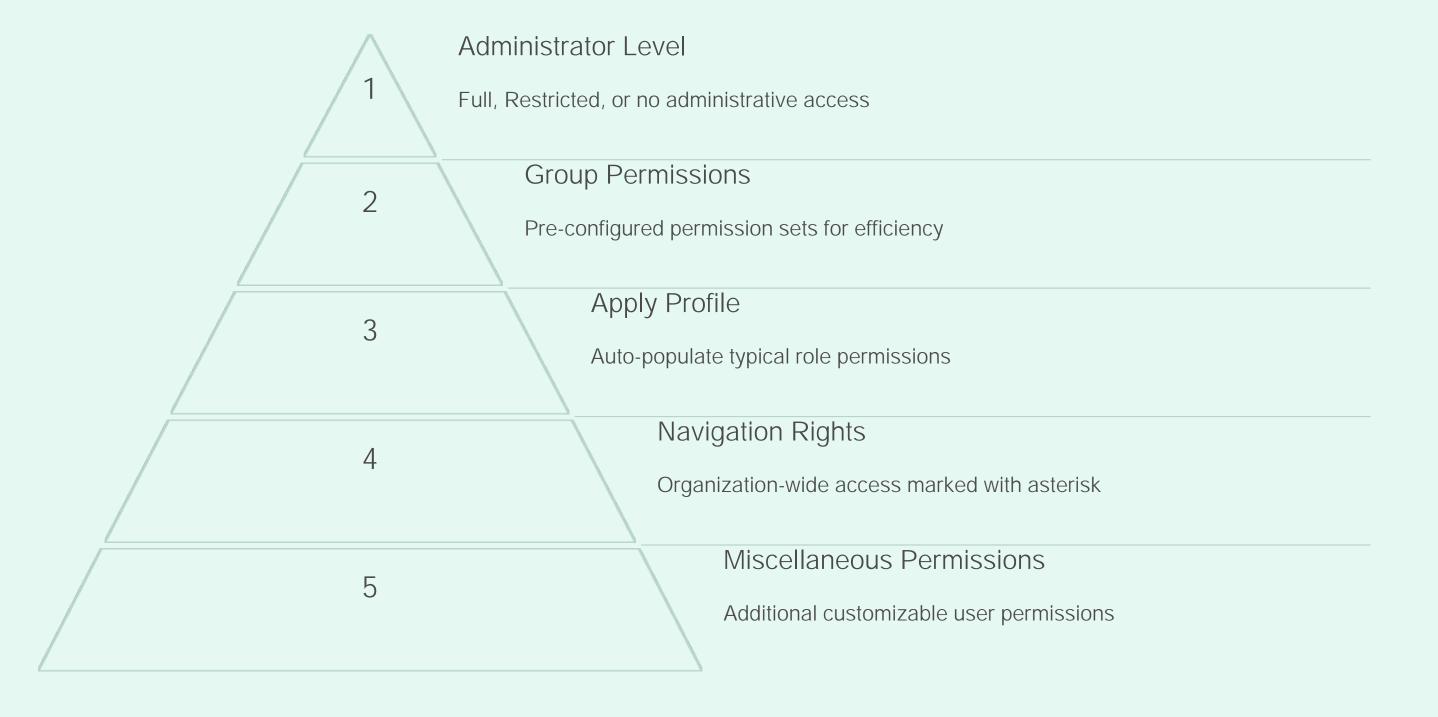
Choose between viewing only supervised workers or all workers, configure report approval access, and set up referrals and approval portlets.

House Worker/Parent

Direct Care or House Parents-Use the Homes field to specify which homes or facilities the user should have access to for their role.

Security Rights and Permissions



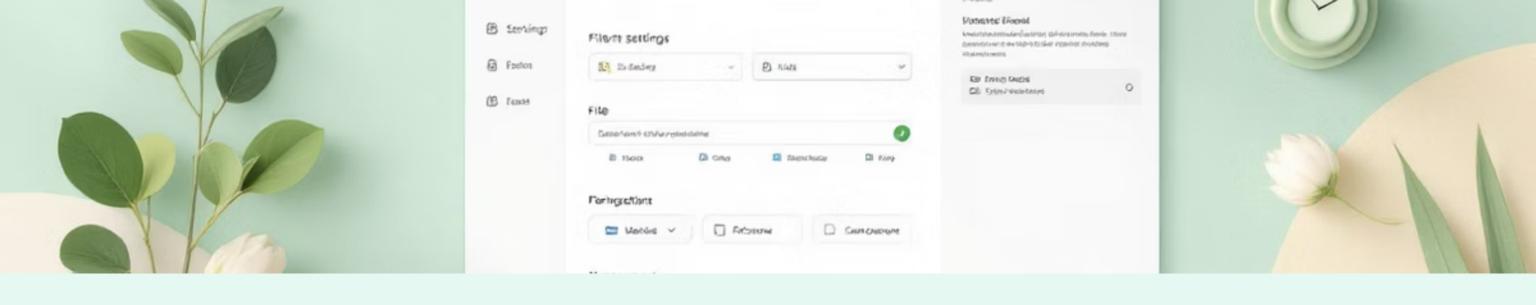


Permissions



*ORGANIZATION-W	IDE data is accessible within these permissions
Navigation:	✓ Access My Stuff Menus
	Access Cases Menus *
	Access Homes Menus *
	Access Summaries Menus *
	Access Summaries (Staff & Resources Only) *
	Access Summaries (Resources Only)
	Use Search *
	Modify Workspace Setup
	Modify Other Options (Status Email, Download Folder, etc.)
	Navigate to Linked Cases *
	☐ Hide the Display of Linked Cases *
	Navigate to Staff Profiles *

Misc. Permissions:	Change Client Name
	Change Case Number
	Change Customer Number
	Change Funding Organization
	Change Due Dates / Delete Activities + Reports with Due Dates
	Allow 'Stop Tracking Expiration' Dates on Activities + Reports
	Change Home Number
	Change Rate Level
	Change Vendor Number
	Manage Referrals
	Undo/Modify Discharge on Cases and Homes
	✓ Manage Address Book
	✓ Manage Shared Forms + Files
	Enters casework on behalf of others (select any staff name for "Performed By"/"Approved By")
	Access confidential information for all cases
	Assign select homes/facilities (below) to House Parent role workspaces
	Access confidential information for all homes
	Show Recent Incident Summary on workspace *
	Show Case Daily Activity Summary on workspace
	Show Home Daily Activity Summary on workspace
	Restrict access to Family Web Tabs
	Restrict access to select case activity and report types
	Restrict access to select home activity and report types
	Restrict access to activity / report history and on-time status



Additional Configuration Options



Weekly Status Email

Configure automated weekly emails for cases and homes to keep stakeholders informed of system activity and updates.



File Manager Setup

eR Plugin serves as the default proprietary software allowing users to edit documents directly within the extendedReach database.



Download Folder

Designate the temporary location where extendedReach holds files during editing processes in eR Plugin for seamless document management.



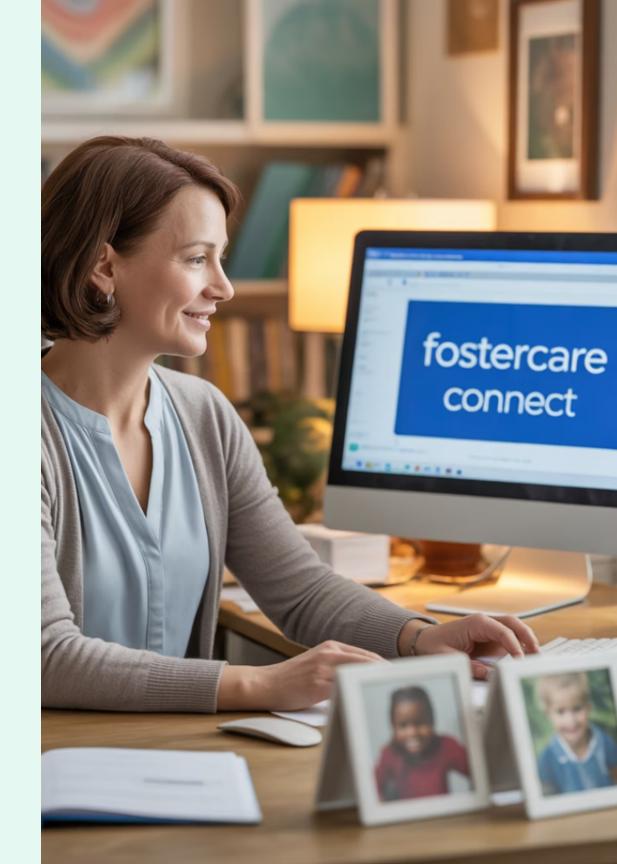
Inbox Creation

If you selected "Create and link Inbox" during setup, an inbox will automatically be created when you save the User ID.

Foster Care - Adding a Staff Profile

This presentation will guide you through the process of adding a Staff Profile in the extendedReach system. We'll cover an introduction to staff profiles, an overview of what they contain, security requirements, and the step-by-step process to create a new staff profile.

by Emily Parks



Introduction

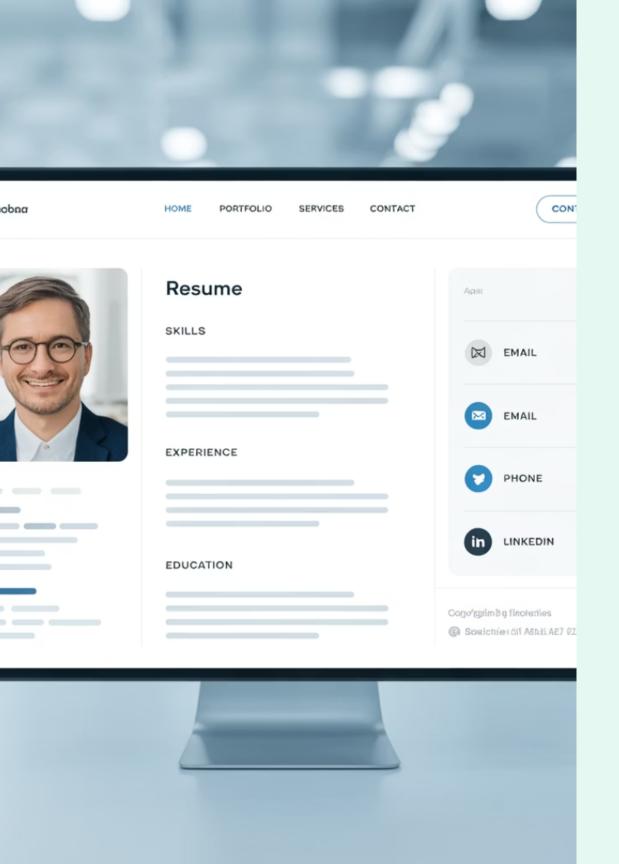
Purpose

This article is meant to assist you with adding a Staff Profile.

Support

If you have a question not addressed here, contact support at support@extendedreach.com.







Overview of the Staff Profile



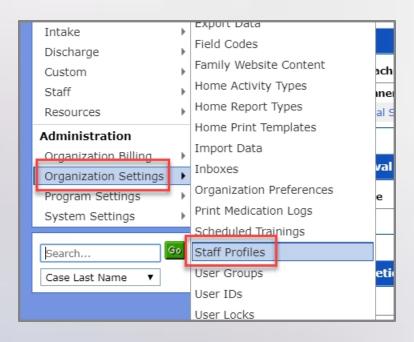
What is a Staff Profile?

When a new employee's role includes working with cases, this employee will require a Staff Profile. A Staff Profile is essentially a professional record that collects information such as: signature, credentials, phone numbers, hire date, and other information.



Implementation Order

ALWAYS start with the User ID so the system creates the Staff Profile and Inbox automatically



Adding a Staff Profile Security Level Requirements and Access



Administrator Access Required

You must be an Agency Administrator to access "Administration" on the left side of your Workspace.

Navigate to Organization Settings

Go to "Organization Settings" in the Administration menu.

Access Staff Section

Click on "Staff" to access staff management functions.

3 Steps to Creating a New Staff Profile



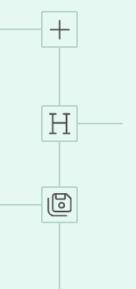


Within Staff, click on "Add Staff"

Begin the process by clicking the Add Staff button in the Staff section.

Press SAVE to complete Adding a Staff Profile

After filling in all required information, save the profile to complete the process.



Within the General screen, complete the fields

Required fields are highlighted, while optional fields are not.

Complete sections for "General Information", "Personal Information", "Emergency Contact", and "Signature".



Staff Profile Field Descriptions





Status

Leave status "Active" if staff is currently employed. For more information on "Inactivating" Status, please see Deleting a User/Employee Leaves Agency in Related Articles.



User ID

This is where you can link this Staff Profile to an existing User ID. For more information on Adding a User ID, please see Related Articles.



Termination Date

Click on small calendar icon to open calendar. Select date of termination from the calendar.



Agency

This should pre-fill with your agency name.



Supervisor

You can select which supervisor, if any, will supervise this staff member.



Type

You can access the drop-down menu to select the staff type.



Intake Worker

Check this box if this Staff Profile is for an Intake Worker only, indicating that this worker is only doing intakes so they will not be counted as a caseworker change in the stats.



Does Not Perform Casework

Check this box if this Staff member will NOT be performing casework. This means the staff will not be available on the drop-down menu to complete activities and reports for homes and cases.





Completing the Staff Profile



Complete All Fields

Ensure all required fields are filled in correctly



Double-check all entered information for accuracy

Press SAVE

Press SAVE to complete Adding a Staff Profile

Removing Employee Access from extendedReach: A Step-by-Step Guide

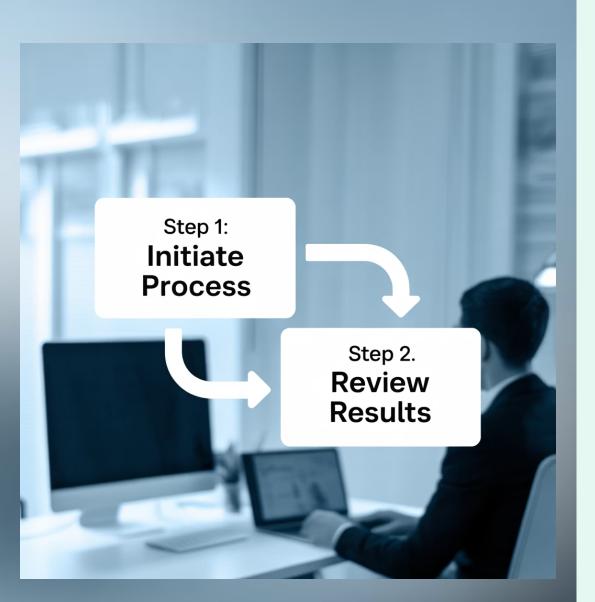
Proper offboarding is crucial for maintaining data security and system integrity when an employee leaves your agency. This guide will walk you through the essential steps to ensure departing staff members can no longer access your extendedReach system while preserving their work history for compliance and record-keeping purposes.

As an Agency Administrator, you'll learn the complete process from removing login credentials to updating staff records, helping you maintain control over your sensitive information and comply with security best practices.









Understanding the Two-Step Process

2

1

Critical Steps

Security Level

Required to completely remove system access

Agency Administrator access required

100%

Protection

Complete system lockout when properly executed

When an employee departs from your agency, you must complete both steps of the offboarding process to ensure complete system security. First, deleting their User ID immediately prevents any further system access. Second, marking their Staff Profile as inactive preserves their work history while removing them from active assignments and approvals.

Only users with Agency Administrator privileges can perform these actions, as they require access to the Organization Settings section under Administration in your workspace. Completing both steps ensures 100% protection against unauthorized access while maintaining your historical records.

Accessing Administrative Controls



Navigate to Administration

Log into extendedReach

Use your Agency Administrator credentials to access the system with full administrative privileges.

Locate and click on the "Administration" option in the left navigation panel of your workspace.

Select Organization Settings

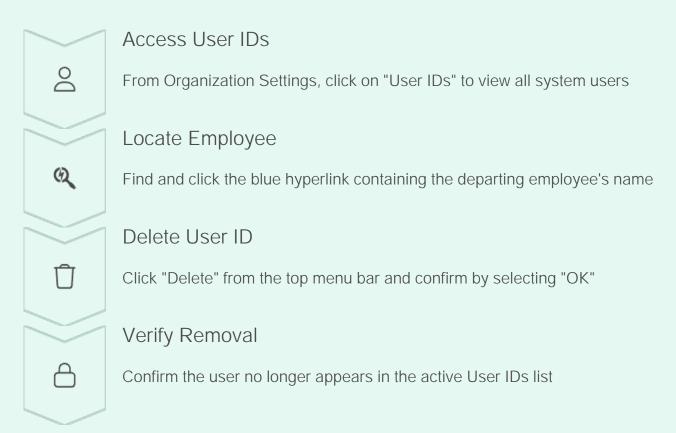
Click on "Organization Settings" to access user management functions and begin the employee removal process.

To begin the process of removing an employee's access, you'll need to navigate to the administrative section of extendedReach. This area contains the tools necessary for managing user accounts and staff profiles, but is only accessible to users with Agency Administrator security clearance.

The Organization Settings section serves as your central hub for all user management tasks, including both steps of the employee removal process: User ID deletion and Staff Profile deactivation. Ensuring you have the proper access before beginning will prevent frustration and delays in completing this critical security task.



Step 1: Deleting the User ID



Deleting the User ID is the first critical step in removing system access. This action immediately prevents the departing employee from logging into extendedReach, effectively locking them out of all system functions and sensitive data. The process is straightforward but requires careful attention to ensure you're selecting the correct user account.

Confirming User ID Deletion



Immediate System Lockout

Once the User ID is deleted, the employee can no longer log into extendedReach with their credentials, providing immediate security protection.

Verification Process

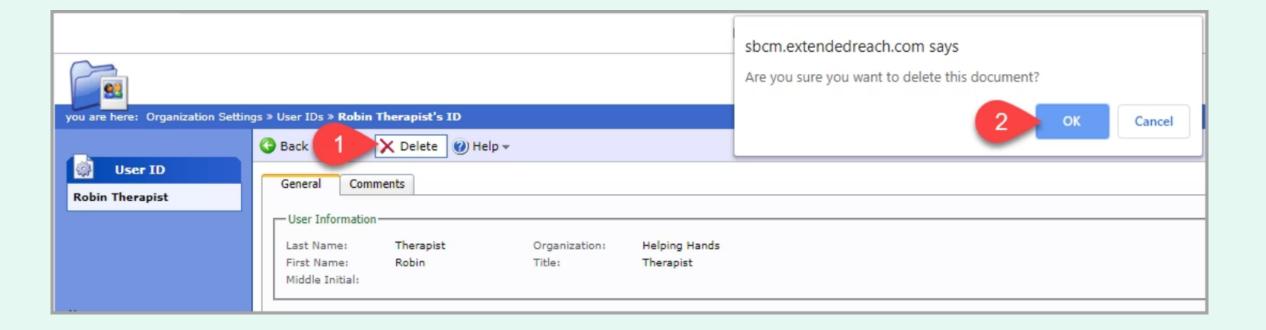
After deletion, return to the User IDs list to verify the employee's name no longer appears among active users in your system.

Deletion vs. Deactivation

User ID deletion is permanent and cannot be undone. If the person might return to your agency in the future, consider consulting with your IT department about alternatives.

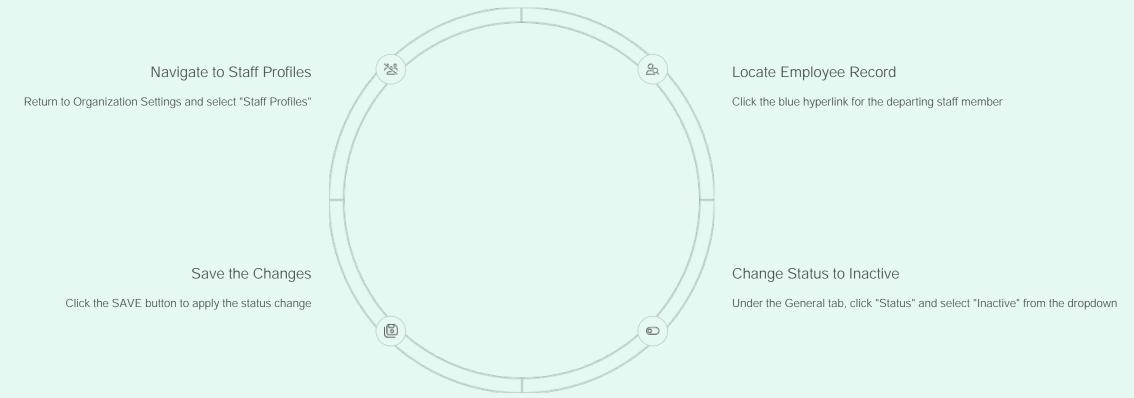
When you delete a User ID, the system will display a confirmation dialog to ensure this intentional action isn't performed accidentally. This step is irreversible, so verify you're working with the correct user record before proceeding. After clicking "OK" on the confirmation prompt, the system will process the deletion and return you to the User IDs list.

The first security gate is now closed, but you must still complete the second step to ensure the employee is fully removed from active assignments and approval workflows within the system.



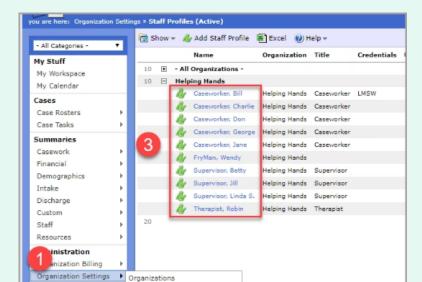
Step 2: Inactivating the Staff Profile





While deleting the User ID prevents system access, inactivating the Staff Profile ensures the employee no longer appears in active workflows, assignments, or approval processes. This critical second step maintains the integrity of your historical records while removing the employee from day-to-day operations.

By marking the profile as inactive rather than deleting it, you preserve all the employee's historical work, notes, and case activities for auditing and compliance purposes. This approach supports proper documentation while ensuring the departed employee is no longer assigned to active work.



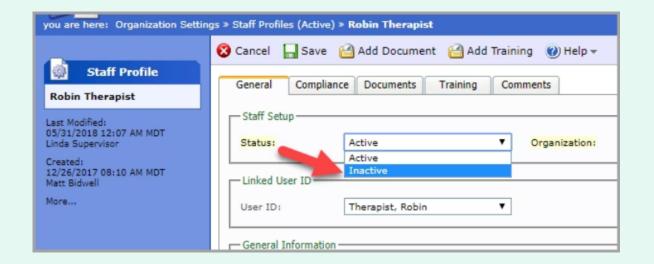
Completing Staff Profile Inactivation





After setting the employee's Staff Profile to "Inactive" and saving the change, the system will update their status throughout extendedReach. The interface will refresh to display the updated profile with its inactive status clearly indicated. This change preserves all historical information while preventing the profile from appearing in active staff selections throughout the application.

The benefit of this approach is that you maintain complete records of the employee's work while ensuring they don't appear in dropdown menus for new assignments, approvals, or other active workflows. This status change completes the second phase of properly removing employee access from your system.



Final Verification and Reassignment





Verify Both Steps Are Complete

Confirm both User ID deletion and Staff Profile inactivation have been successfully completed.



Check Active Assignments

Review cases and homes to identify any still assigned to the departed employee.



Reassign Open Cases

Transfer any active cases or homes to current staff members to ensure continuity of service.



Document Completion

Record the access removal and reassignments in your offboarding documentation for audit purposes.

After completing both steps of the access removal process, it's essential to verify the employee is no longer assigned to any active cases or homes. These lingering assignments could cause confusion or delays in service if not properly transferred to current staff members. Navigate to any cases or homes previously managed by the departed employee and reassign them to appropriate active staff.

This final verification step ensures complete removal of the employee from all system functions while maintaining service continuity for your clients. For compliance and security audit purposes, document the completion of all steps, including the date of access removal and case reassignments. If you encounter any issues during this process, contact extendedReach Support at support@extendedreach.com for assistance.



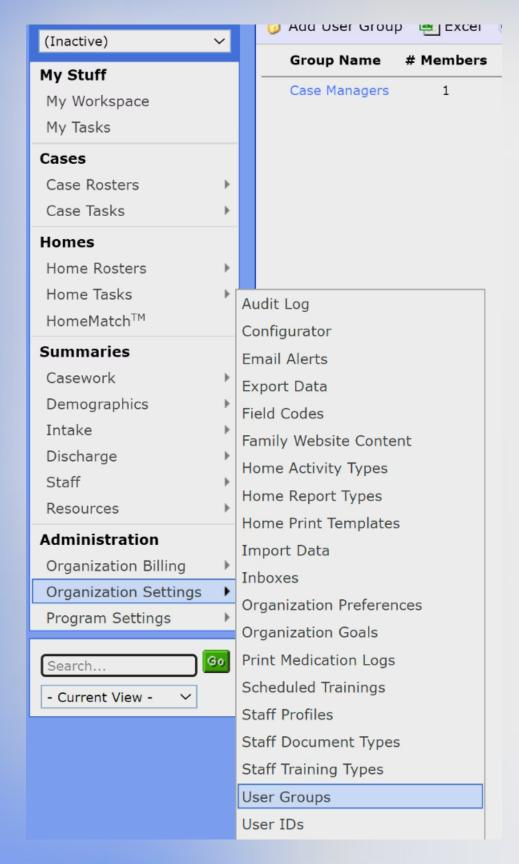


Simplifying User Management: Foster Care User Groups in extendedReach

Welcome to extendedReach's comprehensive guide to User Groups in Foster Care. This presentation will walk you through how to effectively manage user permissions across your agency using security groups, saving you valuable time and ensuring consistency in user access controls.



by Emily Parks



Why Use Security Groups?





Time-Saving Management

Change permissions for multiple users at once instead of making separate changes for each individual user ID



Consistent Security

Ensure standardized access rights for similar roles across your organization



Role-Based Access

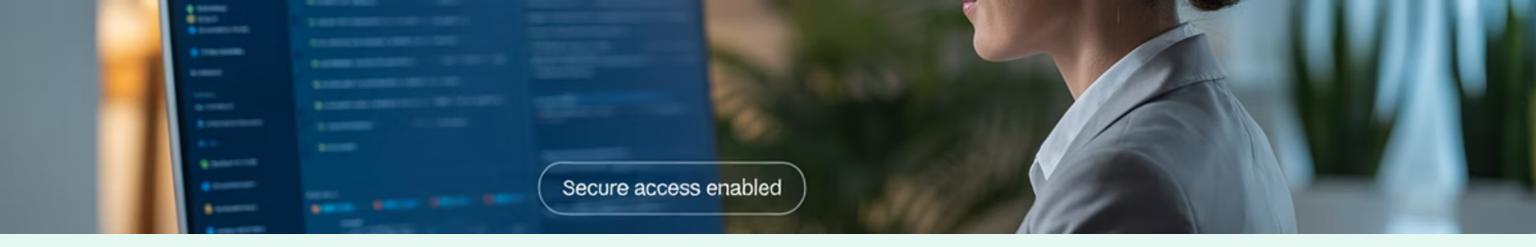
Create specific permission sets based on staff roles (e.g., "Staff," "Supervisors," "Leadership")



Centralized Control

Maintain and update permissions from a single location for better oversight

Security Groups are particularly valuable for larger agencies where manually configuring individual user permissions would be time-consuming and error-prone.



Enabling Security Groups

Plan Your Group Structure

Before enabling, consider the types of users in your agency and what permissions each role should have. Think about group names like "Staff," "Supervisors," and "Leadership."

Access Organization Preferences

Hover over Organization Settings in your workspace menu and click "Organizational Preferences" to begin.

Edit Settings

Navigate to the Settings tab and click the "Edit" button at the top of the screen to make changes.

Enable the Feature

Scroll down to Additional Settings and check the box next to "Enable User Security Groups" to activate this functionality.

Note that you must be an Agency Administrator to enable and configure security groups in the system.

Creating User Security Groups



Access User Groups

After enabling the feature, find "User Groups" under Organization Settings in your workspace menu.

Add a New Group

Click on "Add User Group" to begin creating a new security group profile.

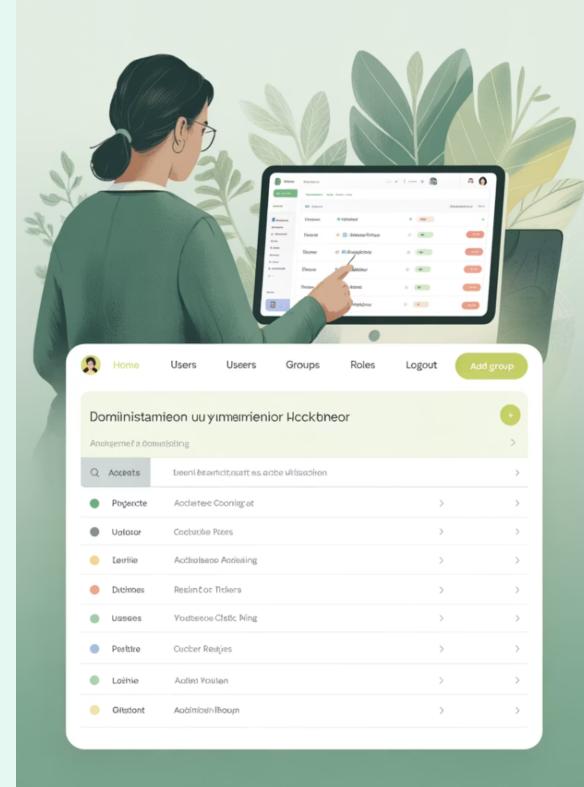
Configure Group Information

Enter a descriptive name and detailed description for the security group that clearly identifies its purpose.

Set Security Rights

Check the appropriate boxes to configure which specific permissions members of this group will have in the system.

When setting up security groups, consider creating a hierarchy that allows for appropriate access based on staff responsibilities and roles within your organization.



Managing Security Group Settings



Security Rights Configuration

The Security Rights section allows you to define specific permissions for the group. These include:

- Case management capabilities
- Document access and editing rights
- Report generation permissions
- Financial information access
- System administration capabilities

Review these settings carefully to ensure they align with the role responsibilities of group members.

Accessing Group Management

To view or modify existing groups:

- 1. Navigate to Organization Settings
- 2. Click on "User Groups"
- 3. Select a blue hyperlinked group name
- 4. Click "Edit" to make changes
- 5. Save your modifications

This interface provides a quick overview of all user groups, including member count, descriptions, and when each group was last modified.

Remember that changes to a security group affect all users assigned to that group, so consider the impact before making modifications.



Assigning Users to Security Groups



Access User ID

Navigate to the user's profile that you want to assign to a security group and click "Edit" to modify their settings.

Locate Security Rights

Scroll down to the Security Rights section within the user profile to view current permissions and group assignments.

Select Security Group

Use the dropdown menu to choose the appropriate security group for the user based on their role and responsibilities.

Custom Permissions

If a user needs unique permissions, select "No Group Assigned" to customize their individual access rights outside of the group structure.

When you assign a user to a security group, their individual permission settings become locked based on the group's configuration, ensuring consistency across similar roles.

Best Practices for Security Groups



Limit Group Number

Create only as many groups as necessary to maintain simplicity while addressing your organization's needs.

Regular Reviews

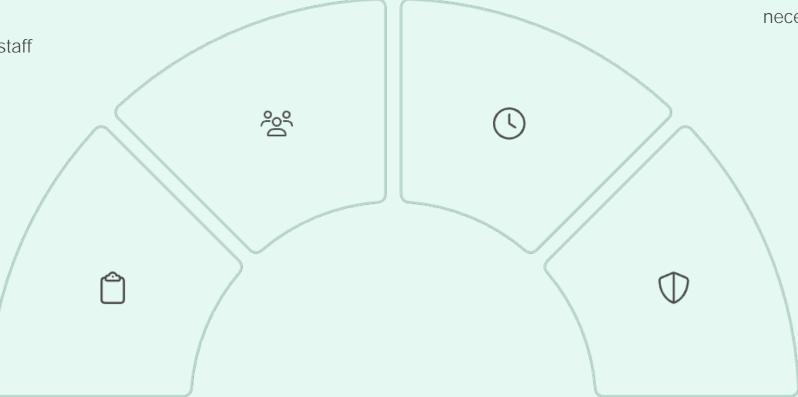
Schedule periodic reviews of security groups to ensure they remain aligned with your organization's evolving requirements.

Principle of Least Privilege

Assign only the minimum permissions necessary for users to perform their job functions effectively.

Document Your Structure

Create clear documentation that outlines each security group's purpose, permissions, and which staff roles should be assigned to it.



Effective security group management balances operational efficiency with appropriate access controls to protect sensitive client information.

Restricting Access to Activities and Reports in extendedReach

extendedReach offers powerful controls to protect sensitive information within the system. This presentation will guide system administrators through the process of configuring user access restrictions to ensure confidential case information is only visible to authorized personnel. You'll learn how to implement security settings at both individual and group levels to maintain compliance with privacy regulations.

by Emily Parks





Understanding Confidential Information Protection



What Can Be Protected

Case notes, file attachments, and specific activity types can be restricted based on user permissions, ensuring sensitive client data remains confidential.

Who Needs Protection

Client medical information, therapy notes, legal documents, and other sensitive personal data often require additional security controls beyond standard permissions.

Benefits of Restrictions

Properly configured access controls help maintain client privacy, ensure regulatory compliance, and provide appropriate information access based on staff roles.

With extendedReach's confidential information settings, you can create a secure environment that respects both client privacy and operational needs while maintaining appropriate access for authorized staff.



Enabling System-Wide Confidentiality Settings



Access Organization Preferences

Navigate to System Administration > Organization Settings > Organization Preferences from the side menu to begin the configuration process.

Locate Security Settings

Click on the "Settings" tab within Organization Preferences to find the confidentiality options available in the system.

Enable Confidentiality Protection

Check the box for "System: Hide confidential information (case notes and file attachments) from staff not associated with case/home" to activate the protection.

Save Configuration

Click "Save Settings" at the bottom of the page to apply this system-wide configuration change and enable the foundation for confidentiality controls.

Once this master setting is enabled, you can begin configuring specific access permissions for individual users and groups within your organization.

Configuring Individual User Access Restrictions



Access User Management

Navigate to System Administration > User Management > User ID, then select the specific user whose permissions need to be restricted.



Locate Permissions Section

Within the user's profile, click on the "Permissions" tab to access the security settings for that specific user account.



Configure Access Restrictions

Scroll to "Activity/Report Restrictions" and select the specific activities and reports that should be restricted for this user.



Save User Permissions

Click "Save" at the bottom of the page to apply these restrictions to the user's account immediately.

Individual user configurations allow you to create custom access profiles that match each staff member's specific role and responsibilities within your organization.



Setting Up User Group Restrictions

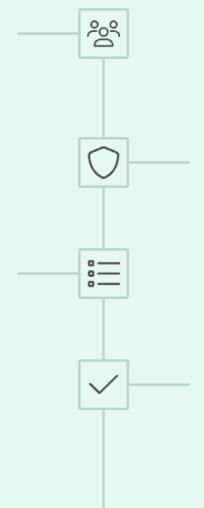


Access User Groups

Navigate to System Administration > User Management > User Groups, then select an existing group or create a new one for staff with similar access needs.

Select Restricted Activities

In the "Activity/Report Restrictions" section, check the boxes for each activity and report type that should be restricted for all users in this group.



Configure Group Permissions

Click on the "Permissions" tab within the group profile to access the security settings that will apply to all members of this group.

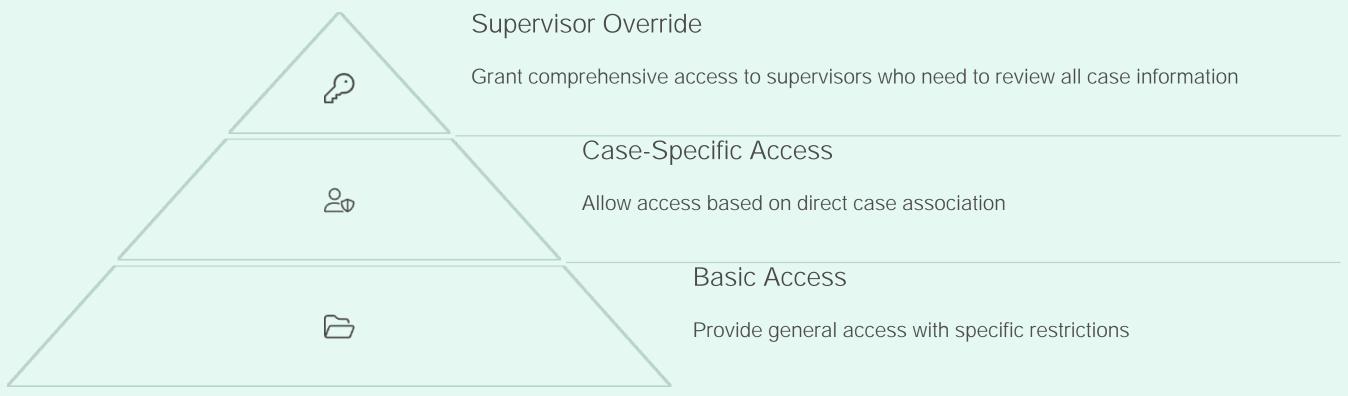
Apply and Test Settings

Save the configuration and test the restrictions by logging in as a group member to verify that the appropriate restrictions are in place.

User groups streamline administration by allowing you to apply consistent security policies to multiple staff members who share similar roles and responsibilities.



Granting Access to Confidential Information



For system administrators and supervisors who need full access, enable these two critical permissions in their user profile: "Access confidential information for all cases" and "Access confidential information for all homes." These permissions override the restrictions and grant complete visibility across the system while maintaining the protection for other users.



System Testing for Access Controls

Thorough system testing is crucial to validate access control implementations across the extendedReach platform. Employ these specialized testing methodologies to ensure security integrity: integration testing to verify interactions between system components, role-based testing to confirm proper permission enforcement, penetration testing to identify potential vulnerabilities, load testing to assess performance under stress, and regression testing to ensure updates don't compromise existing security measures. Implementing a comprehensive system testing strategy helps prevent unauthorized access and maintains data confidentiality throughout the application.

Best Practices for Managing Access Restrictions



Regular Access Audits

Conduct quarterly reviews of user and group permissions to ensure they remain appropriate as staff roles change within your organization.



Staff Training

Provide comprehensive training on confidentiality policies and the importance of information security when onboarding new staff.



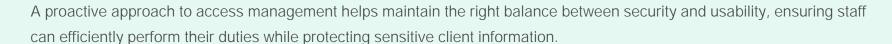
Layered Security

Implement multiple security measures, including access restrictions, strong password policies, and two-factor authentication.



Documentation

Maintain detailed records of your access control policies and the rationale behind specific restrictions for compliance purposes.





Managing Staff Training and Documentation in extendedReach

Effective staff training management is critical for foster care agencies to maintain compliance and ensure quality service delivery. This presentation will guide you through extendedReach's powerful tools for tracking staff training and documentation, helping you create standardized processes that meet regulatory requirements while supporting professional development.





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Overview of Staff Compliance Tracking





Centralized Documentation

Track all mandatory and optional staff training in one location with automatic expiration alerts



Regulatory Compliance

Ensure staff meet all required certifications and training hours with customizable tracking



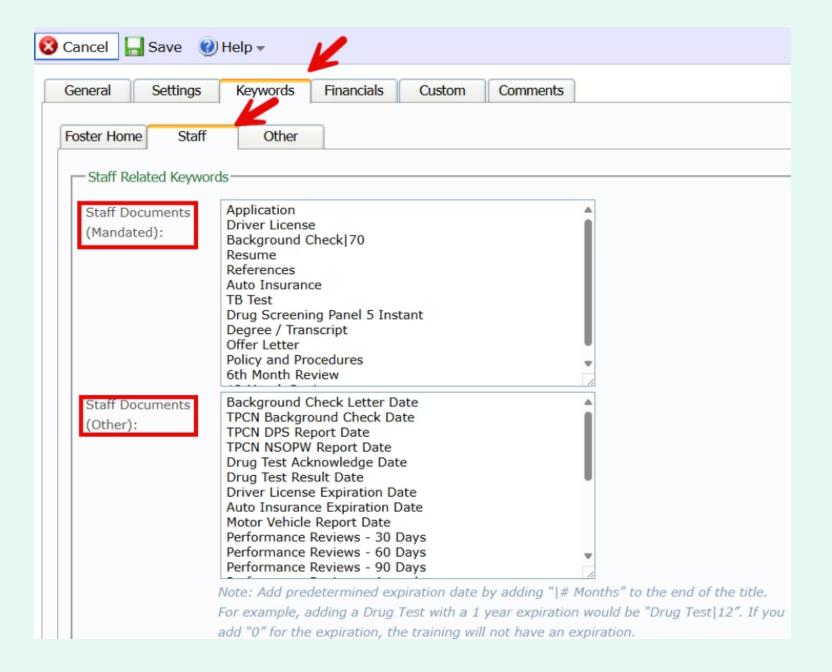
Role-Based Access

Different permission levels allow administrators to manage records while giving staff appropriate visibility

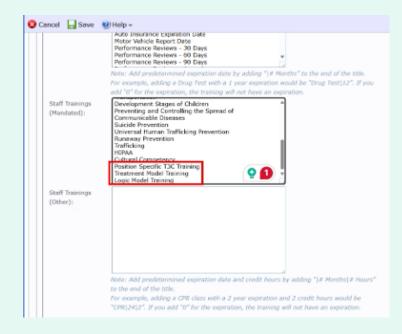


Reporting Capabilities

Generate compliance reports to monitor organizational training status and identify gaps







Configuring the Staff Compliance Checklist





Access Organization Preferences

Navigate to Organization Preferences in the System Administration section



Select Keywords Tab

Click on the Keywords tab and then the Staff sub-tab to access compliance settings



Configure Document and Training Lists

Add required documentation and training items to either Mandated or Other categories

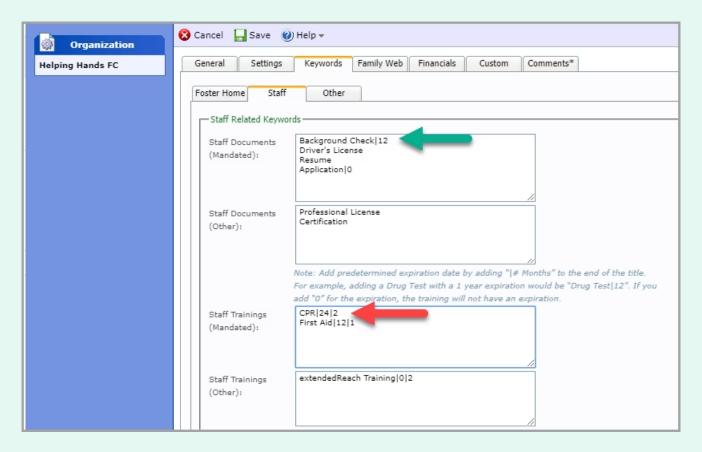


Save Configuration

Click Save to implement your customized compliance checklist for all staff profiles

Setting Up Predetermined Training Parameters





Syntax Format

Use the special format "Training Name|Months Valid|Hours" to standardize requirements

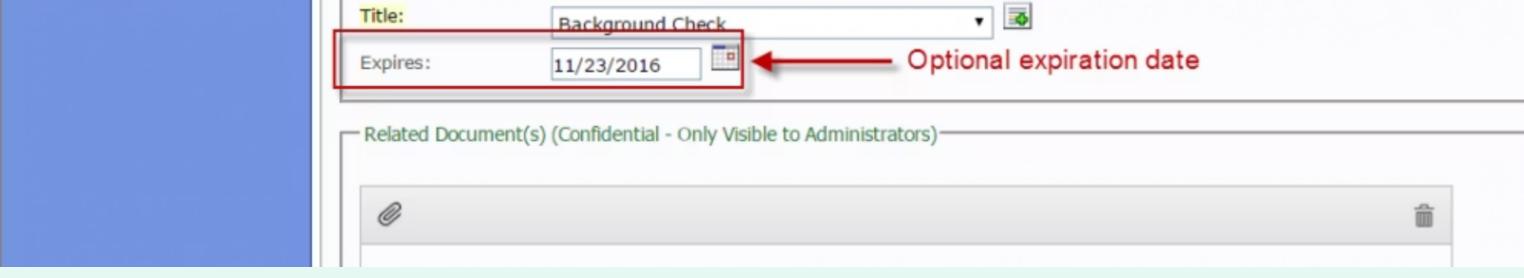
For example: "CPR|24|2" creates a CPR training that expires after 24 months and counts as 2 training hours

For documents without training hours: "Background Check|12"

For non-expiring training: "Cultural Diversity|0|3"

Benefits of Predefined Parameters

- Ensures consistency across all staff records
- Prevents data entry errors in expiration dates
- Automatically calculates total training hours
- Simplifies compliance monitoring
- Reduces administrative overhead



Adding New Staff Documents

Access Staff Profile

Navigate to the Staff Directory and select the staff member's profile to open their record

Initiate Document Creation

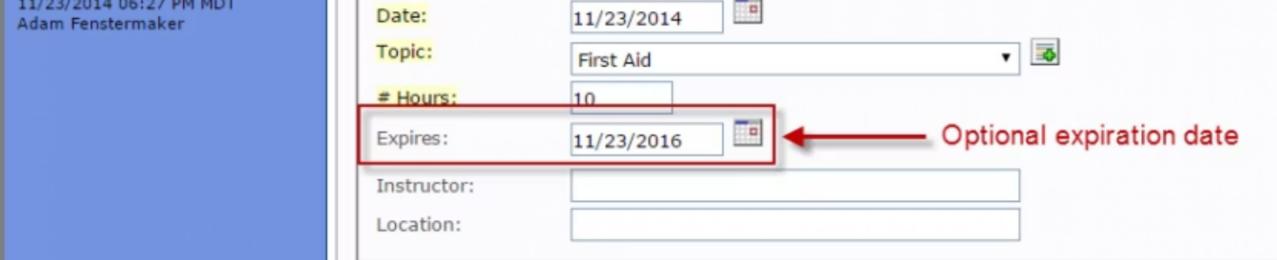
Click the "Add Document" button to open the document creation form

Complete Document Details

Select a document title from the dropdown or add a new type. Enter the expiration date if applicable and attach relevant files using the paperclip icon

Save and Review

Click "Save" to store the document. The entry will appear on the Documents tab and, if mandated, will also appear on the Compliance tab



Adding New Staff Training Records

Step 1: Access Staff Profile

Navigate to the Staff Directory and click on the name of the staff member to access their profile

Step 3: Enter Training Details

Select the training topic or add a new one, enter the completion date, expiration date (if applicable), and training hours. Attach certificates or other documentation

Step 2: Add Training Record

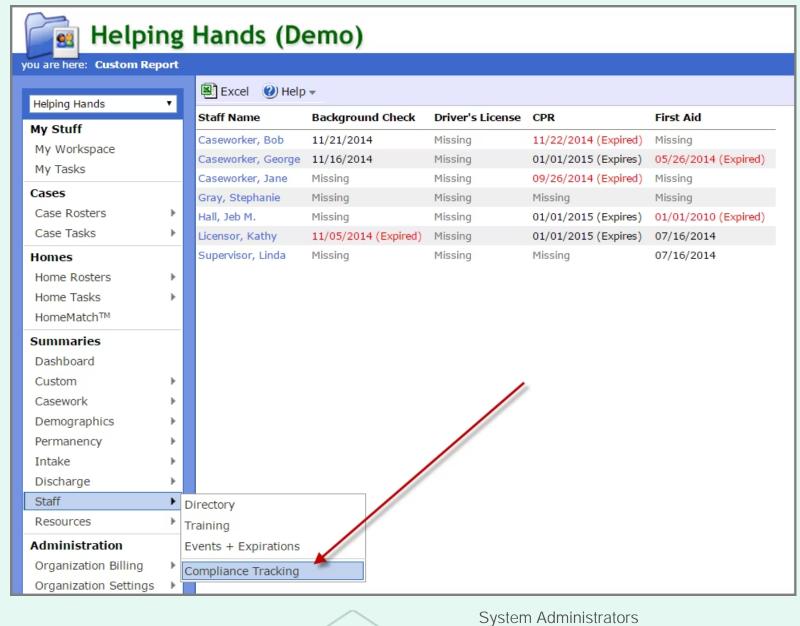
Click the "Add Training" button to open the training creation form

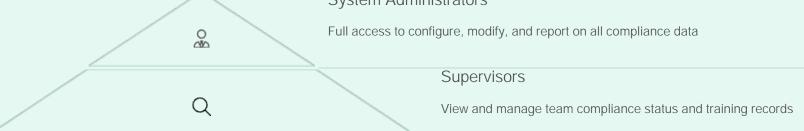
Step 4: Save and Verify

Click "Save" to store the training record. The entry will appear on the Training tab and, if mandated, will also show on the Compliance tab

Staff Access to Compliance Information









Advanced Staff Training Management

Implementing a comprehensive staff training management system in extendedReach delivers multiple organizational benefits. As shown in the chart, regulatory compliance represents the largest impact area at 35%, followed by improved staff development at 25% and enhanced risk management at 20%. The system also increases documentation efficiency (15%) and provides valuable reporting capabilities (5%) for continuous improvement.





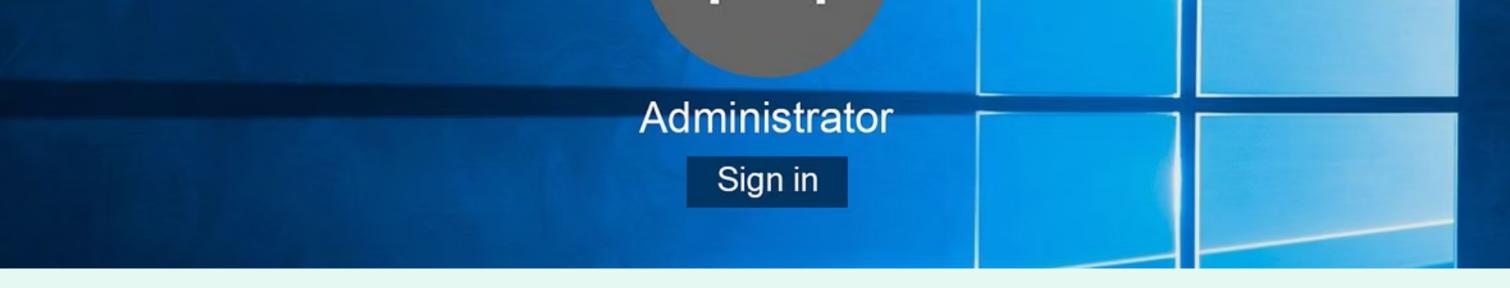
Configuring Advanced Staff Documents and Trainings in extendedReach

Welcome to our comprehensive guide on enabling and configuring Advanced Staff Documents and Trainings in extendedReach. This powerful feature allows case managers and system administrators to build customized training modules and document templates within the system, significantly improving staff development tracking and compliance management.

Throughout this presentation, we'll walk through the step-by-step process of setting up this functionality, explore the various field types available for custom forms, and provide best practices for implementation. Whether you're new to extendedReach or looking to enhance your current setup, this guide will help you optimize your staff training management.



by Emily Parks



Getting Started: Prerequisites



User Permissions

You must have an extendedReach User ID with Full Administrator permissions to access and configure these features.



System Access

You'll need access to the System Administration area within your extendedReach environment.



Planning

Before configuring, identify what types of training documents and categories your agency needs to track.



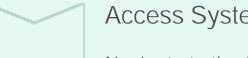
Browser Requirements

For best results, use a modern browser like Chrome or Edge with the extendedReach plugin installed if you'll be working with Word documents.



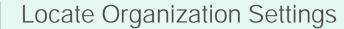
Enabling Advanced Staff Documents and Trainings





Access System Administration

Navigate to the System Administration section through the side menu of your extendedReach dashboard.



Find and select the "Organization Settings" option from the administration menu.



Within Organization Settings, find the Staff Documents/Training section and toggle the feature to "Enabled".

Save Configuration

Click the "Save" button to apply your changes. The system will confirm successful activation.



Д_©







Understanding Custom Form Field Types

Text Entry Fields

- Single Line Text: For brief responses
- Paragraph: For longer text entries
- Number: For numerical data only

Selection Fields

- Dropdown: Single selection from a list
- Checkboxes: Multiple selections allowed
- Multiple Choice: Radio-button style selection

Special Fields

- Date & Time: For scheduling information
- Signature: Electronic signing capability
- Treatment Goals: Links to client records

When designing your forms, combine these field types strategically to create intuitive and efficient data collection tools. Consider the information you need to gather and choose the most appropriate field type for each item.

Building Your First Staff Training Form



Access Form Builder

Navigate to System Administration > Activity Types > Staff Document/Training section to access the form builder interface.

Create New Form

Click "Add New" to create a fresh form template. Provide a descriptive name that clearly identifies its purpose (e.g., "Annual Ethics Training Certification").

Add Form Elements

Use the field type menu to add different elements to your form. Start with section breaks to organize content, then add appropriate fields for data collection.

Configure Options

For each field, set relevant properties such as required status, help text, or predefined options for selection fields.

Save and Test

Save your form and create a test submission to ensure all fields work as expected before deploying it to your staff.

Creating Training Categories for Staff Compliance





Organizing your staff training into well-defined categories improves tracking efficiency and helps ensure compliance requirements are met. Create categories that align with both regulatory requirements and your agency's professional development goals. The compliance tab will automatically track completion rates and approaching deadlines for each category.

Implementing Approval Workflows

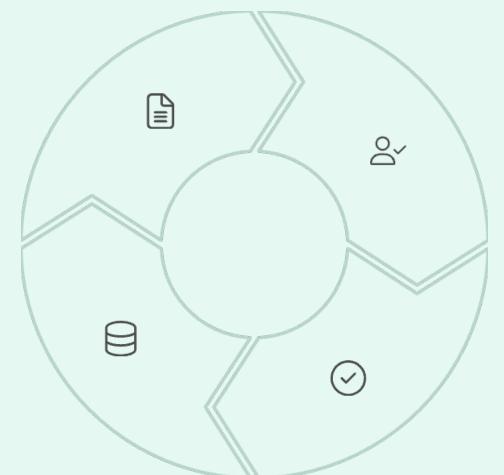


Document Submission

Staff member completes and submits training documentation



System updates compliance records upon approval



Supervisor Review

Supervisor receives notification and reviews submission

Approval/Rejection

Supervisor approves or requests corrections

Setting up effective approval workflows ensures quality control and creates accountability in your training process. Configure notifications to alert supervisors when new submissions require review, and set up automatic compliance updates when documents receive final approval.



Best Practices & Troubleshooting

Form Design Tips

- Keep forms concise and focused on essential information
- Use section breaks to organize content logically
- Include clear instructions for each field
- Test forms thoroughly before deployment

Common Issues

- Missing permissions preventing form access
- Form not appearing in staff compliance tab
- Required fields not properly marked
- Signature fields not working on mobile devices

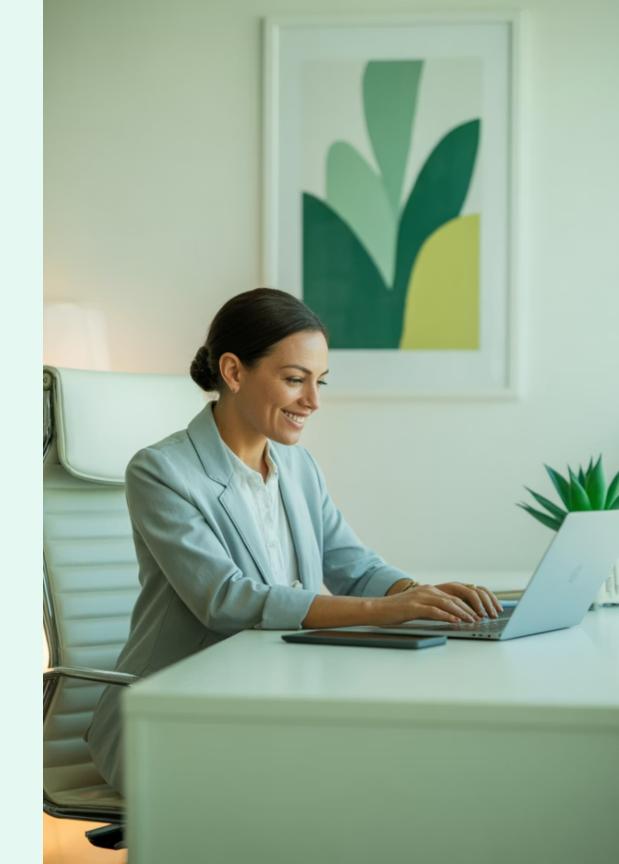
Ongoing Management

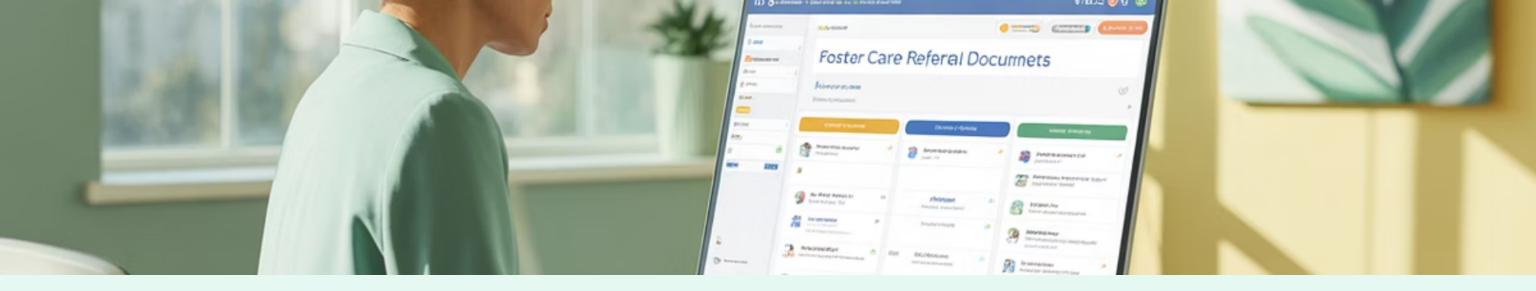
- Review form usage statistics quarterly
- Update training requirements as regulations change
- Collect staff feedback on form usability
- Archive obsolete training documents

Foster Care Case Referrals

Welcome to the extendedReach Help Center guide on Foster Care Case Referrals. This comprehensive resource will help you understand how to manage referrals in the extendedReach system, from creating new referrals to accepting or denying them, and converting them into cases.

by Emily Parks





Introduction to Case Referrals

This article is meant to assist you with Case Referrals.

What are Case Referrals?

Case referrals are potential foster care placements that your agency receives. The system allows you to track referred cases that you accept, reject, or keep in a pending status.

Why Use the Referral System?

Using the referral system helps your agency maintain accurate records of all potential placements, even those you don't accept, providing valuable data for reporting and analysis.

How Referrals Work

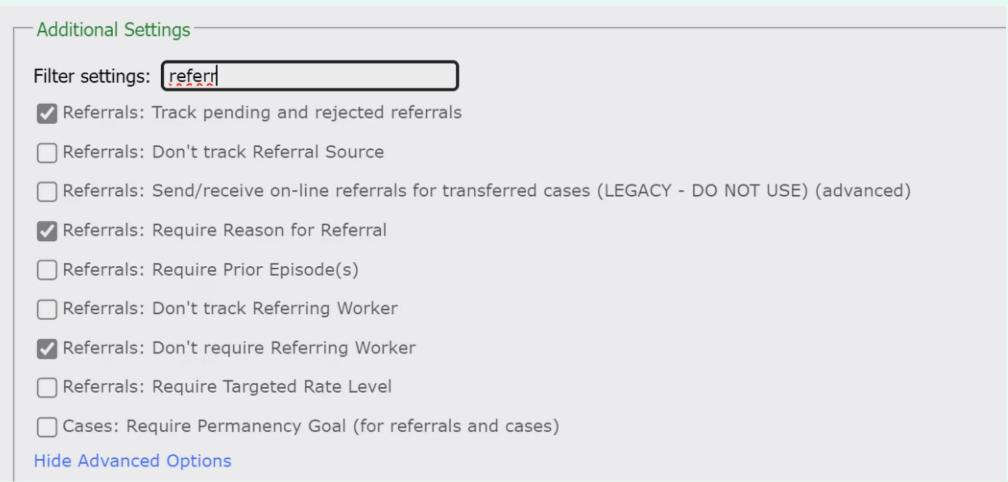
Referrals may arrive via phone, email, fax, or electronic transmittal through extendedReach. The system allows you to track all information and make informed decisions.

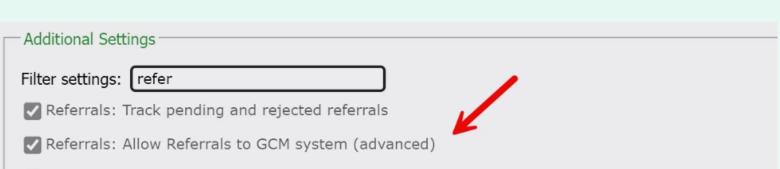
Referral Screen Layout



	Status
	Default is Pending - could be "Rejected" or "Accepted". Accepting a referral turns the referral into a case
	Program
	Program associated with this referral
	Funding Organization
	The name of the organization paying for foster care services
	Funding Case #
	Identifier assigned to this case by the funding organization
	Referral Source
	Where did the referral come from? This list of referral sources starts off empty and is "self-building". As you add new referral sources (using the "+" icon) the referral source will be added to the already deviation of the referral source.
	be added to the drop-down list for subsequent referrals
	Referring Worker
	Name of the worker who sent the referral to your agency
16.11	

If the status of the referral is "Pending" and a "Targeted Placement" has been identified, then the name of the pending referral will appear in the left column of the home screen as a "Targeted Placement".





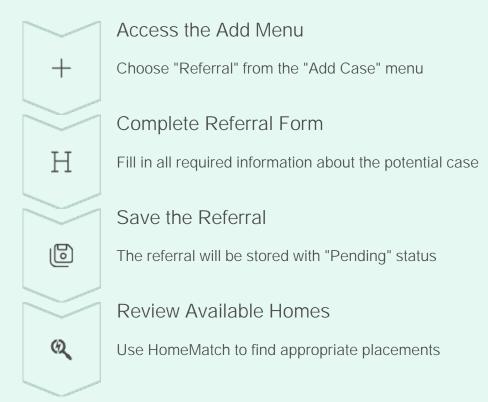


If "Referral" is not an option in the menu, you must contact your agency administrator to turn on the "Track Pending and Rejected Referrals" option in "Organization Preferences".





Creating a Referral



Your agency has the option of tracking referred cases that you accept, reject, or keep in a pending status. These referrals may arrive via phone, email, fax or electronical transmittal through extendedReach.

If "Referral" is not an option in the menu, you must contact your agency administrator to turn on the "Track Pending and Rejected Referrals" option in "Organization Preferences".

HomeMatch Tool





What is HomeMatch?

After you have entered a referral, you can open the referral in "read" mode where you will see links for available homes on the left column. This will use our HomeMatch system to search for homes based on sibling group size, gender, and age.

How to Use HomeMatch

- Open the referral in read mode
- Look for the "Available Homes" section in the left column.
- Review the automatically matched homes
- Click on a home to view more details

HomeMatch helps streamline the process of finding appropriate placements for children, saving time and ensuring better matches between children and foster homes.

Sibling Groups





Assign a Sibling Group ID

Siblings should be grouped by assigning them a unique "Sibling Group ID". Last names or court #'s make good sibling ID #'s. A Sibling Group links profiles, yet they are maintained separately.

Enter First Sibling Information

Complete all the required information for the first child in the sibling group.

Add Additional Siblings

To quickly add referrals for a sibling group, type in a Sibling Group ID then click "Add Sibling". By clicking on "Add Sibling", you will automatically save the profile you have just created.

This will copy much of the referral information and the Sibling Group ID to a new record, making it easier to enter multiple siblings while maintaining their connection in the system.

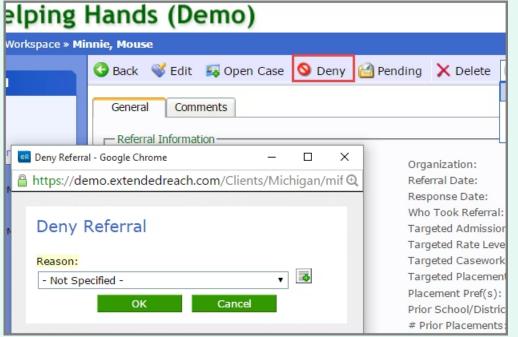
Accepting or Denying a Referral





Accepting a Referral

After you have entered your client as a referral, you can choose to accept the referral by clicking on the tabs at the top of the page. You can then change the status by clicking on "accept".



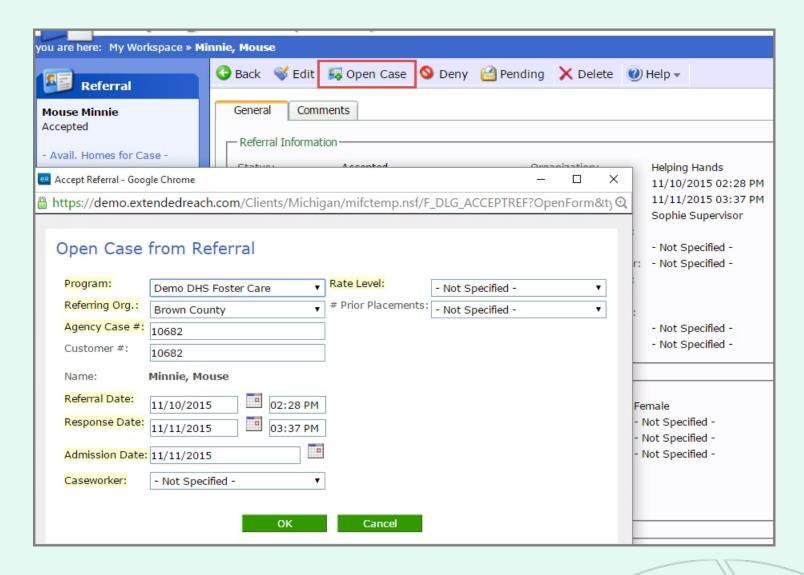
Denying a Referral

If you need to deny a referral, click on the "deny" option and select a reason from the dropdown menu. The "standard list" of denial reasons is controlled in your Organization Preferences.

If you deny a referral and type a new value not in the standard list (by clicking the "green plus" icon), that denial reason will remain in the drop-down for 6 months since its last usage. To remove non-standard reasons from the drop-down, change the non-standard reasons of denied referrals over the past 6 months to a reason from the standard list.

Opening a Case from a Referral





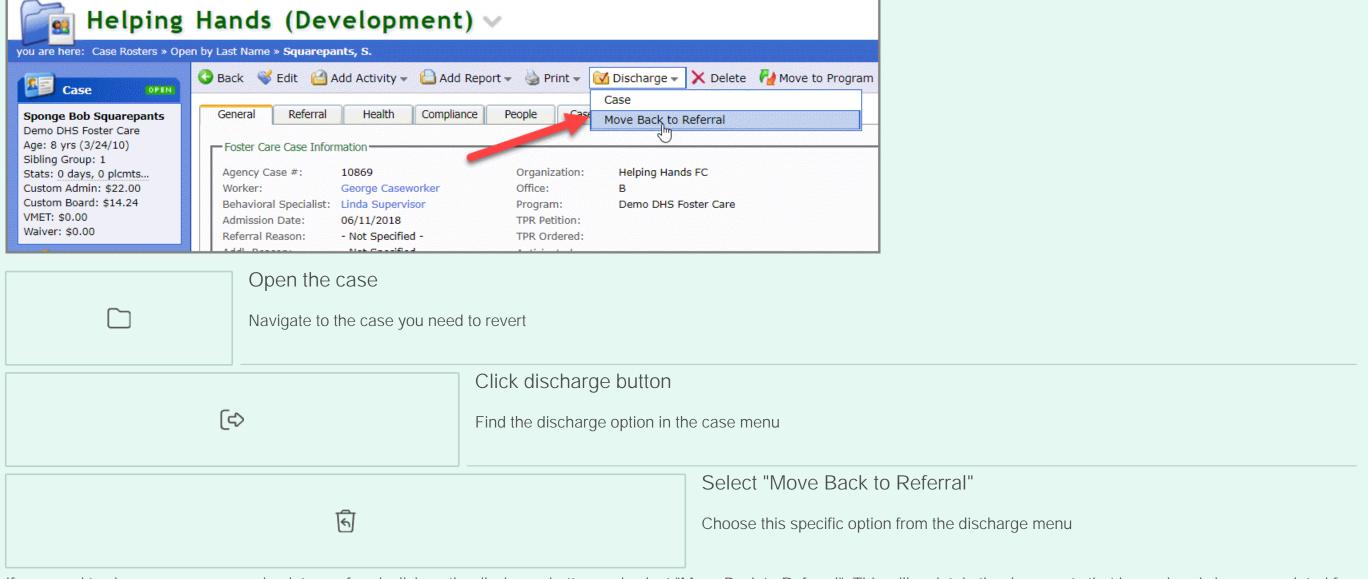


Make Decision

Determine if your agency can accept the client

Revert an Open Case to a Referral





If you need to change an open case back to a referral, click on the discharge button and select "Move Back to Referral". This will maintain the documents that have already been completed for the case.

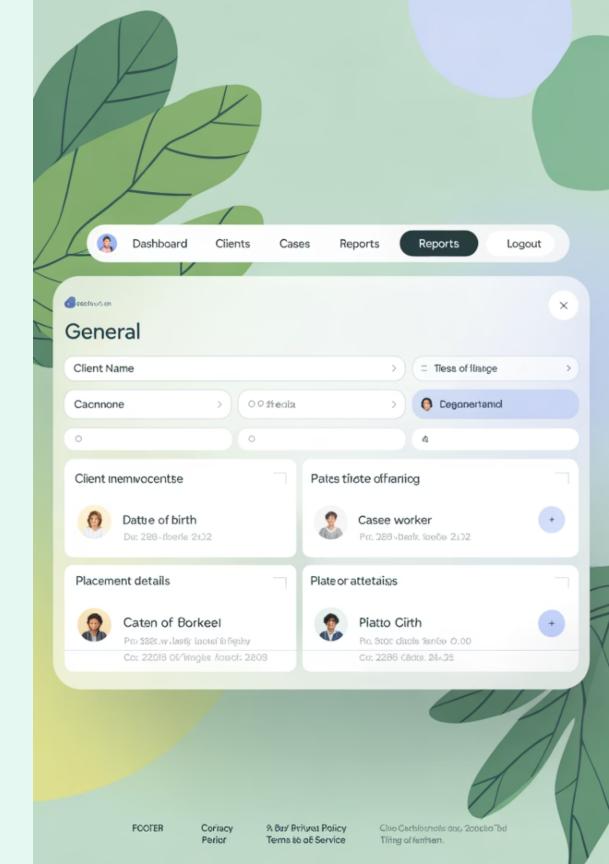
NOTE: This option is only available if the case was never placed in a home.

NOTE: If you have denied a referral for a client, don't reopen the referral. Rather, create a new referral with the new date and open that into a case.

Foster Care Case Screen: General Tab Guide

This comprehensive guide will help you navigate and effectively use the General Tab in the Foster Care Case Screen within extendedReach. The General Tab serves as the central location for essential case information, including client details, funding sources, and educational background. If you have questions not addressed in this guide, contact support at support@extendedreach.com.

by Emily Parks



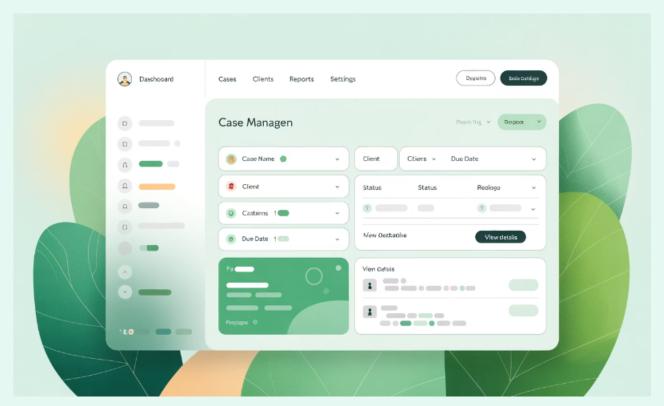
General Tab Layout Overview



Tab Structure

The General Tab is organized into several key sections that contain related information about the foster care case. Each section is designed to capture specific aspects of the case management process.

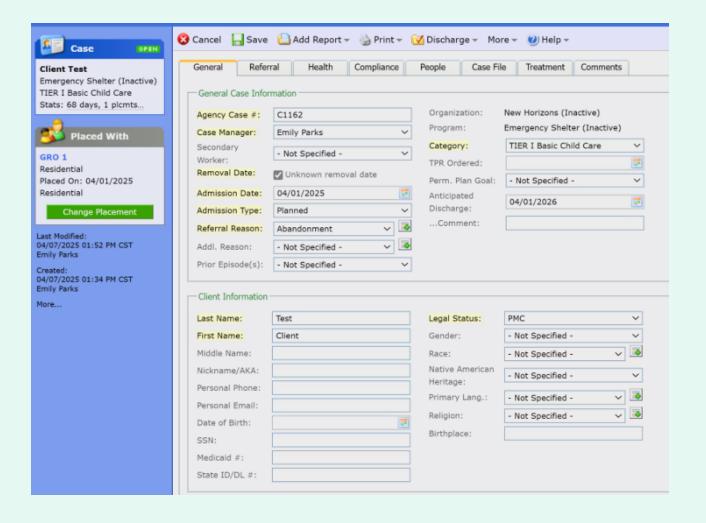
The layout is intuitive, with clearly labeled fields that guide you through the information entry process. Required fields are typically marked to ensure all necessary information is captured.



The General Tab provides a comprehensive overview of the case, allowing case workers to quickly access and update essential information without navigating through multiple screens.



General Tab



	2INgage	~			
County:	Bailey	~			
Rate Level:	YTBD	~			
Program Informat	ion				
Referring County:				PID #:	
New to DFPS Care	1:		,	Is Child Probation:	~
Child Qualifies for	Indian Child Welfare Act:		,		
Education					✓ 😼
Education					
			Grade:	Mark Consulficati	
School:			Graue.	- Not Specified -	<u> </u>
District:			Special Ed.:	- Not Specified -	<u> </u>
		u.F			
District:			Special Ed.:		
District: Enrolled: School Address:			Special Ed.: Teacher/Contact:		
District: Enrolled: School Address: School City:	Texas	~	Special Ed.: Teacher/Contact: School Phone:		
District: Enrolled:	Texas		Special Ed.: Teacher/Contact: School Phone: School Fax:		



Foster Care Case Information



Agency Details

This section includes the agency case number, assigned caseworker, and admission date. These fields help identify and track the case within your organization's system.

Referral Information

Document the primary and additional referral reasons that brought the child into care. This information is crucial for understanding the case background and planning appropriate interventions.

Legal Status

Track important legal dates including TPR (Termination of Parental Rights) petition filing and when TPR was ordered by the court. These dates are critical for permanency planning.

Organizational Structure

Identify which branch and program within your organization is responsible for the case, ensuring proper resource allocation and service delivery.

Child Information Section



The Child Information section serves as the demographic foundation for the case record. Accurate and complete information in this section is essential for proper identification, service planning, and reporting purposes. This information may also be required for funding and compliance requirements.



Funding Information

Primary Funding Organization

Select the main funding source responsible for covering the costs associated with the child's care.

Secondary Funding

If applicable, identify any additional funding sources that supplement the primary funding.

Rate Level Selection

Choose the appropriate rate level based on the child's needs and the services provided. Rate levels are configured in Program Settings > Program Rate Sheets.

Claims Payer Information

Specify the organization responsible for processing and paying claims related to the child's care.

If you don't see a specific funding organization or claims payer in the dropdown menus, contact support@extendedreach.com for assistance.

Education Information



School Enrollment Details

The Education section allows you to document the child's current educational placement and status. This information is crucial for ensuring educational stability and appropriate academic support.

Key fields in this section typically include:

- Current school name
- School district
- Grade level
- Enrollment status
- Special education services
- IEP (Individualized Education Plan) status



Maintaining accurate educational information helps case workers coordinate with schools, advocate for appropriate educational services, and track academic progress over time.

Regular updates to this section are important, especially when children change schools or advance to new grade levels.

Employment Information



Employment Status

Indicate whether the youth is currently employed, seeking employment, or not in the workforce.



Employer Details

Document the name of the employer, position held, and contact information for employment verification.



Work Schedule

Record the number of hours worked per week and typical schedule to help coordinate other services and appointments.



Income Information

Track earnings information to support financial planning and independence preparation for older youth.

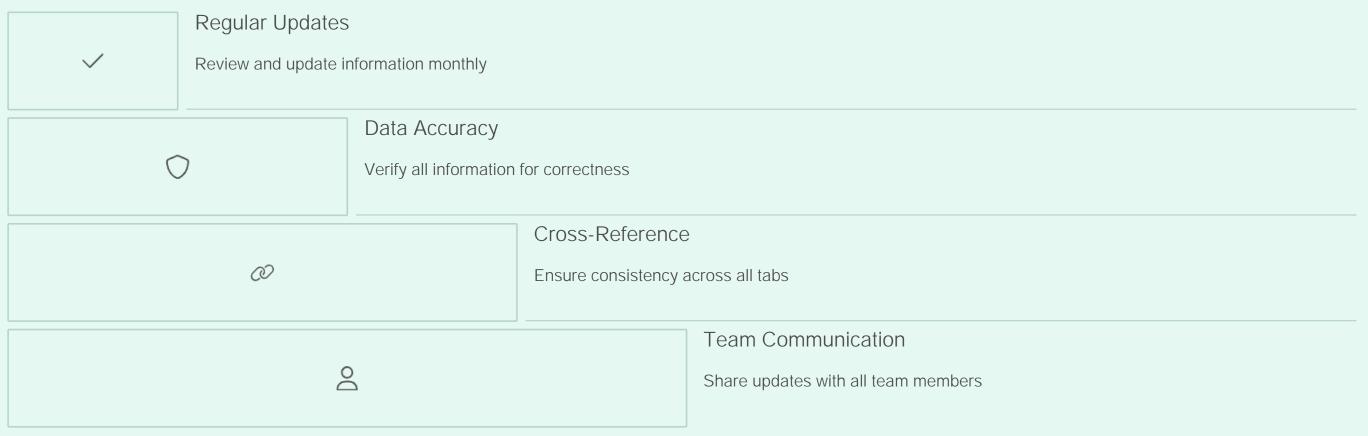
The Employment section is particularly important for older youth who are preparing for independence. Tracking employment history and skills development can support transition planning and help identify areas where additional support may be needed.



Best Practices for Using the

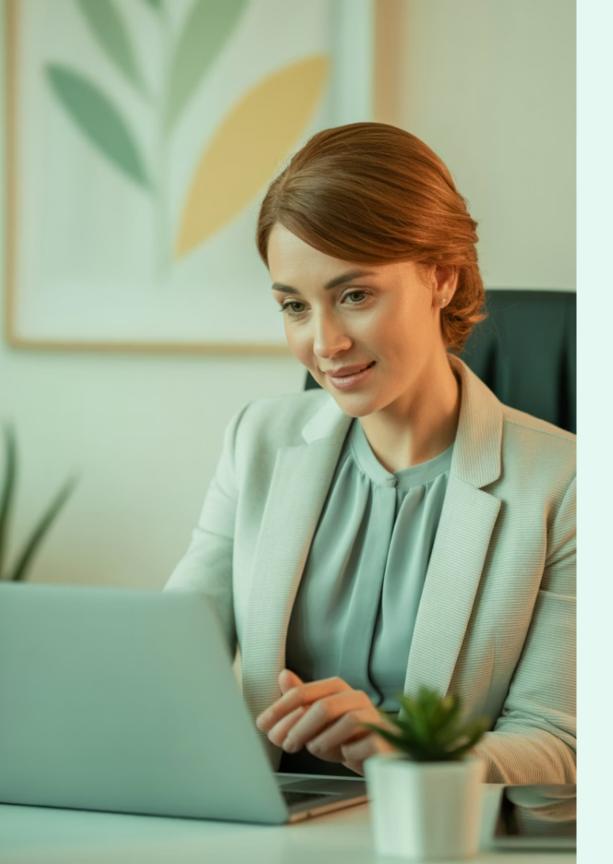
WHISPERING PINES

General Tab for T3C



The General Tab serves as the foundation for case management in extendedReach. Maintaining accurate and up-to-date information in this tab ensures that all team members have access to the essential details they need to provide effective services. Remember that information entered here may flow to other parts of the system, including reports and billing documentation, making accuracy particularly important. The General Tab holds many tools for tracking T3C requirements.

For more detailed information about other tabs in the Case Screen, refer to the related articles about the Financial Tab, Health Tab, People Tab, and other components of the extendedReach system.



Understanding the Health Tab in Foster Care Case Management



Welcome to our comprehensive guide for managing client health information in the Foster Care Case Management system. This presentation will walk you through the essential features of the Health Tab's Summary section, equipping you with the knowledge to efficiently track and manage critical medical information for children in care.

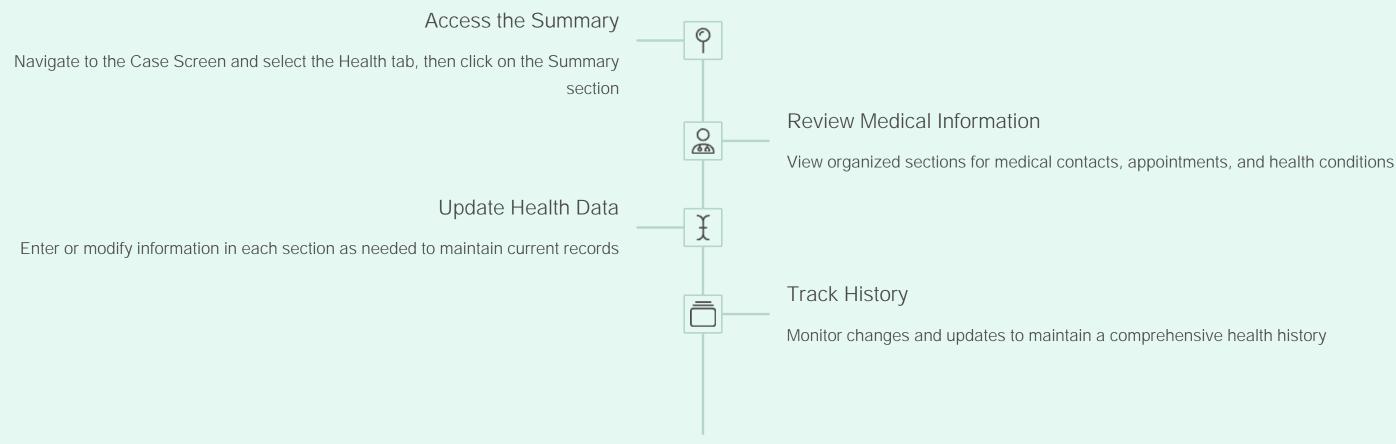
We'll explore how to access medical contacts, track appointment dates, document chronic health conditions, and maintain a detailed physical inventory. By mastering these features, you'll ensure comprehensive health monitoring and improve continuity of care for the children you serve.



by Emily Parks



Navigating the Health Tab Summary Layout



The Summary section serves as your central hub for all health-related information. Its intuitive layout organizes crucial details into clearly defined sections, allowing you to quickly access and update vital medical information for children in your care.

Managing Medical Contacts





Quick Access to Provider Information

The Medical Contacts section displays all healthcare providers associated with the child, including doctors, specialists, and therapists. Each name is hyperlinked for convenient access to their complete information.

Seamless Navigation to Details

Simply click on any blue, hyperlinked provider name to be instantly directed to their detailed information in the People tab, eliminating the need to navigate through multiple screens.

Comprehensive Provider Overview

This centralized listing helps ensure all team members are aware of the child's complete medical network, improving coordination of care and communication between providers.

Maintaining accurate medical contact information is crucial for coordinating care. This section gives you instant visibility into all healthcare providers involved in the child's treatment, allowing for better communication and more coordinated care planning.

Tracking Medical Appointments



Medical Appointment Dates									
Next Well Visit:	06/30/2018 (due)	Last Well Visit:	05/31/2018						
Well Child Comments:									
Next Dental:	- Not Specified -	Last Dental:	12/21/2018						
Dental Comments:	Bad case of scurvy								
Next Therapy:	- Not Specified -	Last Therapy:	08/30/2018						
Therapy Comments:									
Next Psychological:	01/03/2019 04:10 PM (due)	Last Psychological:	- Not Specified -						
Psychological Comments:									
Next Psychiatric:	- Not Specified -	Last Psychiatric:	- Not Specified -						
Psychiatric Comments:									
Next Vision:	- Not Specified -	Last Vision:	- Not Specified -						
Vision Comments:									
Next Hearing:	- Not Specified -	Last Hearing:	- Not Specified -						
Hearing Comments:									
Next TB:	- Not Specified -	Last TB:	- Not Specified -						
TB Comments:									
Next Lab:	- Not Specified -	Last Lab:	- Not Specified -						
Lab. Comments:	N/A								
Next OB/GYN:	- Not Specified -	Last OB/GYN:	- Not Specified -						
OB/GYN Comments:	N/A								

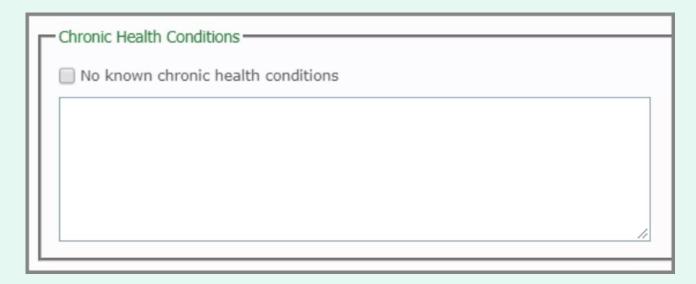


The Medical Appointment Dates section provides a chronological overview of all healthcare interactions. This helps you ensure that children receive timely medical care and that all required appointments are scheduled and completed according to care plans and regulations.

Remember that appointments are added through their associated program activity, but can be viewed and tracked comprehensively in this section. This integration ensures all health information remains connected to the broader case management system.

Documenting Chronic Health Conditions





Condition Documentation

Enter detailed information about each chronic health condition, including diagnosis date, treating physician, and current status.

This documentation ensures all caregivers and service providers have accurate information about ongoing health needs.

Treatment Tracking

Record medications, therapies, and other interventions prescribed for each condition.

Monitoring treatment plans in one location helps ensure consistency of care across different settings and caregivers.

No Conditions Option

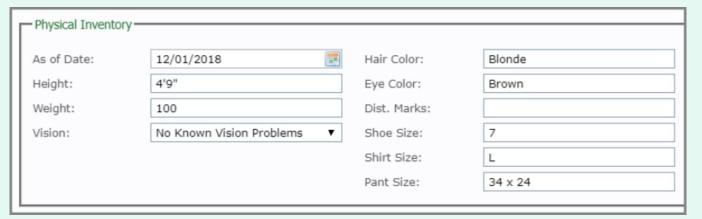
If the client has no known chronic health conditions, simply check the "No known chronic health conditions" box.

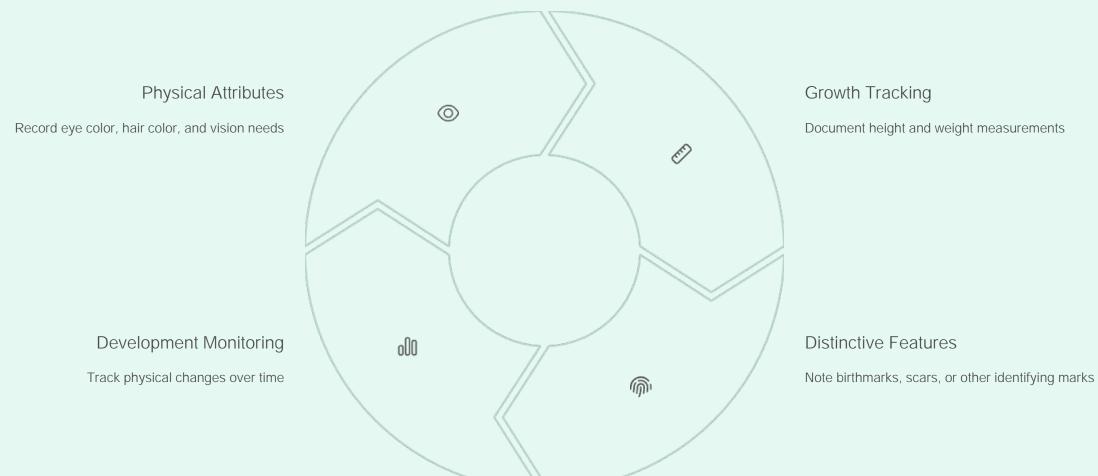
This positive confirmation helps distinguish between "none known" and "not yet documented" situations.

Accurate documentation of chronic health conditions is essential for providing appropriate care. This section allows you to maintain a comprehensive record of all ongoing health issues, ensuring that caregivers, medical providers, and other team members have the information they need to support the child's wellbeing.

Maintaining the Physical Inventory







The Physical Inventory section allows you to maintain detailed records of a child's physical characteristics and changes over time. This information serves multiple purposes, from helping identify a child in an emergency to tracking healthy growth and development patterns.

Best Practices for Health Documentation





Update Information Promptly

Enter new medical information within 24 hours of receiving it to ensure records are always current and accurate



Verify Data Accuracy

Double-check all entered information and crossreference with medical reports when available



Connect Related Information

Ensure appointments, conditions, and treatments are properly linked in the system



Maintain Confidentiality

Follow all privacy protocols when documenting sensitive health information

Implementing consistent documentation practices ensures that health information remains reliable and useful. When all team members follow these guidelines, the Health Tab becomes an invaluable tool for coordinating care and making informed decisions about a child's wellbeing.

Remember that thorough health documentation also fulfills important compliance requirements and creates a valuable historical record that stays with the child throughout their time in care.

Getting Additional Support





Email Support

Contact the support team at support@extendedreach.com for assistance with any questions not covered in this guide.



Documentation

Access comprehensive user guides and documentation through the Help Center for detailed instructions on all system features.



Training Resources

Take advantage of training videos and webinars designed to help you master the Health Tab and other system components.

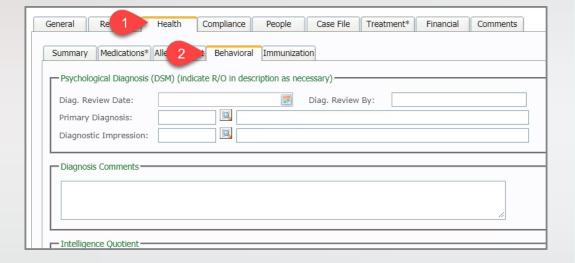


Peer Knowledge

Connect with experienced colleagues who can share best practices and workflow tips for efficient health information management.

Our dedicated support team is always ready to assist you with any questions or challenges you may encounter while using the Health Tab. We're committed to ensuring you have the resources and knowledge needed to effectively manage health information for the children in your care.

Remember that your feedback is valuable in helping us improve the system. If you have suggestions for enhancements or additional features, please share them with our support team.





Navigating the Behavioral Health Tab in ExtendedReach

Welcome to our comprehensive guide to the Behavioral portion of the Health Tab in the Case Screen. This essential feature allows you to document critical behavioral health information for foster children in your care.

We'll walk you through each component of this interface, demonstrating how to properly record psychological diagnoses, intelligence assessment data, and personal attributes that help create a holistic view of each child. Understanding how to navigate and utilize this tab effectively will strengthen your case management and improve outcomes for the children you serve.

If you encounter questions not addressed in this guide, contact our support team at support@extendedreach.com.



by Emily Parks

Understanding the Behavioral Tab Layout



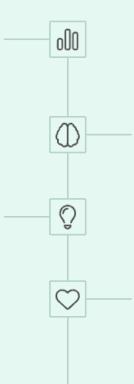
Diag. Review Date:	03/20/2013	Diag. Review By: Adam Fenstermaker, PHD
Primary Diagnosis:	077.99	Viral conjunctivitis
Additional Diagnosis:	133.0	Scabies
Additional Diagnosis:	278.00	Obesity, NOS
Additional Diagnosis:	284.00	Expressive Language Disorder
Additional Diagnosis:	296.55	Bipolar I Disorder, Most Recent Episode Depressed, In Partial Remission
Additional Diagnosis:	30	
Diagnostic Impression:	10	

Access the Tab

Navigate to the Case Screen and select the Health tab. From there, click on the Behavioral sub-tab to access all behavioral health documentation features.

Intelligence Data

Record IQ testing results, including most recent and highest scores with corresponding dates for tracking cognitive development.



Psychological Section

Document all formal diagnoses using DSM codes and criteria. This section includes diagnosis dates, review information, and supporting comments.

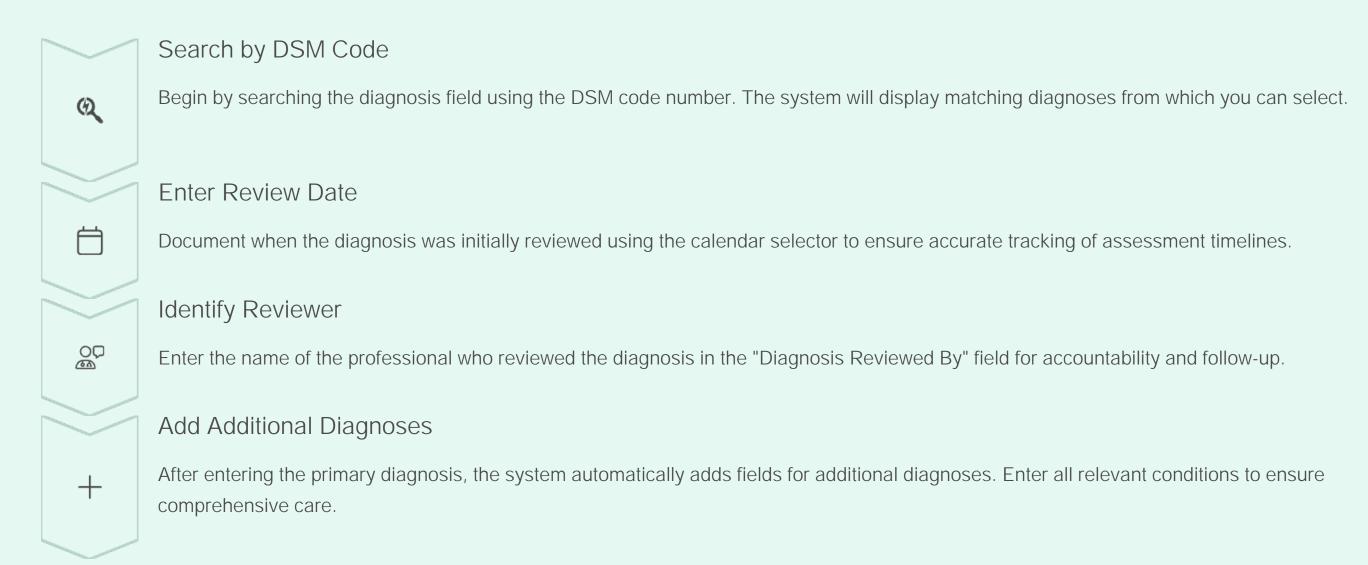
Personal Attributes

Document hobbies, interests, and strengths to develop a well-rounded understanding of the child beyond clinical assessments.

The Behavioral tab serves as a centralized location for all behavioral health information, allowing case workers to track changes over time and ensure appropriate services are being provided to meet each child's unique needs.

Recording Psychological Diagnoses





Accurate diagnosis documentation is critical for developing appropriate treatment plans and securing necessary services. Always verify that diagnostic information is current and has been properly reviewed by qualified professionals.

Adding Diagnostic Comments





Context and History

Include information about when symptoms first appeared, how they've evolved over time, and any triggering events that may have contributed to the diagnosis.

Functional Impact

Note how the diagnosis affects daily functioning, including school performance, social relationships, and ability to participate in ageappropriate activities.

Treatment Response

Document how the child has responded to previous or current treatments, including therapy approaches, interventions, and medications that have been tried.

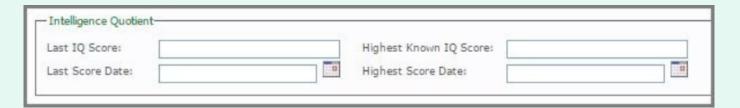
Diagnostic Uncertainty

Record any disagreement among providers about the diagnosis or notes about symptoms that don't fully align with diagnostic criteria that may need further assessment.

The comments section provides critical context beyond the formal diagnosis code. Detailed notes help the care team understand the unique presentation of symptoms in this child and can highlight areas requiring specialized intervention or additional support services.

Tracking Intelligence Quotient Data





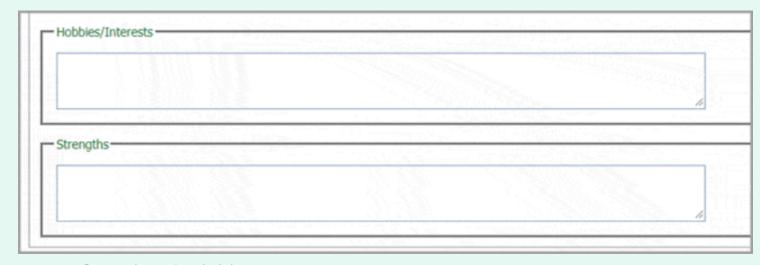
Field Name	Description	Best Practices
Last IQ Score	Most recent IQ assessment result	Include full-scale score and date of assessment
Last Score Date	When the most recent assessment occurred	Update after each new evaluation
Highest Known IQ Score	Highest recorded score from any assessment	May differ from most recent; important for tracking potential
Highest Score Date	When the highest score was achieved	Helps identify timing of optimal performance

IQ testing provides valuable information about a child's cognitive abilities and learning needs. These assessments should be interpreted as one piece of a larger picture, rather than definitive measures of intelligence or potential.

When significant discrepancies exist between test scores, consider factors such as testing conditions, the child's emotional state during assessment, or developmental changes that may explain the variation.

Documenting Hobbies and Interests







Creative Activities

Document artistic interests such as drawing, painting, music, dance, or creative writing that the child enjoys or shows aptitude for.



Physical Activities

Record participation in sports, outdoor activities, or exercise preferences that promote physical health and social development.



Intellectual Pursuits

Note interests in reading, specific academic subjects, puzzles, strategy games, or other activities that engage cognitive skills.



Social Interests

Capture preferred social activities, clubs, community involvement, or specific relationship patterns that reveal social preferences.

Understanding a child's interests provides insight into potential motivational tools and therapeutic approaches. This information helps create more personalized treatment plans and identifies activities that can build self-esteem and create opportunities for positive reinforcement.

Regularly update this section as interests evolve, and use this information when coordinating with schools, therapists, and foster families to ensure consistency in supporting the child's development.

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Identifying and Recording Strengths



Identifying a child's strengths is fundamental to strengths-based case management. These positive attributes can be leveraged in treatment planning and placement decisions to build resilience and promote positive development despite adverse experiences.

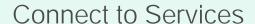
Documenting strengths helps counter the deficit-focused nature of much clinical documentation and ensures that the child is seen as a whole person with capabilities and potential, not just as a collection of problems to be solved.

Best Practices for Documentation

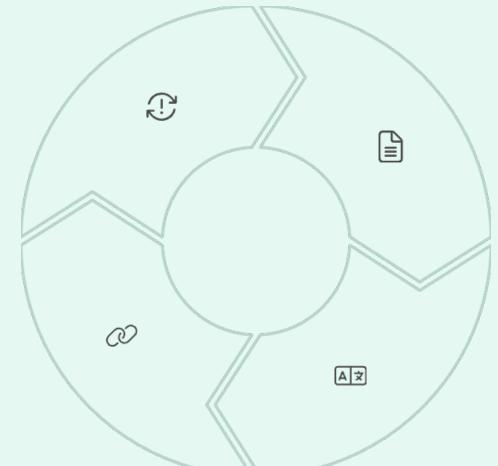


Regular Updates

Update behavioral information at least quarterly or whenever significant changes occur to maintain current records.



Ensure documented needs directly inform service planning and are reflected in the child's care plan.



Comprehensive Documentation

Include information from multiple sources such as therapists, teachers, foster parents, and the child themselves.

Objective Language

Use clear, factual descriptions avoiding subjective judgments or stigmatizing terminology.

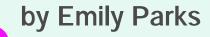
Thorough documentation in the Behavioral tab provides valuable insights for the entire care team. This information helps ensure continuity of care across placements, informs educational planning, and supports advocacy efforts for appropriate services.

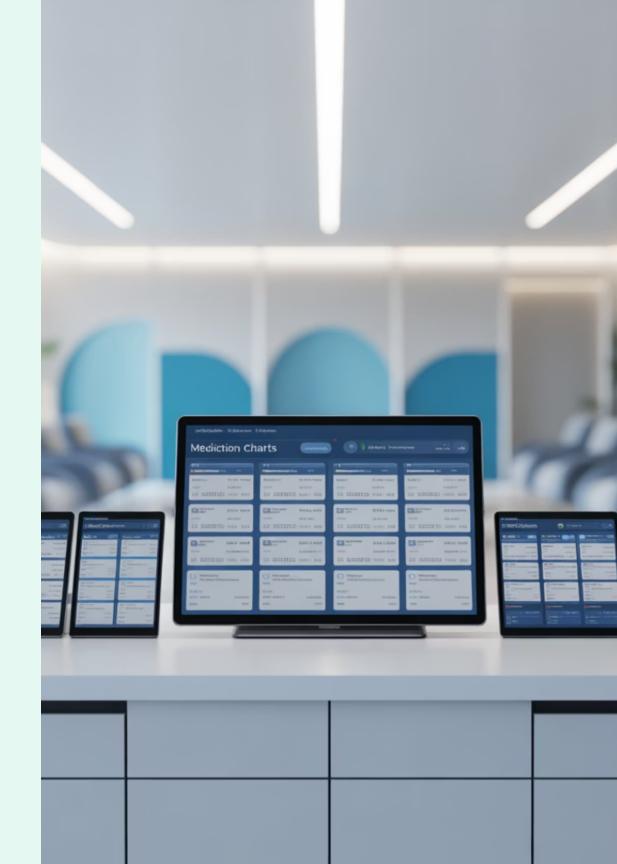
Remember that this documentation becomes part of the child's permanent record. Focus on capturing information that will be helpful for understanding the child's needs and strengths both now and in the future as they transition through the foster care system.

Comprehensive Guide to Medication Administration Record (MAR) Subforms

Welcome to our comprehensive guide on Medication Administration Record (MAR) subforms. This presentation will provide you with detailed information about the various MAR subforms available in extendedReach, their specific fields, and how to implement them correctly in your documentation workflow.

As internal staff responsible for medication administration and documentation, understanding these subforms is crucial for maintaining accurate records, ensuring proper medication delivery, and meeting compliance requirements. Let's explore the tools available to streamline your medication documentation process.







System Access Requirements & Implementation Process



Required Permissions

Access to MAR subforms requires either Full Administrator privileges or Restricted Administrator - Forms Administration permissions in extendedReach.



Locating Subforms

Find specific subforms by scrolling through the comprehensive list or using browser search functionality (CTRL+F) to quickly locate the required form type.



Implementation Steps

After identifying the appropriate subform, copy the exact name and add it to a program report type specifically configured for MAR documentation.

Internal MAR Subform: S_Case_MAR Overview



Core Functionality

This standard internal MAR subform pulls medications 1-15 from the medications tab in the Health section of case files. It provides basic medication tracking functionality with simplified status options.

Key Features

- Monthly organization with days 1-31 tracking grid
- Core medication details including name, dosage, and prescriber
- Four medication status options for clear documentation

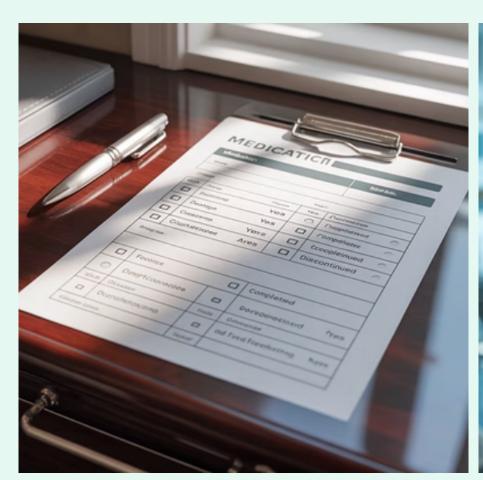


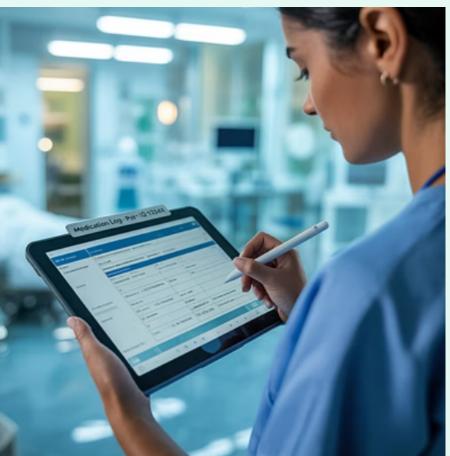
Status Options

Medication Given

Advanced Internal MAR Options: S_Case_MAR_DDM & S_Case_MAR_CF









S_Case_MAR_DDM Series

Enhanced tracking for medications 1-13 (standard) and 14-26 (extended version). Includes detailed status options for precise documentation of medication events, plus additional fields for prescription numbers and refill tracking.

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Incident Reporting Integration

Both advanced form series include status codes that automatically trigger incident report requirements, creating accountability for missed doses and documentation of medication refusals.





S_Case_MAR_CF Series

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Comprehensive tracking with expanded status options for residential care scenarios. Includes specialized codes for situations like home visits, school administration, and hospitalizations. Available in standard (1-13) and extended (14-26) versions.

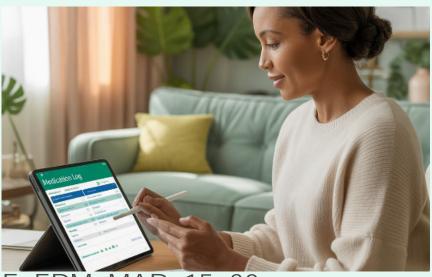
Foster Family Website MAR Subforms: Basic Options





F_FRM_MAR

Standard foster family form tracking medications 1-15 with expanded administration options specifying who administered the medication (EBP, EEP, or Other). Includes client identification fields and full month tracking grid.



F_FRM_MAR_15_30

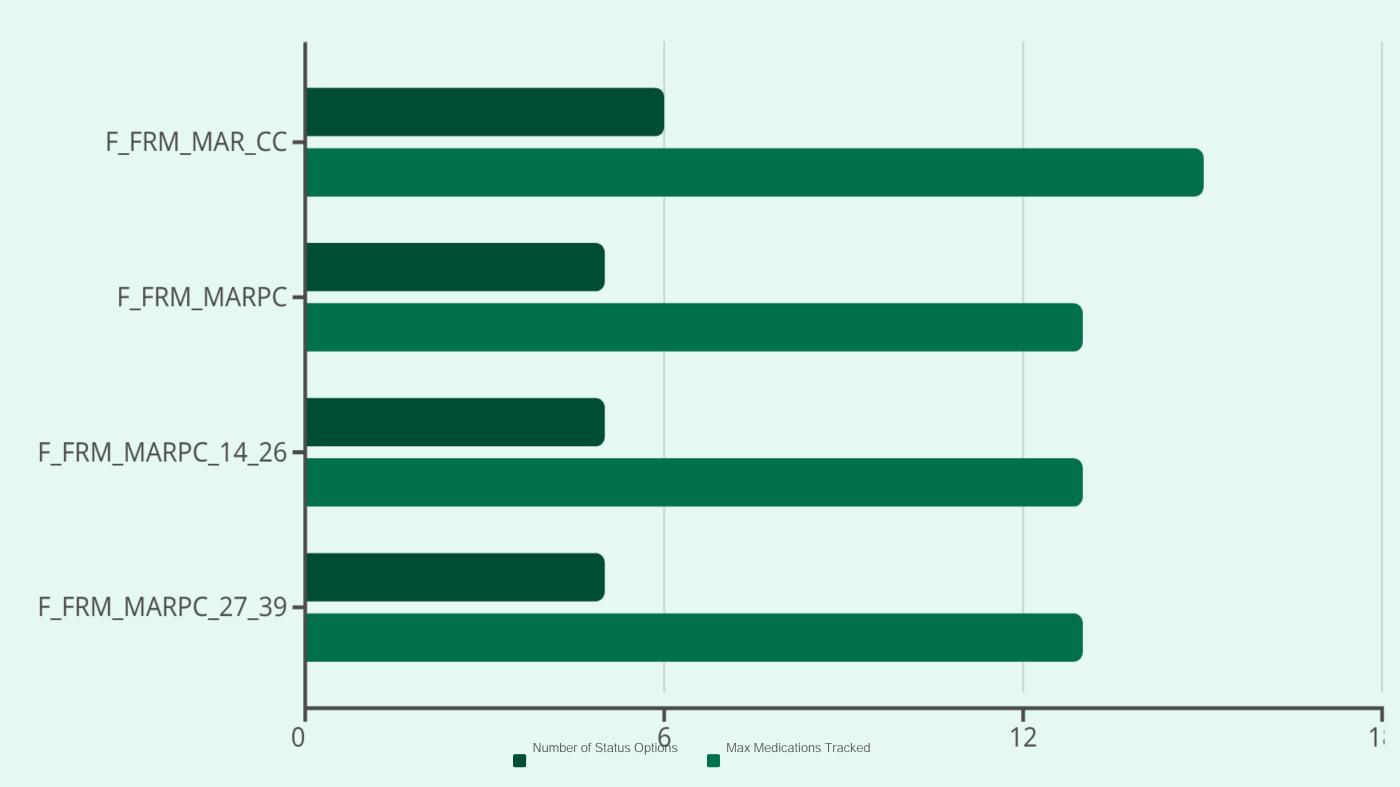
Extended medication tracking for medications 16-30, enabling documentation of complex medication regimens. Includes simplified administration options while maintaining comprehensive tracking capability.



F_FRM_MARS Series

Enhanced accountability through electronic signature requirements. Available in three variations with different signature configurations: single signature, parent/child signatures, or dual parent signatures.





Selecting the Right MAR Subform for Your Documentation Needs





When selecting the appropriate MAR subform, begin by considering your specific practice environment and whether the form will be used internally or by foster families. Next, evaluate the complexity of medication regimens you typically manage, as this will determine if you need extended medication capacity.

Accountability requirements should guide your decision regarding signature fields and status tracking options. Finally, consider how your documentation needs to integrate with incident reporting systems and what level of detail is required for compliance and quality assurance purposes.

Implementation Best Practices & Key Takeaways





Standardize Form Selection

Establish clear guidelines for which MAR subforms should be used in specific situations to ensure consistency across your organization.



Provide Comprehensive Training

Ensure all staff and foster families understand how to properly complete their designated MAR subforms, including proper use of status codes and documentation requirements.



Implement Regular Audits

Establish a system for reviewing completed MARs to identify documentation gaps or training needs and ensure medication administration compliance.



Develop Support Resources

Create quick reference guides for each MAR subform type to help users select the appropriate codes and complete documentation accurately.

Remember that MAR subforms cannot be customized with additional fields or modifications. This standardization ensures data integrity and system compatibility. If you encounter specific documentation needs not addressed by the available subforms, consider supplementing with additional documentation rather than attempting to modify the MAR structure.

Foster Care Compliance Tab: Complete User Guide

The Compliance Tab within foster care case management provides a comprehensive overview of activities and reports that have been collected, are missing, or are due. This essential tool helps caseworkers maintain regulatory compliance and track critical documentation efficiently.

This guide will walk you through every aspect of the Compliance Tab, from understanding color-coded status indicators to filtering and exporting compliance data across multiple cases.

by Emily Parks







Understanding the Compliance Tab Purpose

Provides a quick glance at all case activities and reports in one centralized location

Current Status Focus

Shows only the most recent document for each item, streamlining case review

Historical Access

For previous versions of documents like Service Plans, users must refer to the Case File Tab



Color-Coded Status System



Green Status

Item has been completed OR item is due or expires more than 10 days from now. This indicates good standing and no immediate action required.

Red Status

Item is missing, past due, or has expired. This requires immediate attention and action from the caseworker.

Yellow Status

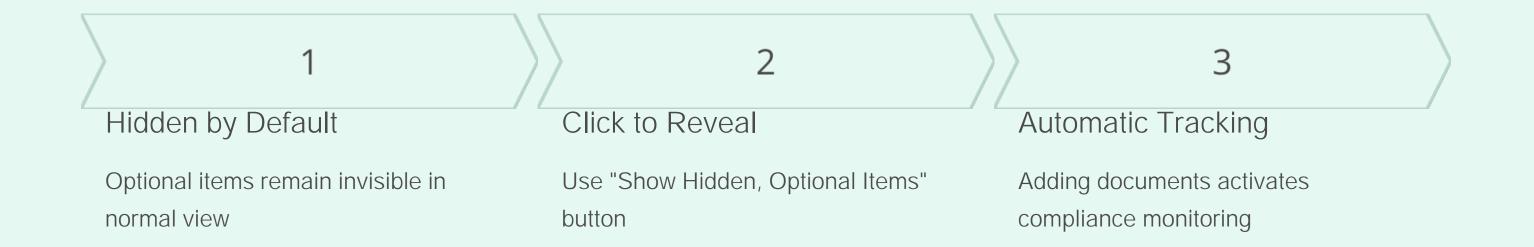
Item is currently drafted/in progress or expires within the next 10 days. This serves as an early warning system.

White Status

Optional items that appear only when "Show Hidden, Optional Items" is clicked. These become tracked once documents are added.

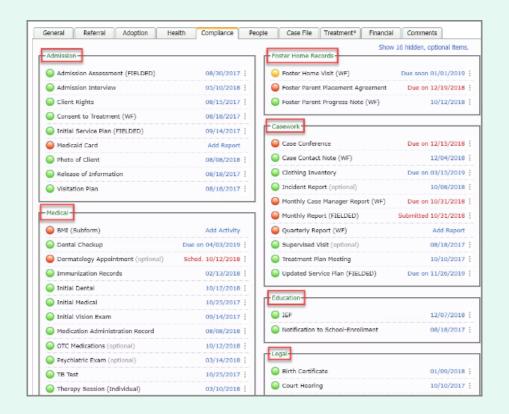


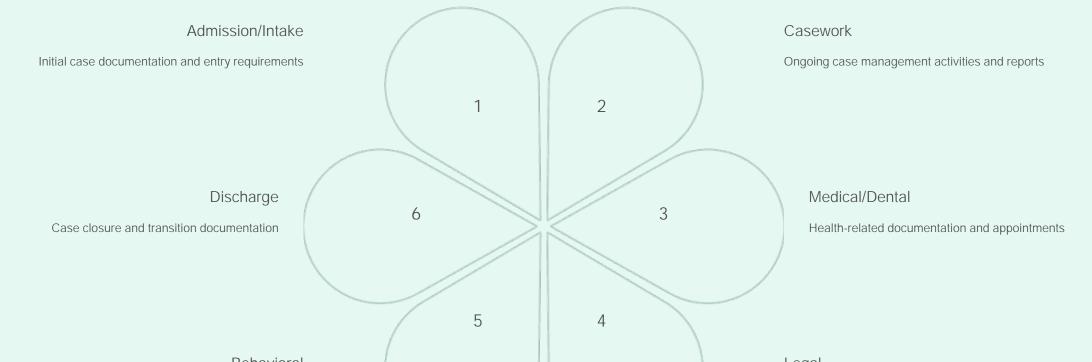
Optional Items Management



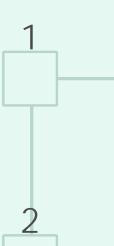
Compliance Categories Structure





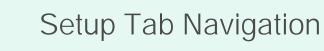


Category Customization Options



Agency Administrator Access

Only administrators can modify compliance categories through Program Settings



Categories are managed under the Setup tab in Program Settings

Alphabetical Organization

All items within each category are automatically listed alphabetically



Accessing Activities and Reports

Blue Hyperlink Access

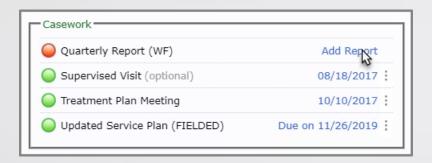
Click on the blue hyperlink next to any Activity or Report to access the current version of that document directly.

Direct Navigation

This provides immediate access to the most recent version of any compliance item for quick review or editing.

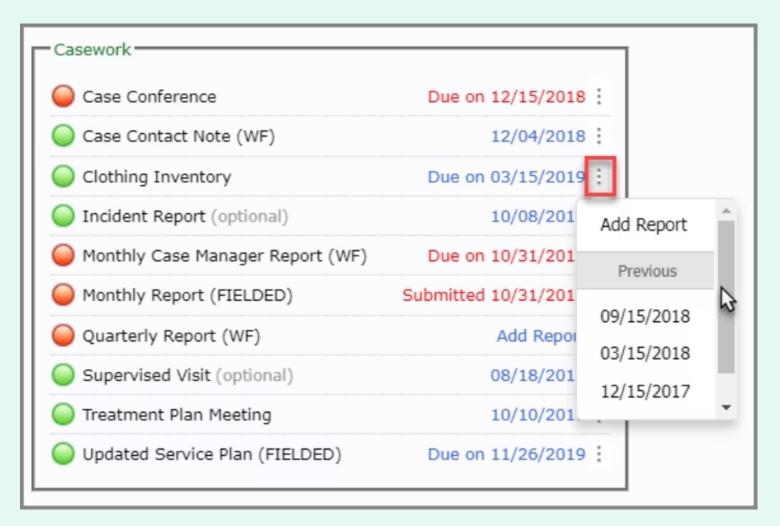
Streamlined Workflow

The hyperlink system eliminates the need to navigate through multiple screens to find specific documents.



Managing Previous Versions





Three Dots Menu

Click on the three dots to the right of each entry to access a dropdown menu with additional options for that compliance item.

This menu provides access to historical versions and the ability to add new reports when needed.

Add New Reports

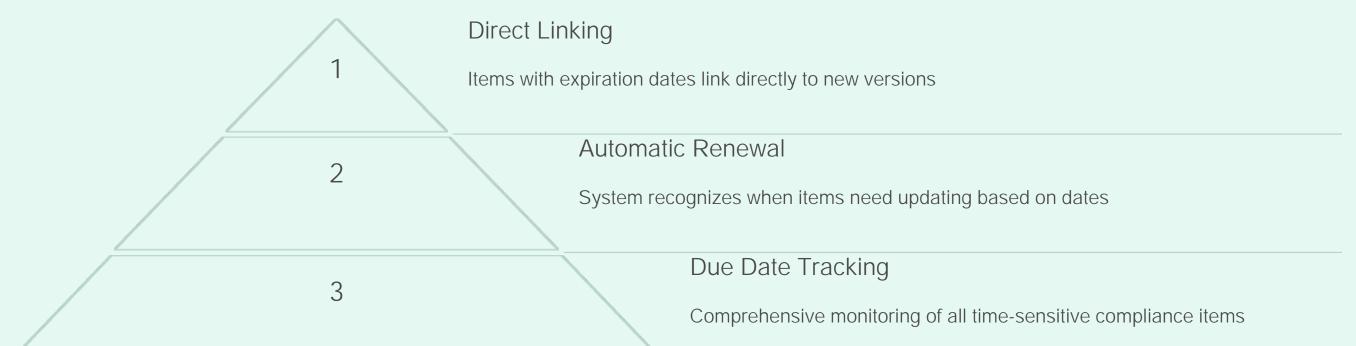
For items that don't expire or have repeating due dates, select "Add Report" from the three dots menu to create new versions.

This feature is essential for ongoing documentation requirements that need regular updates.

Expiration Date Management







Accessing Compliance Tracking

1

Navigate to Workspace

Start from your main Workspace and locate the "Cases" section on the left side of your screen

Hover Over Case Tasks

Move your cursor over "Case Tasks" to reveal the dropdown menu with additional options

Select Compliance Tracking

3

Click on "Compliance Tracking" to access a comprehensive snapshot of compliance status across all your cases





Filtering by Program



Program Filter

Click on the Program Box at the top of the screen to filter compliance data by specific programs



Caseworker Filter

Use the Caseworker Box to filter and view compliance status for specific workers



Scroll Selection

Scroll through available options and click to select your desired filter criteria



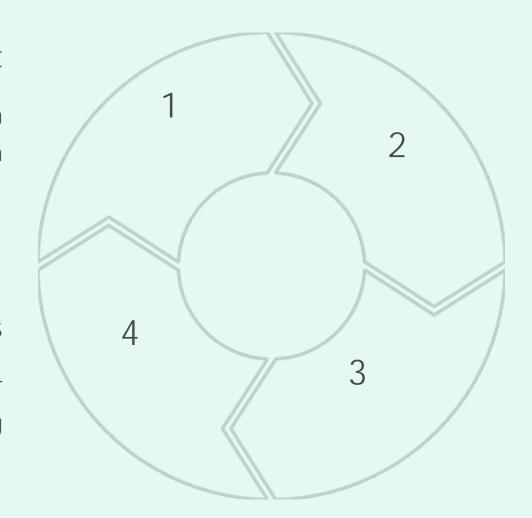
Exporting Compliance Data

Excel Export

Click "Excel" at the top of the screen to export compliance information

External Analysis

Exported data can be used for further analysis and reporting



Microsoft Word Excel

Data exports into a Microsoft Word Excel spreadsheet format

Comprehensive Data

Export includes all filtered compliance tracking information



Support and Additional Resources

Technical Support

For questions not addressed in this guide, contact support at support@extendedreach.com. The support team is available to help with technical issues and provide additional guidance on using the Compliance Tab effectively.

Sales Inquiries

For advanced reporting features and platform enhancements, reach out to sales@extendedreach.com. They can discuss adding Zoho Analytics Reports and other premium features to expand your compliance tracking capabilities.



Key Takeaways and Best Practices



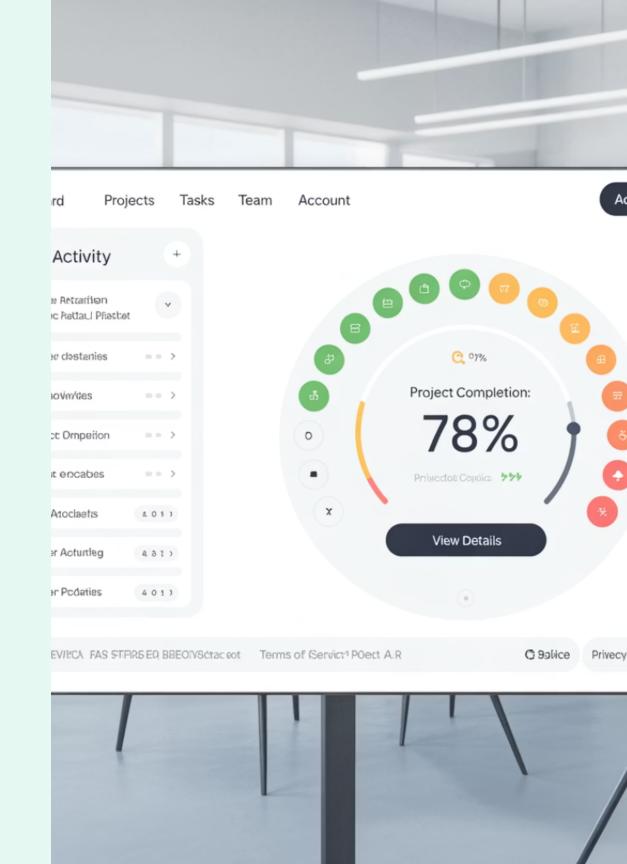
	Color-Coded Efficiency
	Use the color-coding system to quickly identify items requiring immediate attention (red), upcoming deadlines (yellow), and completed items (green)
	Regular Monitoring
	Check the Compliance Tab regularly to stay ahead of due dates and maintain regulatory compliance across all cases
	Utilize Filtering
	Take advantage of program and caseworker filtering to focus on specific areas and export relevant data for analysis and reporting
	Leverage Support
	Don't hesitate to contact support for technical assistance or sales for advanced reporting capabilities to maximize your compliance tracking efficiency

Daily Activity and Report Summary: Simplifying Task Management

Welcome to our comprehensive guide on configuring and utilizing the Daily Activity and Report Summary feature. This powerful tracking tool helps system administrators visualize completed, missing, or duplicated activities and reports for both cases and homes in the ExtendedReach platform.

Throughout this presentation, we'll walk through the complete setup process, from enabling system preferences to interpreting the color-coded tracking interface. By implementing this feature, your team can better monitor daily tasks, improve accountability, and ensure consistent documentation across your organization.





System Configuration: Enabling Activity Tracking

Access Organization Settings

Navigate to Organization Settings > Organization Preferences > Settings to begin configuration

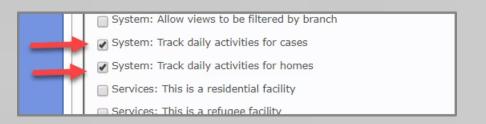
Enable System Tracking

Activate both "System: Track daily activities for cases" and "System: Track daily activities for homes" options

Configure User Permissions

For each staff member, enable "Show Case Daily Activity Summary" or "Show Home Daily Activity Summary" on their User ID

The system configuration requires administrator access to establish organization-wide settings. Once enabled at the system level, administrators must then set individual user permissions to determine which staff members can access the daily summary features. Staff with House Parent workplace roles will automatically see activities for all assigned cases and homes.



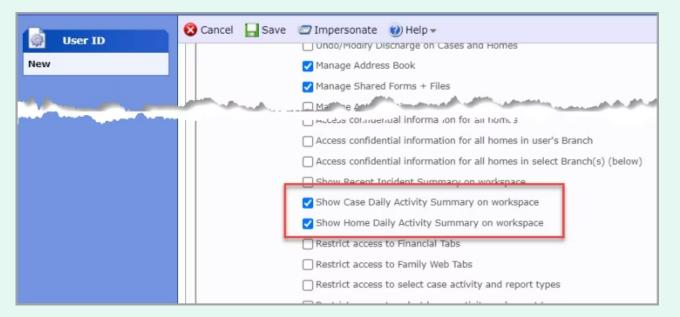
User Permission Management



Administrator Tasks

As a system administrator, you'll need to configure user-specific permissions after enabling system tracking. Navigate to Organization Settings > User IDs to access individual staff settings.

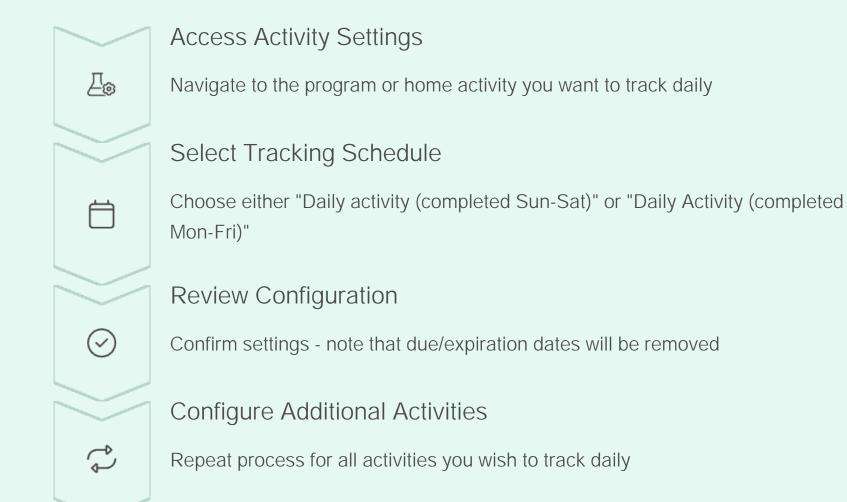
Look for the permissions section where you can enable either "Show Case Daily Activity Summary on workspace" or "Show Home Daily Activity Summary on workspace" depending on staff responsibilities.



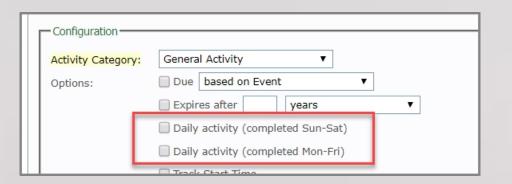
The permission settings displayed in the User ID configuration panel determine which staff members can view daily activity summaries. This granular control ensures that staff only see relevant information based on their roles and responsibilities.

Remember that staff members will only see the daily activities for cases and homes specifically assigned to them, and only when they've selected the House Parent workplace role. This helps maintain appropriate access controls while providing necessary visibility to those who need it.

Configuring Daily Activities



When configuring activities for daily tracking, it's important to note that the system will automatically remove due/expiration dates. This is by design, as repeating daily due dates would quickly overwhelm task lists and become unmanageable. Instead, the daily activity summary provides a more streamlined approach to monitoring recurring tasks.



Setting Up Report Tracking



Access Report Settings

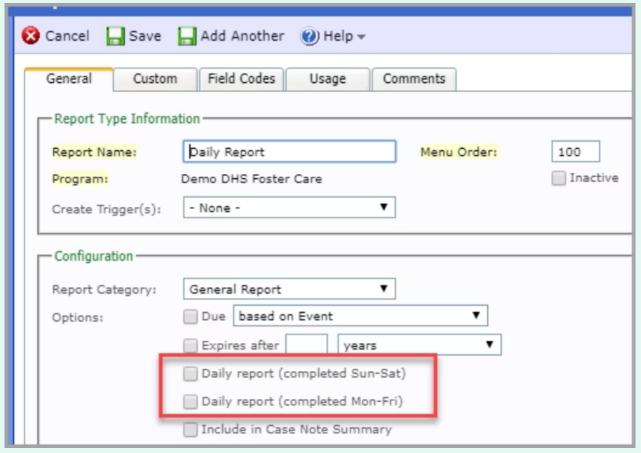
Navigate to program report or home report settings for the reports you want to track on a daily basis. These settings are accessible through the administrative interface.

Select Tracking Frequency

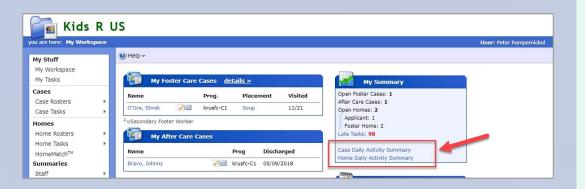
Choose between "Daily activity (completed Sun-Sat)" for full week tracking or "Daily Activity (completed Mon-Fri)" for weekday-only tracking, depending on your organization's operational schedule.

Apply Configuration

Save your settings to begin tracking the selected reports. The configuration process is nearly identical to setting up daily activities, maintaining consistency in the administrative experience.

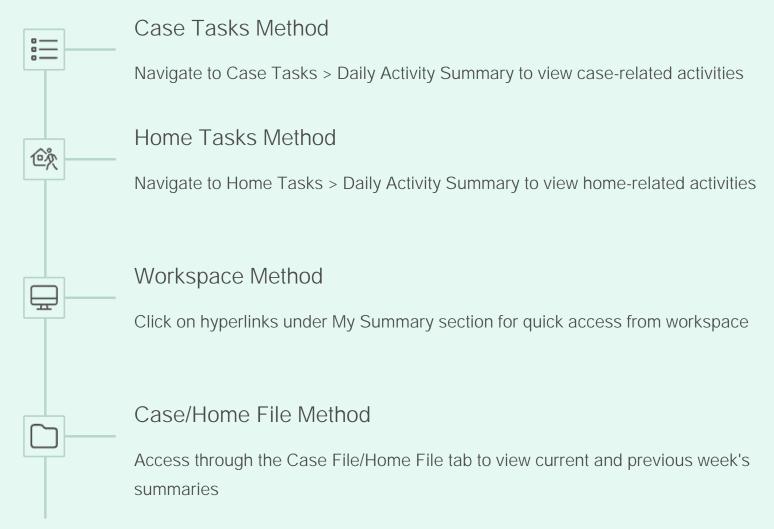


Report tracking follows the same configuration principles as activity tracking, but applies specifically to documentation requirements. By implementing both activity and report tracking, administrators can create a comprehensive daily monitoring system that covers all aspects of required case and home management tasks.



Accessing the Daily Summary





The system provides multiple navigation paths to access daily summaries, accommodating different workflows. Staff can choose the most convenient access method based on their current location in the system and the specific information they need to review. The workspace view offers particularly quick access for routine daily checks.



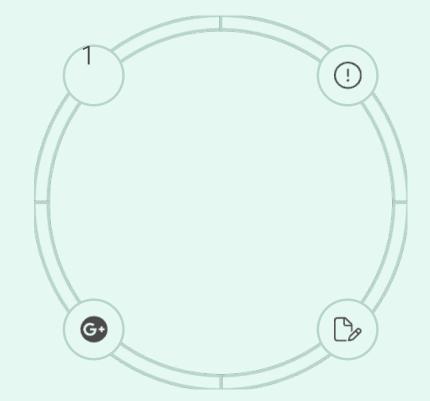
Understanding the Color-Coded Interface



Activity or report has been successfully completed

White

Activity or report has not been created yet



Yellow

Duplicate activity or report has been completed

Red

Activity or report exists as a draft but hasn't been completed

The color-coded visual system provides an intuitive way to quickly assess task status across cases and homes. Each dot represents an activity or report for a specific day, with colors indicating completion status. This at-a-glance visualization helps administrators and staff identify gaps or issues requiring attention without reviewing individual records.

Maximizing Daily Summary Functionality





Interactive Navigation

Click directly on colored dots to access the corresponding activity or report for immediate review or editing



<u>~</u>3

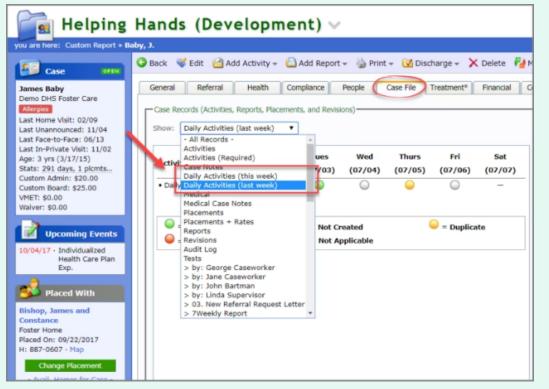
Quick Creation

Click on white dots to create new activities or reports for days where none exist



Historical Review

Access previous week's summaries through the Case/Home File tab for retrospective analysis



Compliance Monitoring

Use the visual patterns to identify recurring documentation gaps or issues requiring intervention

Beyond basic status tracking, the Daily Activity Summary serves as a powerful navigation and workflow tool. The interactive interface allows staff to quickly access, create, and manage activities and reports directly from the summary view. For administrators, the summary provides valuable compliance insights, helping identify patterns that may indicate training needs or process improvements.

If you have questions not addressed in this presentation, please contact support at support@extendedreach.com for additional assistance with configuring or using the Daily Activity and Report Summary feature.



Foster Care - Case Screen: People Tab

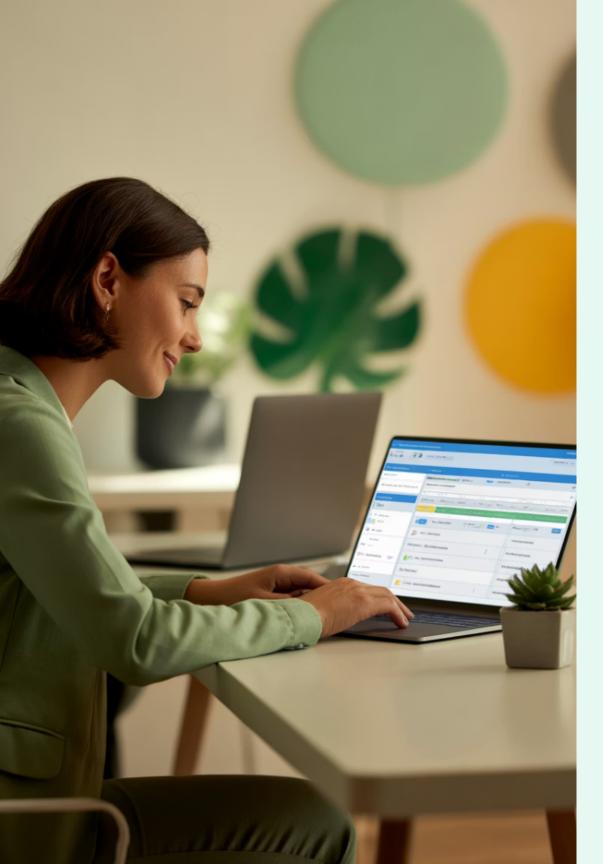
This presentation will guide you through the People Tab in a Case Screen. The People Tab is a great place to store information, as this data will be accessible to all users within your agency.

We'll cover the following topics:

- Introduction
- People Tab Layout
- Add Relationship
- Copy From Other Case
- Copy from Address Book
- Sibling Group

by Emily Parks







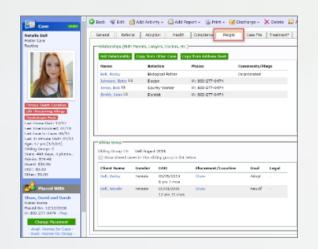
Introduction

Purpose

This article is meant to assist you with the People Tab in a Case Screen. The People Tab is a great place to store information, as this data will be accessible to all users within your agency.

Support

If you have a question not addressed here, you can contact support at support@extendedreach.com.



People Tab Layout

Overview

The People tab is where you can enter in information about the People involved int he client's life. Biological parents, aunts, uncles, grandparents, medical professionals, etc.

Adding Methods

There are 3 methods that can be used when adding people to the People tab: manually adding the relationship, copying relationships from other cases, or copying from the address book.

Data Access

This data will be accessible to all users within your agency, making it a central repository for important relationship information.

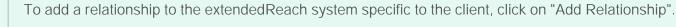
Add Relationship







Click "Add Relationship"





Select Relationship Type

Use the "Type" drop-down to select whether the relationship type is for a person or an organization. Depending on what you select in the "Type" drop-down, your options for the "Relationship" field will vary.



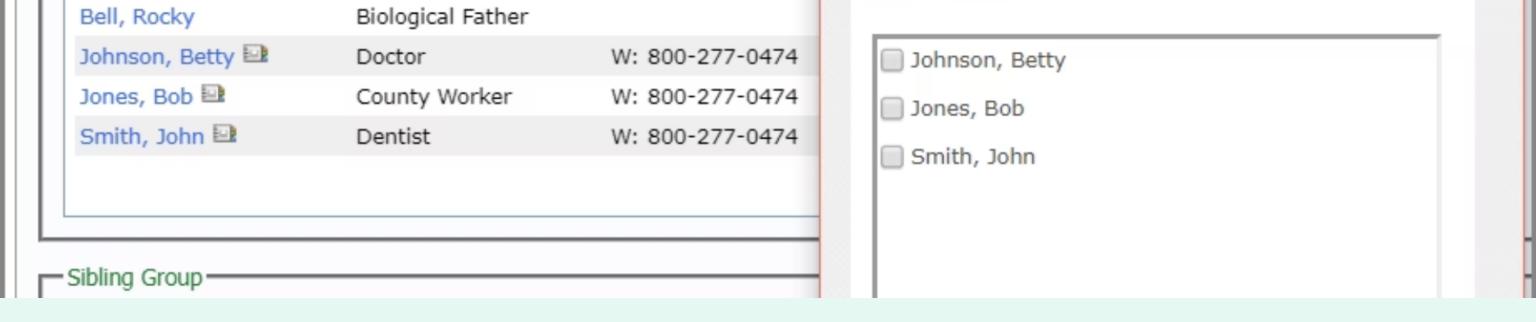
Specify Custom Relationships

If the relationship you are looking for is unavailable in the Relationship field, select "Other" and indicate the relationship type in the "Specify" field.



Set Additional Options

Additionally, indicate whether or not the individual is an approved visitor and if they are approved for phone calls. You can flag the relationship, which will show in the main People tab view.



Copy from Other Case



Click "Copy from Other Case"

Another way to add a relationship to the People Tab, is to click on "Copy from Other Case".



Select Source Case

A pop-up will then appear that will allow you to pick a case to pull relationships from.

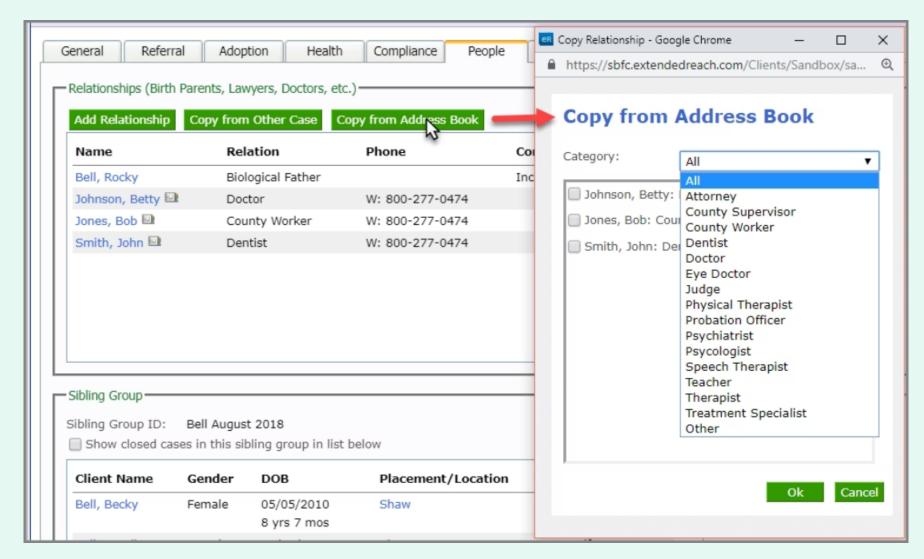


Choose Relationships

You can pick select relationships or click on Check All and then Ok to transfer the relationships over.

Copy from Address Book





Address Book Integration

The last way to add a relationship to the People Tab, is to click on "Copy from Address Book".

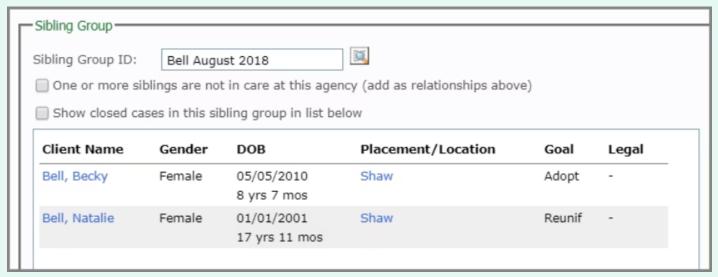
This will pull all the information over for the selected individuals from the agency's extendedReach <u>address</u> <u>book</u>.

Benefits

- Saves time by reusing existing contact information
- Ensures consistency across the system
- Reduces data entry errors
- Maintains up-to-date contact information

Sibling Group



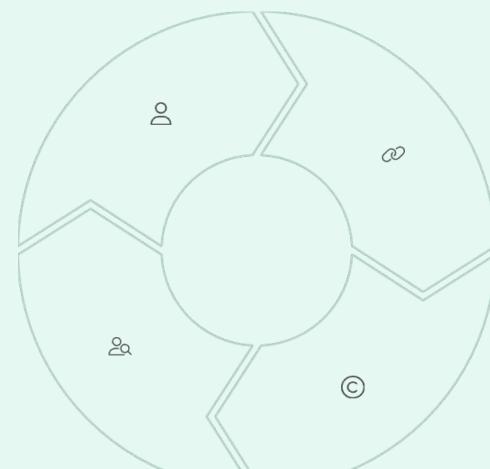


Create Sibling Group ID

Link together siblings by creating a Sibling Group ID.

Find Existing Groups

Use the magnifying glass to search for a Sibling Group ID that has already been created. Click on the ID and then Save on the case profile and the link will be created.



View Linked Siblings

Once the ID has been created, linked siblings will show in the Sibling Group section on the People tab.

Share Information

Reports and activities can be configured to copy over to siblings to prevent repetitive entry.

Dashboard

Cases

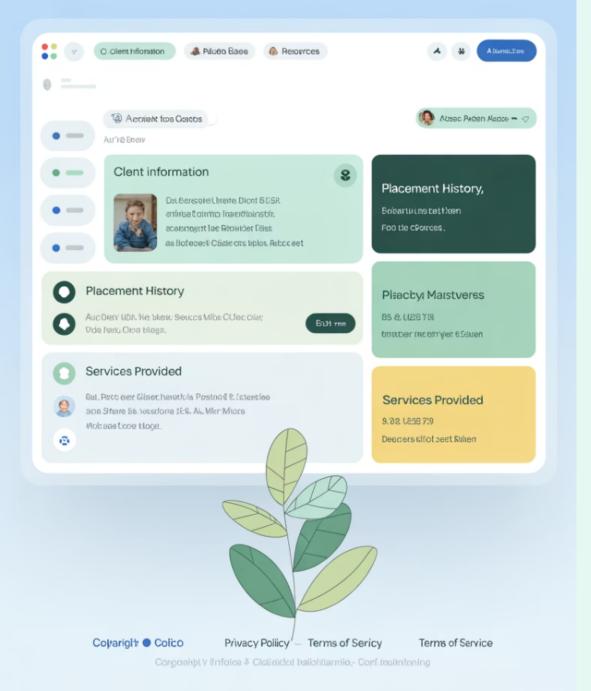
Reports

Resources





Footer Care Management Case Poftwicy



WHISPERING PINES

Foster Care - Case Screen: Case File Tab

This guide will assist you with the Case File Tab in a Case Screen. The content covers Introduction, Case File, Show options, and how to Download Files.



by Emily Parks



Introduction

Purpose

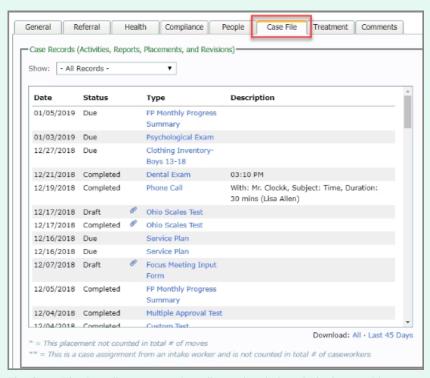
This article is meant to assist you with the Case File Tab in a Case Screen.

Support

If you have a question not addressed here, you can contact support at support@extendedreach.com.

Case File Tab Layout



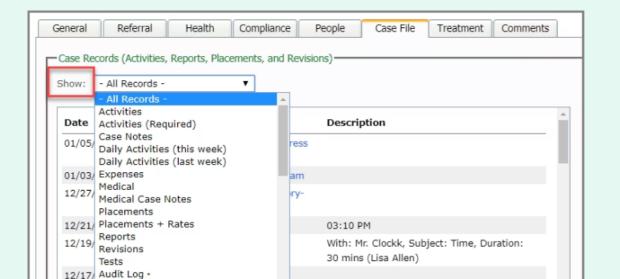


The Case File view allows you to view all completed, due, drafted, or expiring reports and activities. Additionally, you can view any case revision history, placement history, and more!

Image: "Case Screen: Case File Tab Layout"

Use the "Show" drop-down to select what you want to view in the Case File.

Image: "Show Case Records Options"



Download Files

Access Download Option

You can download all of the files available in the Case File directly to your computer in a zip folder.

Choose Download Period

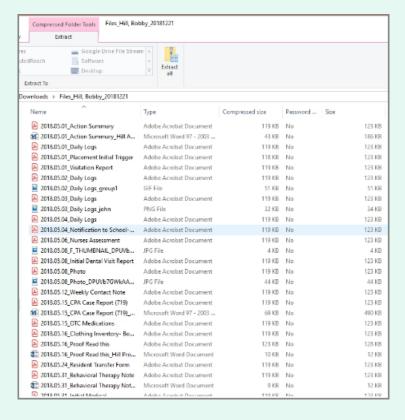
You can choose to either download all files or all files in the last 45 days.

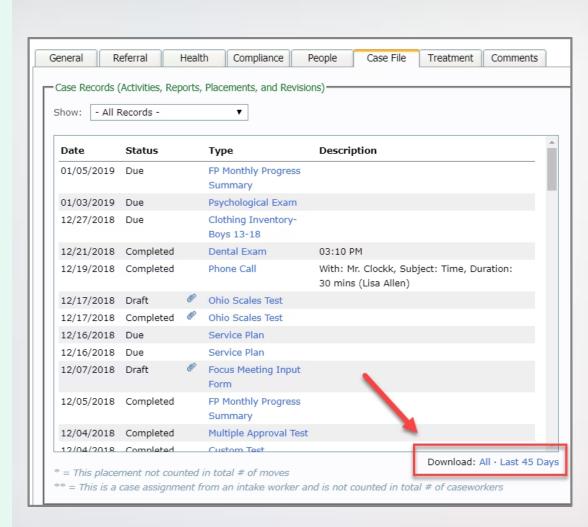
Access Downloaded Files

Once downloaded, you will be able to access a folder with all the home documentation, in chronological order.

Image: "Download Files Option"

Image: "Downloads"





Managing Treatment Goals in Foster Care Case Management



The Treatment tab in extendedReach provides a comprehensive way to track a child's educational, social, medical, and other developmental goals within the foster care system. This powerful feature allows case managers to document objectives, monitor progress, establish timeframes, and record specific interventions needed for goal achievement.

Setting Up the Treatment Tab

Before using this feature, system administrators must enable it through Program Settings. Navigate to Program Settings > Programs > Select program > Setup and check "Treatment: Track treatment goals" to activate this functionality for your agency.

Additional customization options are available under Organization Settings > Organization Preferences > Settings > Show Advanced Settings, where you can add goal categories, customize statuses, and modify field labels to match your agency's terminology.



The Treatment tab provides a clear overview of all goals with options to filter by active status. Adding new goals can be done manually for individual cases or by copying existing goals from other cases to maintain consistency in documentation.



Goal Documentation

Record specific objectives with detailed descriptions of desired outcomes and timeframes for achievement



Progress Tracking

Monitor and record advancement toward goals with status indicators (in process, achieved, not achieved)



Intervention Planning

Document actions and strategies that will be implemented to help the child reach their goals



Reporting

Generate comprehensive reports showing goal achievement percentages and outcomes across categories

The Treatment Goals report under Casework > Treatment Goals provides valuable insights into goal progress with percentage breakdowns by status. Using the Group By feature allows for organization by caseworker or goal category, facilitating effective supervision and program evaluation.

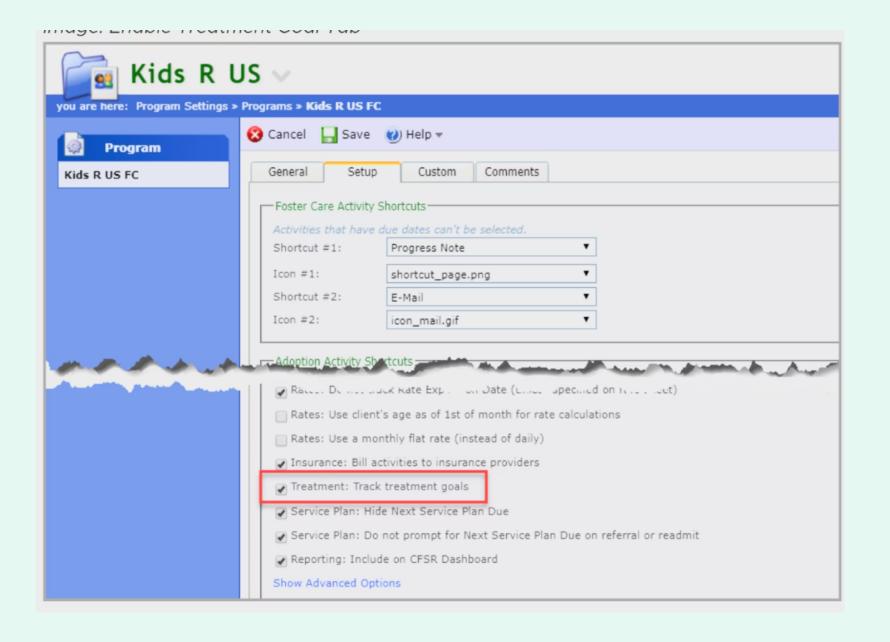


by Emily Parks

Turning on Treatment Goals

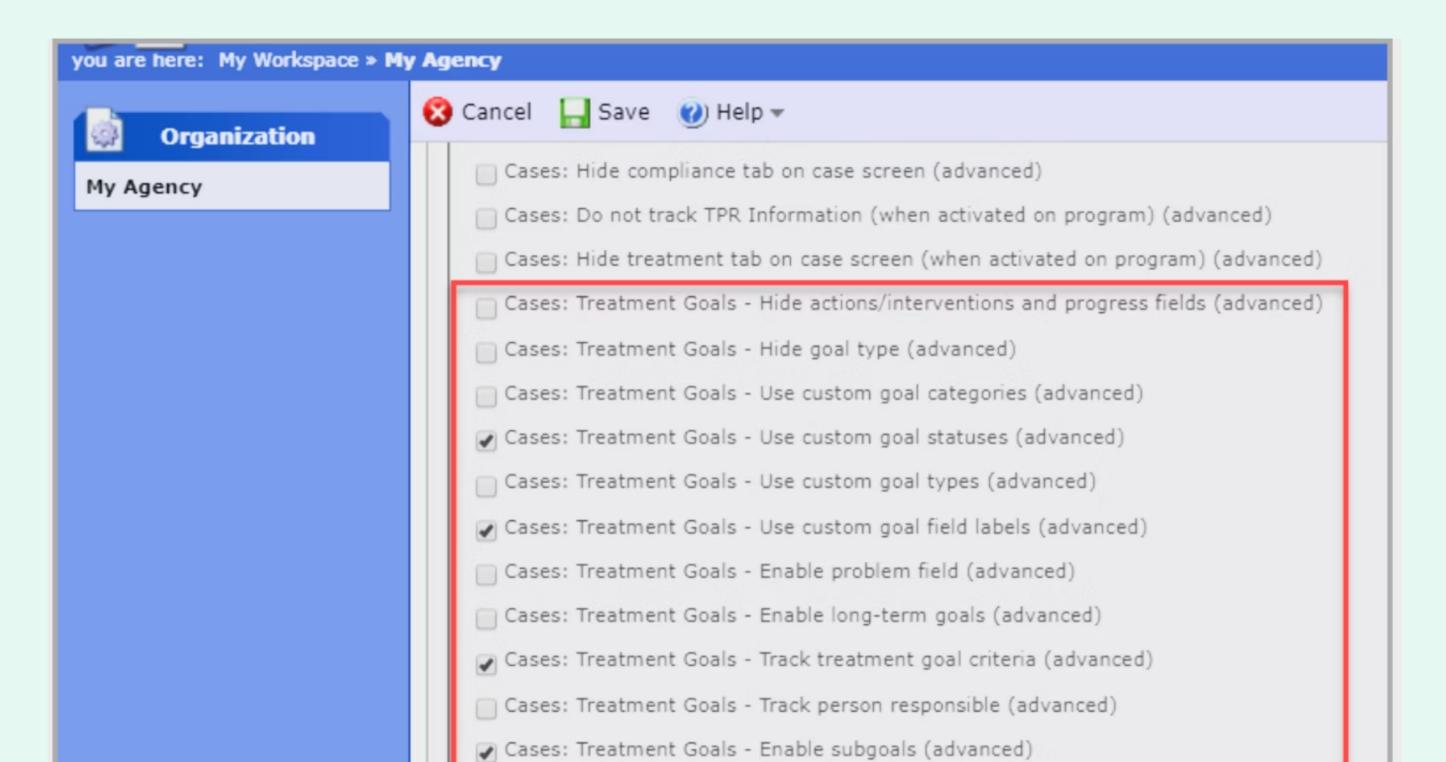


Can also rename this Tab



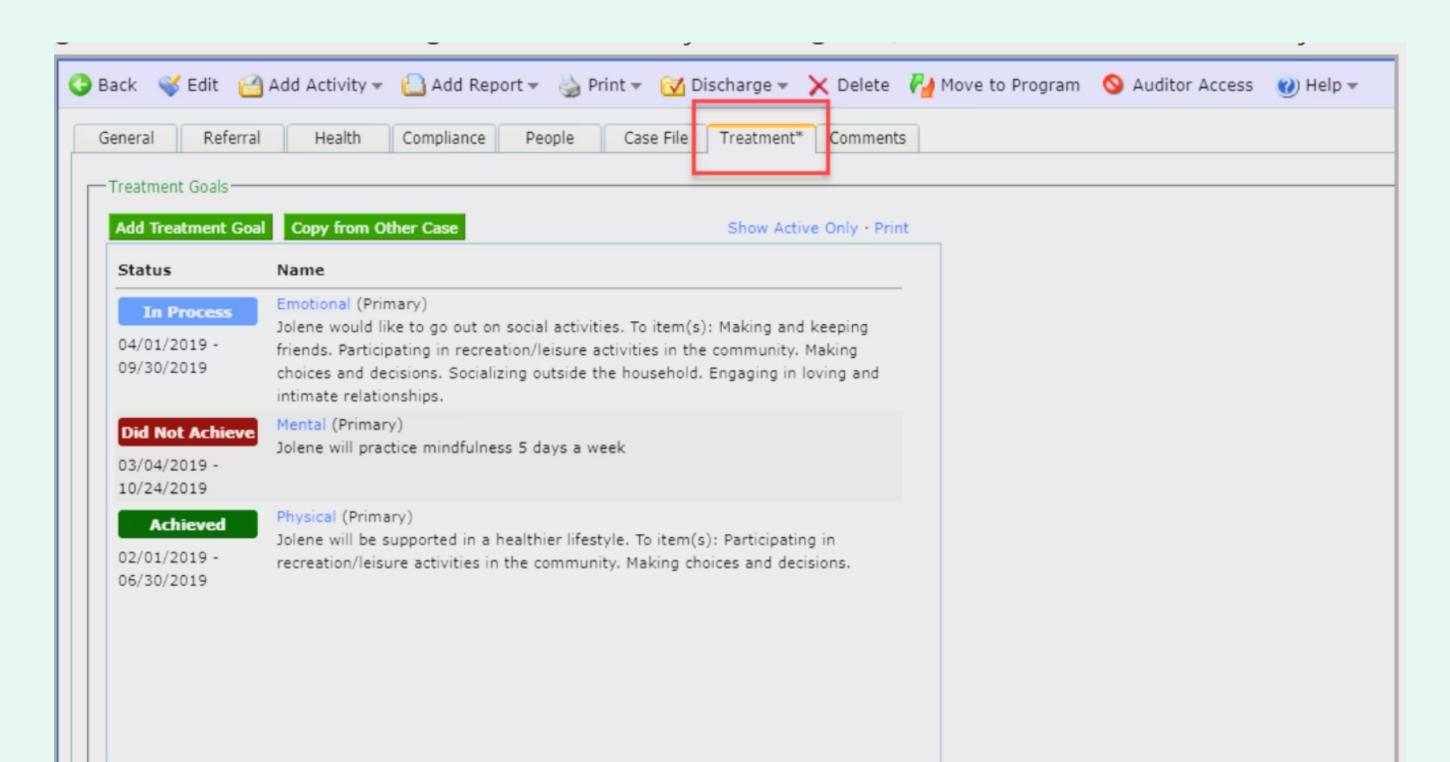
Choose what to track





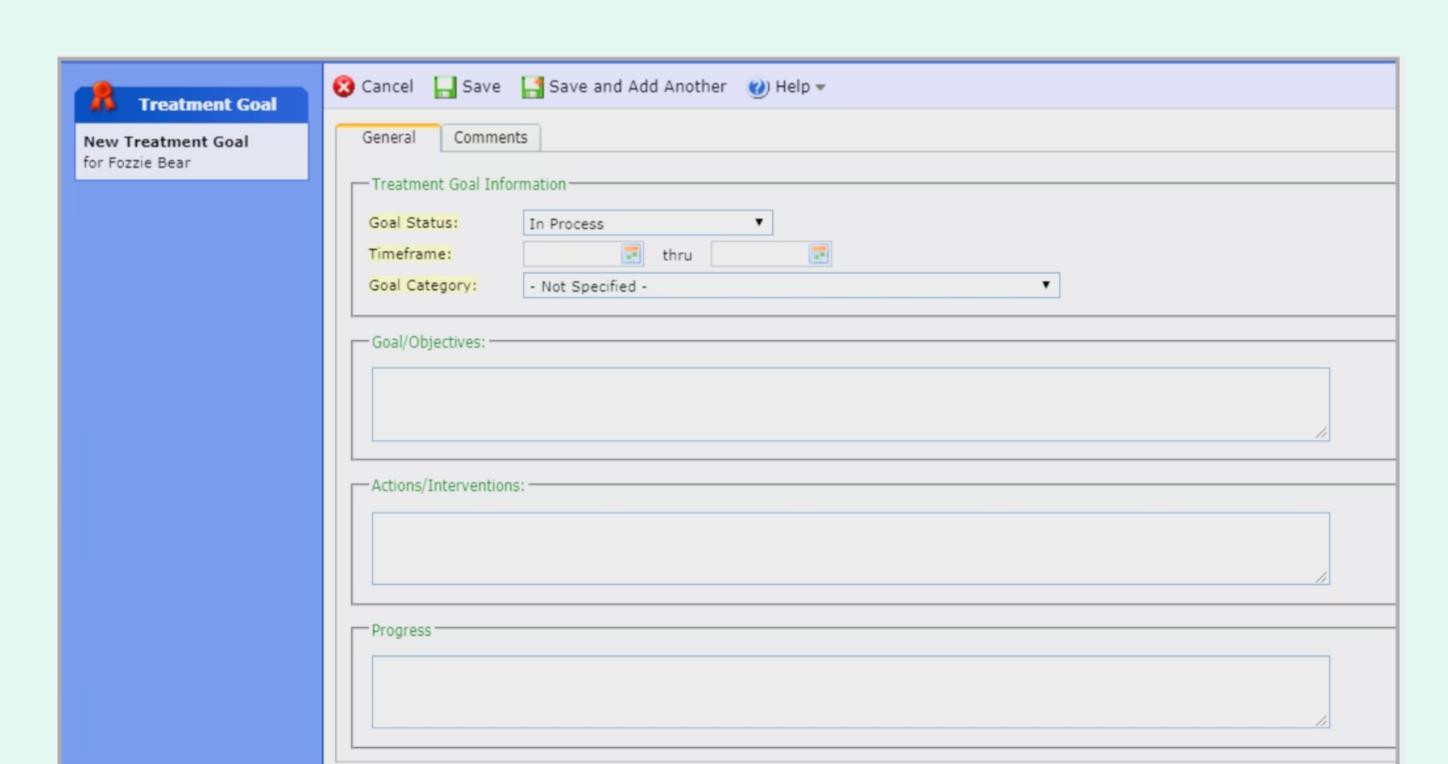
View Status Updates Anytime





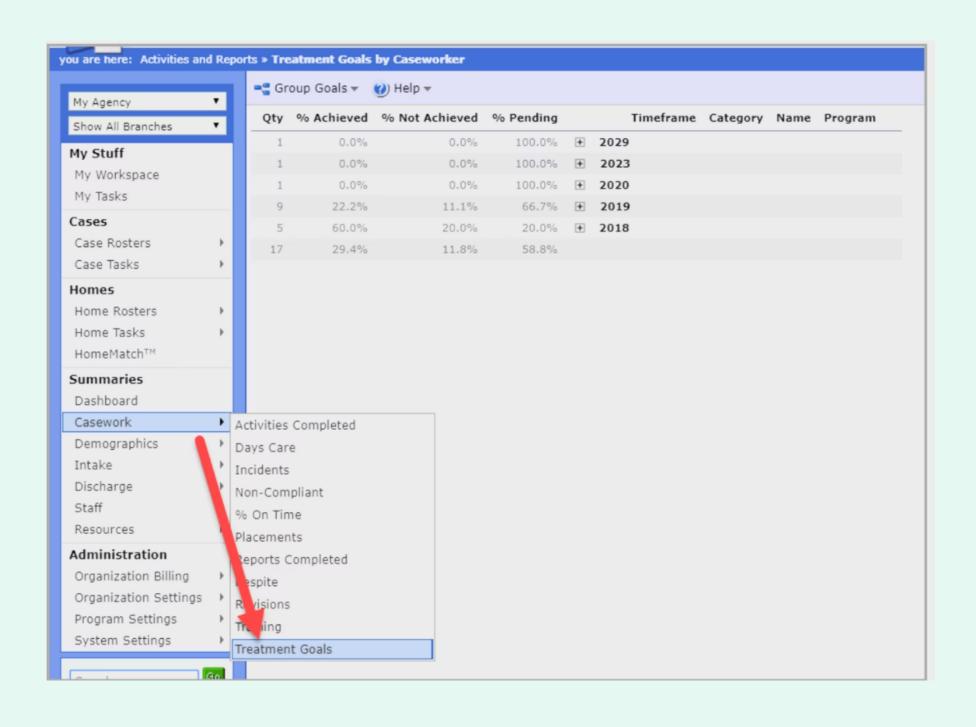
Wording and Dropdowns Configurable

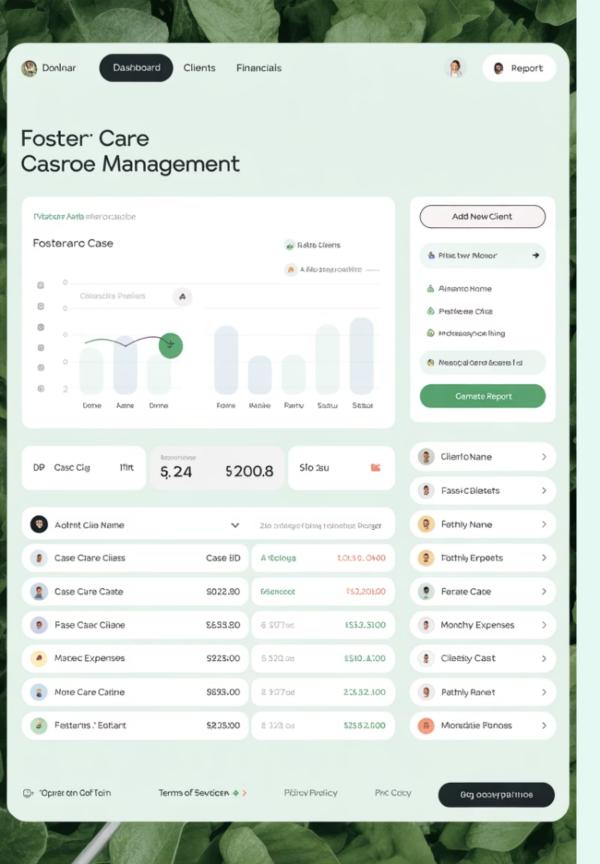




Treatment Goal Reporting





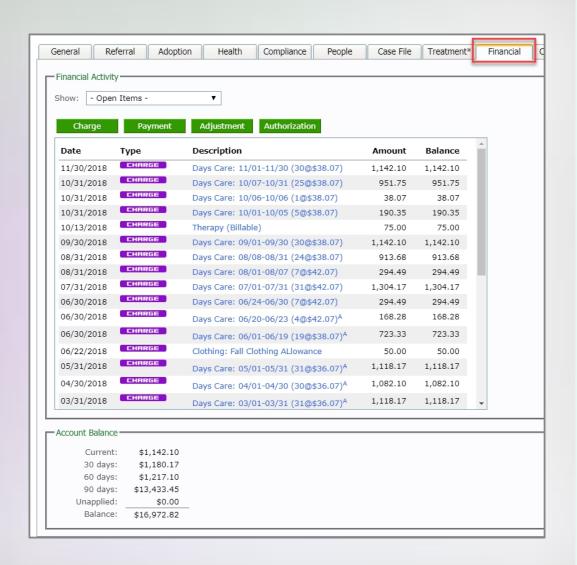




Foster Care - Case Screen: Financial Tab

This presentation covers the Financial Tab in the Foster Care Case Screen, including its layout and key components: Charge, Payment, Adjustment, Authorization, and Account Balance. The Financial Tab is only available with the Enterprise Financials add-on.







Financial Tab Layout



Overview

The Financial tab will provide an overview of all payments, charges, adjustments, and authorizations for a case.



Filtering Options

Use the "Show" drop-down to filter what items display in the Financial Activity screen.



Default Display

By default, it will display all open items.



Introduction



Purpose

This article is meant to assist you with the Financial Tab in a Case Screen. The Financial Tab is only available with the Enterprise Financials add-on.

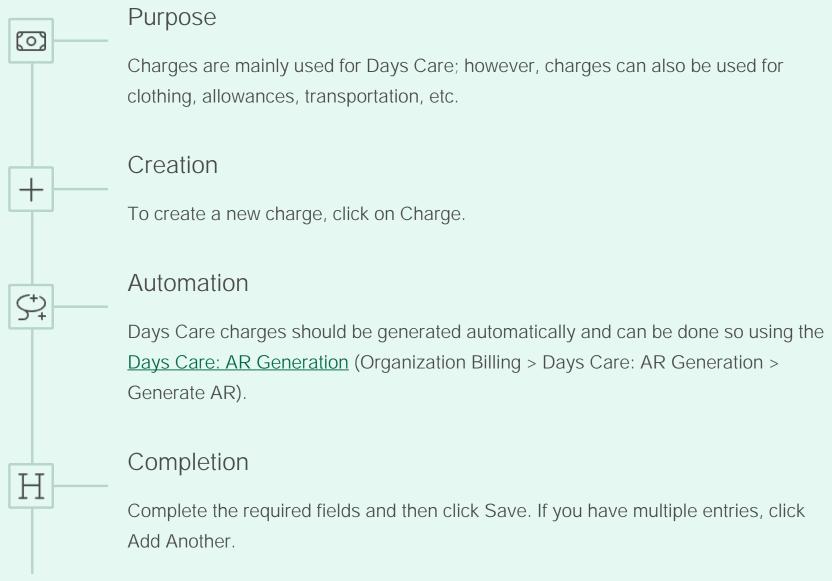
Additional Information

For more information or a demo, please contact sales@extendedreach.com.

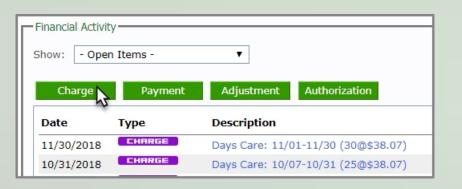
Support

If you have a question not addressed here, you can contact support at support@extendedreach.com.

Charge



The Charge screen includes fields for Charge Date, Type, Home Name, Amount, Memo, Status, Bill To, Reimburse home, and Specify quantity and rate options. Additional options are available in the Billing tab for posting charges and entering adjusted debits and credits.



Payment



Payment Information -						
Payment Date:			Status:	New		
Type: Che	eck	•	Payment From:	Kent Count		
Check #: 100	01			☐ Insurance Payment		
Amount:	\$450.00					
Memo:						
Deposit Date:		11 0				
Type	Disto					
Type	Date					
Cothing		Memo School Clathian	Amount \$100.00	Balance \$100.00	Payment	
Clothing	10/12/2017		\$100.00	\$100.00	Payment	
Client Allowance	10/12/2017 10/12/2017		\$100.00 \$50.00	\$100.00 \$50.00	Payment	
Client Allowance	10/12/2017 10/12/2017 10/12/2017		\$100.00 \$50.00 \$300.00	\$100.00 \$50.00 \$300.00	Payment	
Client Allowance Transportation Initial Clothing	10/12/2017 10/12/2017		\$100.00 \$50.00	\$100.00 \$50.00	Payment	
Client Allowance	10/12/2017 10/12/2017 10/12/2017 10/12/2017		\$100.00 \$50.00 \$300.00	\$100.00 \$50.00 \$300.00	Payment	
Client Allowance Transportation Initial Clothing	10/12/2017 10/12/2017 10/12/2017 10/12/2017 10/31/2017	School Clothing	\$100.00 \$50.00 \$300.00 \$150.00	\$100.00 \$50.00 \$300.00 \$150.00	Payment	
Client Allowance Transportation Initial Clothing Days Care	10/12/2017 10/12/2017 10/12/2017 10/12/2017 10/31/2017 10/31/2017	School Clothing 10/01-10/08 (8@\$36.07)	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56	Payment	
Client Allowance Transportation Initial Clothing Days Care Days Care	10/12/2017 10/12/2017 10/12/2017 10/12/2017 10/31/2017 10/31/2018	School Clothing 10/01-10/06 (8@\$36.07) 10/09-10/13 (5@\$47.07)	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56 \$235.35	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56 \$235.35	Payment	
Client Allowance Transportation Initial Clothing Days Care Days Care	10/12/2017 10/12/2017 10/12/2017 10/12/2017 10/31/2017 10/31/2018 10/31/2018	School Clething 10/01-10/06 (8@\$36.07) 10/09-10/13 (5@\$47.07) 10/01-10/05 (5@\$38.07)	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56 \$235.35 \$190.35	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56 \$235.35 \$190.35	Payment	
Client Allowance Transportation Initial Clothing Days Care Days Care Days Care	10/12/2017 10/12/2017 10/12/2017 10/12/2017 10/31/2017 10/31/2018 10/31/2018	10/01-10/06 (8@\$36.07) 10/06-10/13 (5@\$47.07) 10/06-10/05 (5@\$38.07) 10/00-10/06 (1@\$38.07)	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56 \$235.35 \$190.35 \$38.07 \$951.75	\$100.00 \$50.00 \$300.00 \$150.00 \$288.56 \$235.35 \$190.35	Payment	

Field Name	Description
Payment Date	Date of the payment
Туре	Select the payment type from the drop-down menu
Check Number	Enter in the check number in this field
Amount	Enter in the amount of payment received
Memo	Specify details about the charge
Deposit Date	Indicate the date the payment was deposited
Status	Displays the status of the payment
Payment From	Use the drop-down menu to indicate who the payment was from

To add a payment that has been received to the extendedReach system, click on "Payment". Complete the required fields highlighted in yellow before applying the payment. By checking the box next to a charge, the eR system will calculate your payment. Payments need to be applied to charges in order to zero out any balances.

General Billing	Comments		
— Adjustment Informa	ition —		
Adjustment Date:		Status:	Nev
Adjust:	Days Care ▼		
Type:	Days Care Increase ▼		
Apply To:	- No Charge Selected -		
Admin:	\$0.00		
Board:	\$0.00		
DOC:	\$0.00		
Other:	\$0.00		
Days Care:	0		
Memo:			

Adjustment





Purpose

Adjustments are mainly used to correct Days Care charges, either for the wrong rate or wrong placement dates; however, can be used to correct other case charges as well.



Creation

To add an adjustment to the extendedReach system, click on "Adjustment".



Completion



Complete the highlighted fields and "Save". If Days Care is being adjusted, select the Days Care charge to apply the adjustment to and enter in the amount to add to the Days Care charge (Days Care Increase) or the amount to remove from the Days Care charge (Days Care Decrease).

Field information includes Adjustment Date, Adjustment type, Type selection, Apply To field, Amount, Memo, and Status indicators.

Authorization

Purpose

If an authorization (or prior approval) has been granted by an insurance company to keep track of billable activities, click on Authorization to add the information.

Creation Process

Complete the highlighted fields and "Save". Indicate the Authorization Type the authorization can be used for and who it is from.

Management

If the authorization is no longer being used, click on the box next to "Inactive". Once saved, authorizations can be applied to their specified types in future charges.

Help ▼	
S	
tion	
Received ▼	☐ Inactive
12/26/2018	
12/26/2018	
Days Care ▼	
Kent County ▼	
No Authorization #	
	Having tro

10,01,201,		Days card 10/11 10/01 (10@\$17107)	01/120	017120
10/31/2017	CHRRGE	Days Care: 10/09-10/13 (5@\$47.07)	235.35	235.35
10/31/2017	CHARGE	Days Care: 10/01-10/08 (8@\$36.07)	288.56	288.56
10/12/2017	CHARGE	Initial Clothing	150.00	150.00
10/12/2017	CHARGE	Transportation	300.00	300.00
10/12/2017	CHARGE	Client Allowance	50.00	50.00
10/10/2017	CHARGE	Clathing, Cahaal Clathing	100.00	100.00

Account Balance



Location

The account balance will appear at the bottom of the Financial tab.



Additional Information

Additional aging account information can be found under the Financial tab on the Summaries menu > Aging Report.



Purpose

Provides a quick overview of the current financial status of the case.

Tracking Adoption Cases

by Emily Parks





Introduction to Tracking Adoption Cases



This article is meant to provide workers with an overview of tracking adoption cases in extendedReach. If you have a question not addressed here, you can contact support at support@extendedreach.com.

Purpose

Provide comprehensive guidance on tracking adoption cases in the extendedReach system

Audience

Case workers and staff managing adoption processes

Support

Contact support@extendedreach.com for additional questions

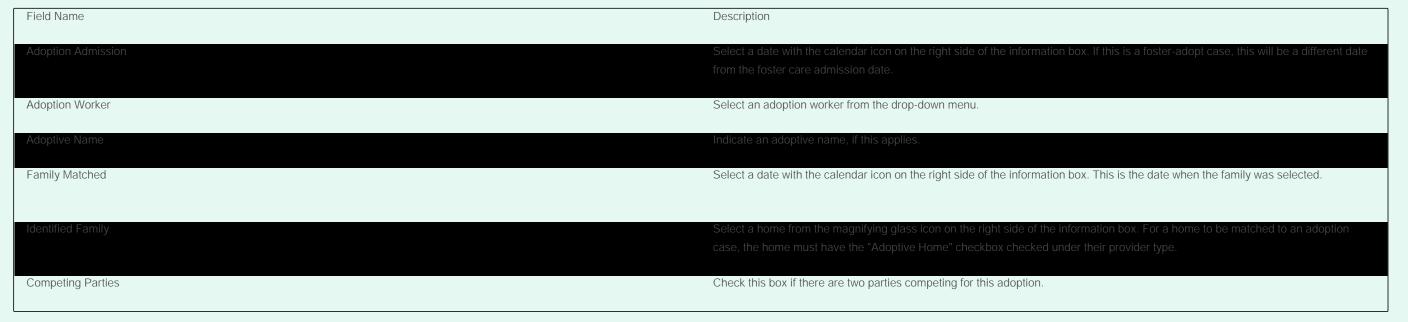
Adoption Case Information

WHISPERING PINES

This section will appear for foster-adopt and straight adoption cases.

Image: "Adoption Case Information"

General F	Referral	Adoption	Health	Comp	liance	People	Case File	Treatment*	Financial
Foster Care Ca	ase Infor	mation —							
Agency Case	#: 1	.016			Organia	tation:	Helping Hand	5	
Caseworker:	J	ane Caseworker		•	Progran	n:	Foster Care		
Therapist:	1	1ary Therapist		•			▼ Track Adop	otion Case	
Foster Admiss	sion:	08/15/2017			Catego	ry:	Routine		•
Prior Episode(s): -	Not Specified -		▼		lan Goal:	Reunification	ı	•
					Anticipa Dischar				
- Adoption Case	e Informa	tion							
Adoption Adm	nission:	04/09/2018		14 M	Fami	ly Matched	:		
Adoption Wor	ker:	George Casew	orker	•	Iden	tified Famil	y:		34
Adoptive Nam	ne:						Compe	ting Parties	





Location Information for Adoption Cases



Track where the adoption will be located or currently is located. Click on the hyperlink "Location" button to pick a adoptive home in extendedReach. The home information will automatically populate the rest of the fields.

This setting can be enabled by an Agency Administrator under Organization Preferences.

Image: "Adoption Location"

Location		
Location:	Address Line 1:	
Contact Name:	Address Line 2:	
Phone:	City:	
	State:	
	Zip:	



Location

Click on the hyperlink to access available locations which this adoption is or will be located.



Contact Name

Document the name of the contact person related to the adoptive location.



Phone

Document the phone number of the adoptive location.



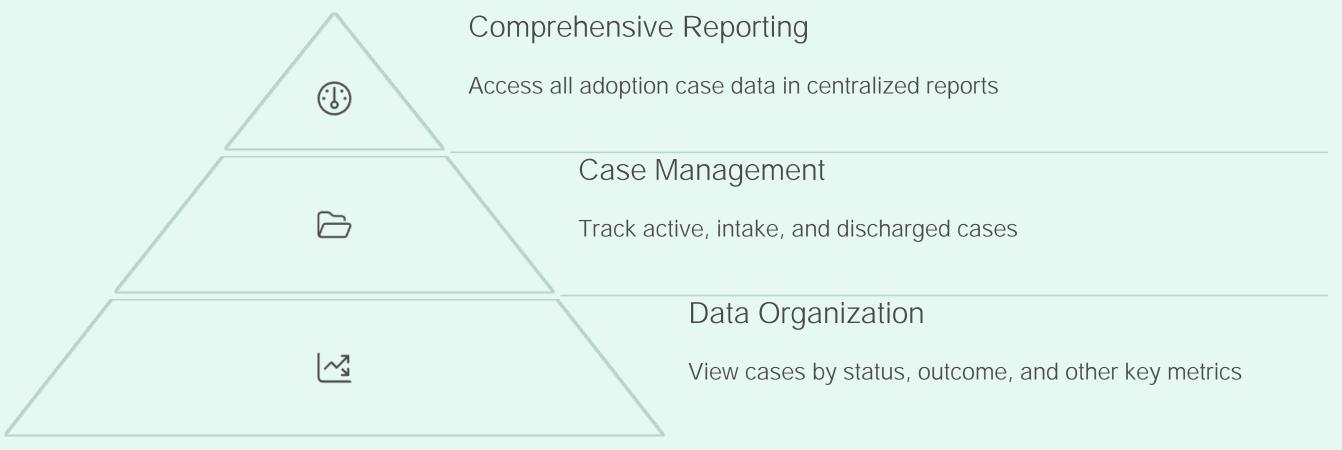
Address

Document the address of the adoptive location.



Intake and Discharge Rosters and Summaries





extendedReach provides multiple ways to view and track adoption cases through various roster and summary reports. These tools help agencies maintain oversight of all adoption cases at different stages of the process.

Case Rosters for Adoption Cases

View all open and active adoption cases by going to Case Rosters > Adoption Cases.

Image: "Case Rosters"



Navigate to Case Rosters

Access the main menu in extendedReach



Select Adoption Cases



Choose the Adoption Cases option



View Active Cases

Review all open adoption cases

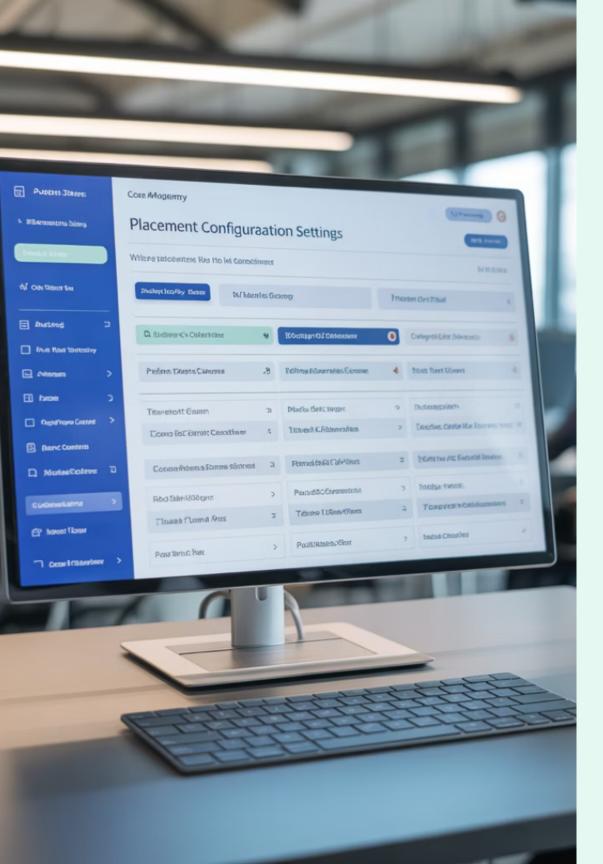






How do I place a client in a respite home or show a client is off campus and on respite leave?

by Emily Parks



Setting Up Respite Placements in extendedReach



Configuration in Program Settings

Respite placements will happen on the Placement Screen by choosing Respite in the dropdown for Placement Type and Reason for Move.

This wording is configured in Program Settings > Click Program and put into edit mode > Enter wording below in the boxes labeled 'Placement Type' and 'Reason for Move'.

Recommended Terminology

Use clear, consistent terminology in your system configuration to track respite placements accurately.

The proper setup in your program settings will ensure all respite placements are recorded correctly and can be easily reported on.

Best Practices for Respite Tracking



Use Clear Terminology

Use wording like 'To Respite' and 'From Respite' to track if they are leaving or coming back. Respite requires 2 placements. One to the respite location and one from the respite location back into the agency placement.



Record Both Movements

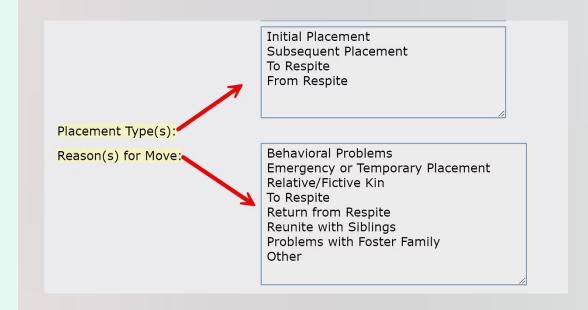
Always record both the placement to respite and the return from respite to maintain accurate records.

T3C requires respite tracking. Homes can only have 40 hrs of respite/year that is paid. Unless home is under investigation and this is an emergency placement



Plan Ahead

You can schedule future respite placements and returns in the system to ensure proper tracking.



WHISPERING PINES

Question: Minimum Standards indicate that a child can be in respite for up to 40 days - but the T3C the Blueprint indicates a paid respite program for 40 days per foster home. Since these are worded differently - is the 40 days essentially a cap for the # of paid respite days for a foster home vs. being the same as Minimum Standards? What if a foster home has 3 placements that go on respite for 14 days - does that count as 42 days of respite for the foster home - and payment to both the foster home and the respite home up to the 40 days?

Response: The rate methodology is such that if a single child is placed with the same foster home for a full 365 days, the CPA will have been reimbursed the full 40 days of dual pass-through payments for that child. In order to simplify the tracking (as per child rapidly becomes too much effort) and ensure that each foster home has adequate opportunity, it's a cap for the foster home from the day of placement (although there should be an attempt to identify how many days the child had in the prior placement to try to ensure balance and a minimum of disruption over time). One day for the foster home is one day regardless of how many children are placed there at that time because each child's rate has the dual pass-through days built in.

T3C Tracking of Respite



Troubleshooting Respite Placements

1

Problem: Missing Respite Location

I don't see the right name or location to place the client in for respite.

Solution for Foster Care Agencies

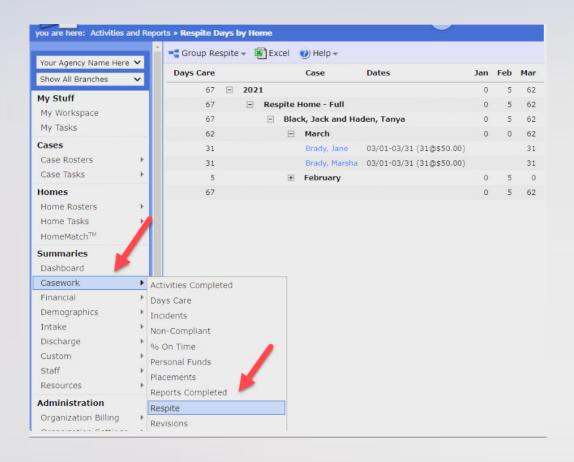
2

When you click 'Placement With', choose another family listed in the dropdown. Respite homes need to be set up as homes in order to place a client into that home. Or, you can leave the client in their current home under 'Placement With', and change the 'Placement Type' and 'Reason for Move' to Respite. Tracking by homes will be easier for billing and tracking, however.

Solution for Residential Treatment

3

For Residential Treatment or places with facilities and not foster homes, you can leave the client in their current facility under 'Placement With', and change the 'Placement Type' and 'Reason for Move' to Respite.





Tracking All Respite Placements

Access the Respite View

How can I track all of my respite placements?

Navigate to Casework Menu

On the left-hand menu hover over Casework

Select Respite Option

Click on Respite to view all current respite placements



Managing Future Respite Dates

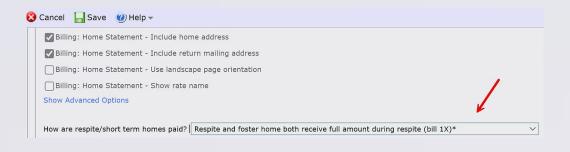
Planning Ahead

Can I place clients on respite for a future date? Can I place clients back in our organization for a future date?

Answer: Yes. If you need to adjust either placement, this can be done in the Case File Tab > Sort by Placements and click the one you need to change.

Benefits of Advance Planning

- Better resource allocation
- Improved communication with families
- More accurate reporting
- Reduced last-minute scheduling issues





Additional Resources for Respite Management



Creating Homes in the System: A Complete Guide





Managing properties effectively requires a streamlined approach to adding new homes to your system. This presentation walks you through the three primary methods for creating home entries, allowing you to choose the workflow that best suits your current task.

Whether you're starting from your workspace, working with an existing inquiry, or creating from a relationship record, you'll learn the step-by-step process to ensure accurate property records. We'll also highlight best practices to help you maintain data consistency across your database.



by Emily Parks

Method 1: Adding a Home from Workspace





Locate Add Home Button

Find the "Add Home" button positioned in the action bar of your workspace. This button serves as your starting point for creating new property records directly from the main interface.

Select Home Type

Hover over the "Add Home"
button to reveal a dropdown
menu. From here, select either
"Household" or "Other
Residence" depending on the
property type you wish to create
in the system.

Complete Required Fields

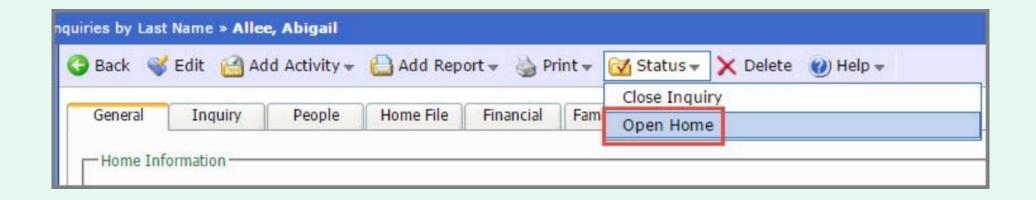
After selecting the home type, you'll be directed to the General tab containing essential property information fields. Fill out all required information accurately to ensure proper categorization and searchability.

Save the Record

Once all necessary information has been entered, click the Save button to create the new home record. The system will now make this property available for all subsequent processes and reporting.

Method 2: Creating from an Inquiry







(2)

Navigate to the existing inquiry record you wish to convert into a home. This method streamlines the process by utilizing information already captured in the inquiry.

Hover Over Status

Locate and hover over the "Status" button in the inquiry's action bar to reveal available options for this record.

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Select Open Home

From the dropdown menu, select the "Open Home" option to begin the conversion process from inquiry to property record.

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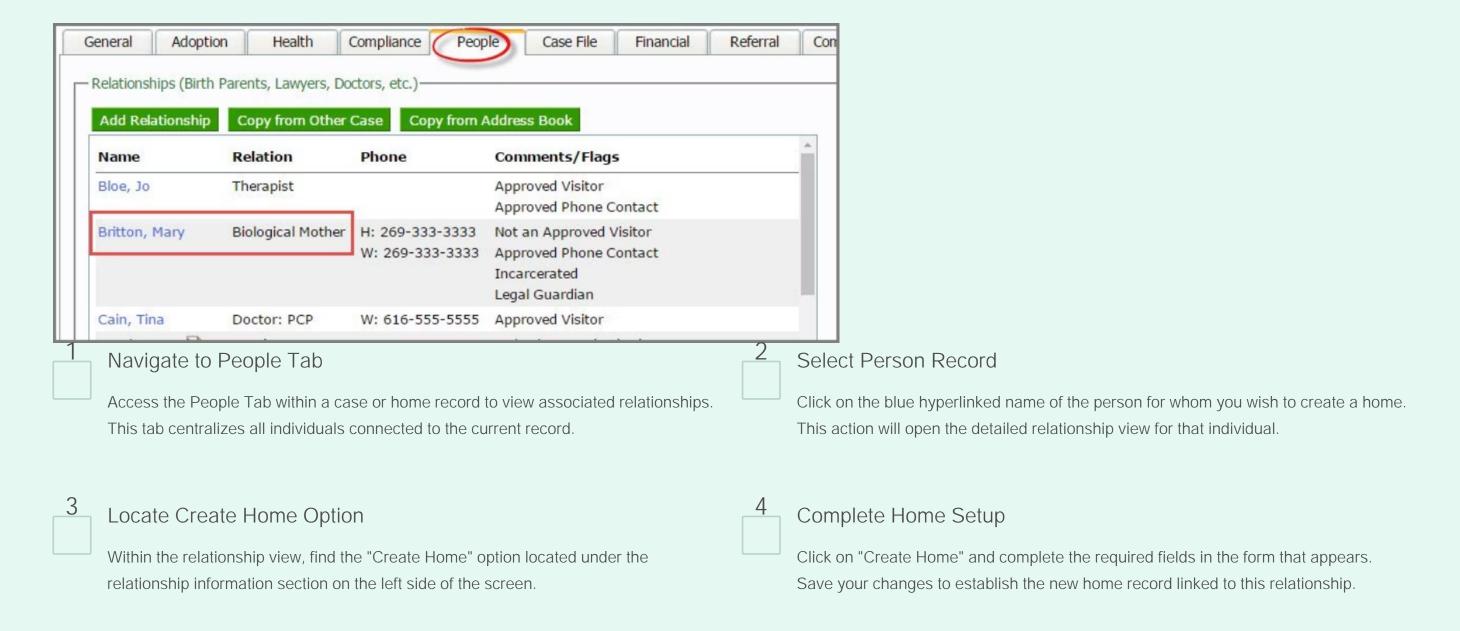
Complete & Save

Fill out all required fields on the General tab and click Save to finalize the new home record creation.

Converting inquiries to homes maintains data continuity and eliminates the need for duplicate data entry. This method is particularly efficient when working with prospective properties that have progressed to active status.

Method 3: Creating from Relationships





This method is particularly useful when you've already established a relationship record and now need to associate that person with a specific property or residence in the system.

Relationship Information Screen Details





Left Side Panel

The relationship information screen contains critical data in the left panel, including the "Create Home" link highlighted in blue. This link serves as your gateway to establishing new property records directly from relationship contexts.

Additional relationship details displayed here provide context for your home creation process, ensuring proper association between individuals and properties.

Main Content Area

The main content area displays comprehensive relationship data including contact information, relationship types, and historical interactions. This information helps inform your home creation process.

Pay special attention to address details already captured in the relationship record, as these can be utilized during the home creation process to maintain data consistency.

The relationship information screen serves as a central hub for managing connections between individuals and properties. Creating homes directly from this interface ensures proper linkage in your database and streamlines the overall workflow for property management.

Required Fields for Home Creation



General Information

- Home Name/Title
- Property Type
- Status (Active/Inactive)
- Primary Contact

Location Details

- Street Address
- City
- State/Province
- Postal Code
- Country

Property Specifics

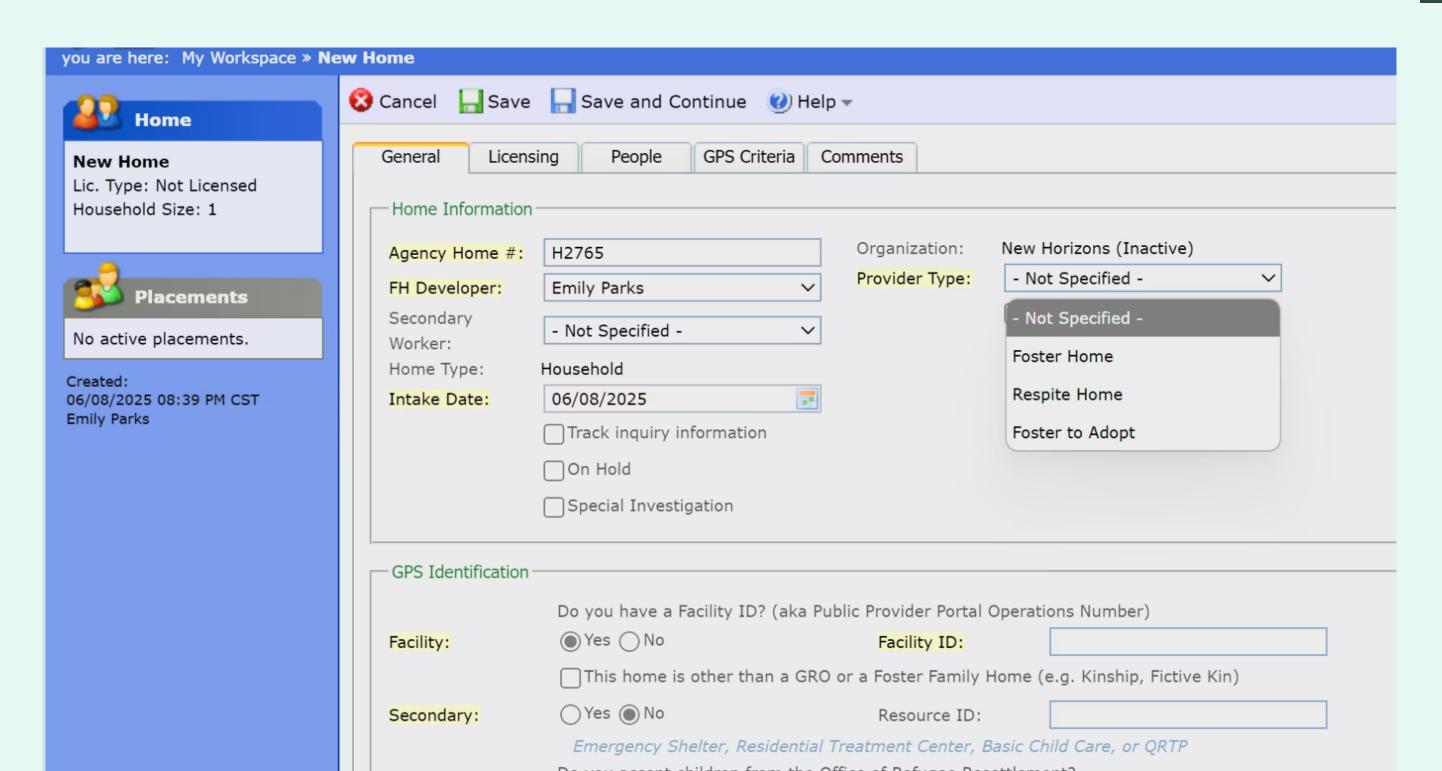
- Square Footage
- Bedrooms
- Bathrooms
- Year Built (if applicable)

Regardless of which method you use to create a home, you'll need to complete these essential fields on the General tab. The system marks required fields with an asterisk, but completing all relevant fields ensures comprehensive property records that support effective management and reporting.

Remember that complete and accurate data entry during home creation prevents the need for extensive updates later and improves overall database integrity.

Home Screen





Parent A and Parent B



ousehold Informatio	71				
Parent A			Parent B		
Last Name:			Last Name:		
First Name:			First Name:		
Middle Name:			Middle Name:		
Nickname/AKA:			Nickname/AKA:		
Mobile Phone:			Mobile Phone:		
Work Phone:			Work Phone:		
SSN:			SSN:		
Driver Lic. #:			Driver Lic. #:		
Gender:		~	Gender:	- Not Specified -	~
Race:	- Not Specified -	•	Race:	- Not Specified -	—
Ethnicity:	- Not Specified -		Ethnicity:	- Not Specified -	•
	Tribal Affiliation			Tribal Affiliation	
Religion:	- Not Specified -	ō	Religion:	- Not Specified -	4
Date of Birth:			Date of Birth:		-
Employer:			Employer:		
Occupation:			Occupation:		
Work Hours:			Work Hours:		
Employed Since:			Employed Since:		-
Education:	- Not Specified -	/	Education:	- Not Specified -	~
Birthplace:			Birthplace:		
rital Status:	- Not Specified -	Prin	n. Language: - I	Not Specified -	5
nthly Income:		=		Not Specified -	5
urch:			Language	Tot Specifica	
dress/Contact Info					
eet Line 1:		Maii	n Phone:		7
eet Line 1:			her \vee :		-

Street Line 1:			Main Phone:	
Street Line 2:			Other 🗸 :	
City:			Fax:	
State:	Texas	~	Primary E-mail:	
Zip:			Secondary E-mail:	
County:	- Not Specified -	▽		Separate mailing address
Home Information —				
# of Bedrooms:	- Not Specified -	~	Handicap. Access:	- Not Specified -
Ownership:	- Not Specified -	~	Firearms:	- Not Specified -
Basement Egress:	- Not Specified -	~	Pool:	- Not Specified - - Not Specified - - Not Specified - - V
			Smokers:	- Not Specified -
			Trampoline:	- Not Specified -
Vehicles Pets School Information				
Pets School Information				
Pets School Information School District:			Middle School:	
Pets School Information			Middle School: High School:	
Pets School Information School District:	gency Location—			
Pets School Information School District: Elementary School:	gency Location			
Pets School Information School District: Elementary School: Disaster Plan - Emer	gency Location		High School:	
Pets School Information School District: Elementary School: Disaster Plan - Emer	gency Location		High School:	
Pets School Information School District: Elementary School: Disaster Plan - Emerication Name: Street Line 1:	gency Location		High School:	
Pets School Information School District: Elementary School: Disaster Plan - Emen Location Name: Street Line 1: Street Line 2:	gency Location Texas		High School:	

Best Practices for Home Creation

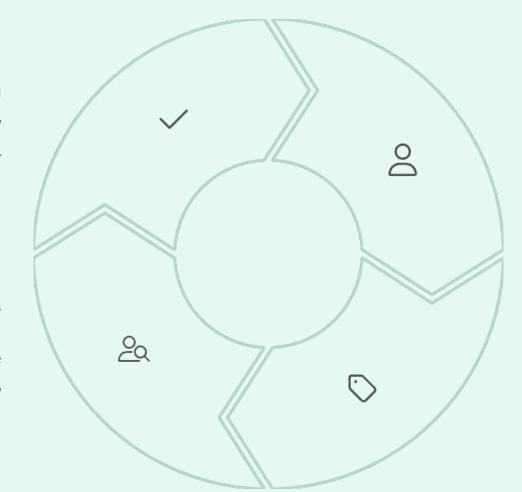


Use Consistent Naming

Establish a standard naming convention for all home records to ensure easy searching and identification across your database.

Check for Duplicates

Before creating a new home, search the database to prevent duplicate property records.



Associate All Relevant Relationships

Link all appropriate individuals to the home record to maintain complete relationship tracking.

Apply Proper Categorization

Assign accurate property types and classifications to support meaningful reporting and filtering.

Following these best practices ensures your property database remains clean, organized, and valuable for operational purposes. Consistent application of these principles across all team members further enhances data quality and reliability.

Remember that the quality of your home records directly impacts reporting accuracy, staff efficiency, and ultimately, the level of service you can provide to property owners and residents.

Summary: Choosing the Right Creation Method

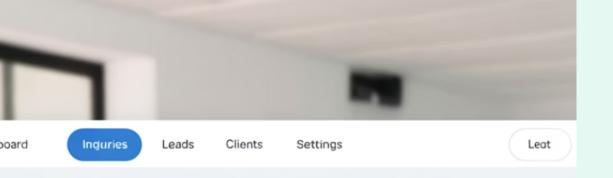


Creation Method	Best Used When	Key Advantage
From Workspace	Creating entirely new property records	Direct access from main interface
From Inquiry	Converting prospect properties to active	Preserves inquiry data history
From Relationship	Establishing properties for existing contacts	Maintains relationship continuity

Each home creation method offers specific advantages depending on your workflow and starting point. Choose the approach that minimizes duplicate data entry and maximizes efficiency for your particular scenario.

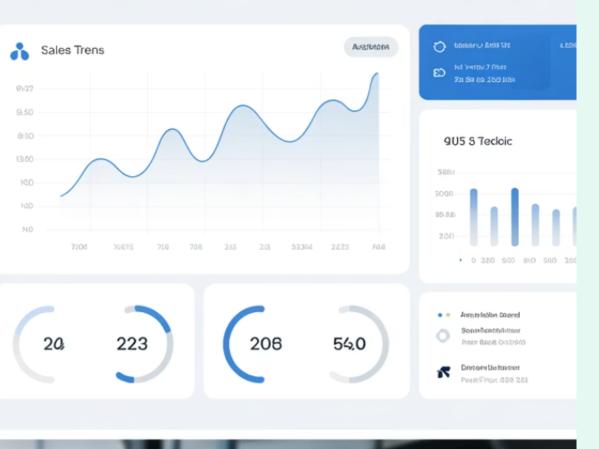
Remember that regardless of the method chosen, the end result should be a complete, accurate home record that serves as a foundation for all subsequent property management activities. Taking the time to create thorough records initially saves significant effort throughout the property lifecycle.

For additional assistance with home creation or other system functions, contact your system administrator or refer to the complete user documentation.



Home Inquiry Management

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Managing Home Inquiries in extendedReach

Welcome to our comprehensive guide on managing home inquiries within the extendedReach platform. This presentation will walk you through the entire **process—from** setting up inquiry functionality to efficiently tracking potential foster homes.

Properly managing inquiries is critical for maintaining a healthy pipeline of foster homes. Following these steps will help your agency effectively track interested families, convert qualified inquiries into homes, and maintain accurate records throughout the process.







Enabling Inquiry Functionality



Organization Settings

Inquiries must first be enabled in Organizational Settings by an Agency Administrator. This is a prerequisite for all inquiry management.



Administrator Access

Only users with administrator privileges can modify these settings. Contact your system administrator if you need this feature enabled.



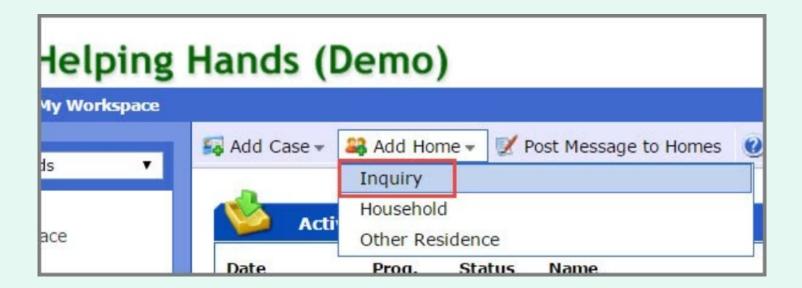
Configuration Options

Several options can be configured for inquiries, including default assignments and notification preferences.

Before you can begin processing home inquiries, your organization must activate this feature. This one-time setup ensures that your team can track potential foster families from first contact through the entire recruitment process.

Creating a New Inquiry





Access the Add Function

Hover over the "Add Home" button located on the action bar in your workspace. From the dropdown menu that appears, select "Inquiry" to begin the process.

Complete General Information

On the General tab, fill out all highlighted yellow fields at minimum. This includes basic contact information and identification details for the prospective home.

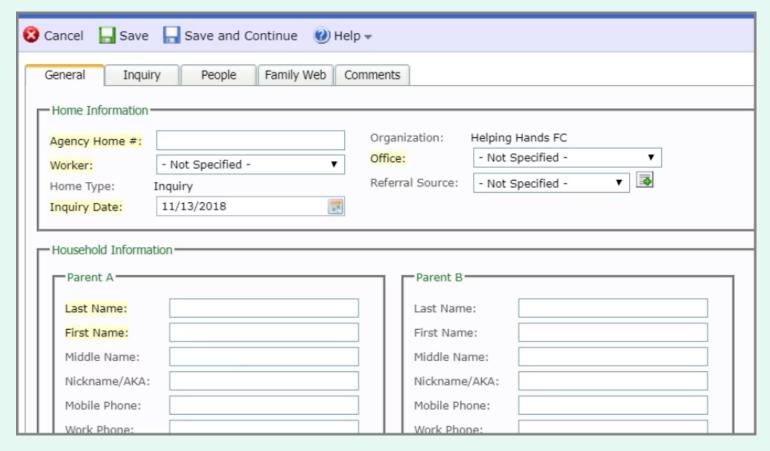
Add Inquiry-Specific Details

Navigate to the Inquiry tab to document specific information about the family's interests, how they heard about your agency, and other relevant qualification details.

Creating a thorough inquiry record ensures that your agency captures all relevant information from the beginning. This foundation will make follow-up more effective and streamline the process if the inquiry moves forward to become a licensed home.

Inquiry Form Essentials





General Tab Fields

The General tab contains essential identification and contact information:

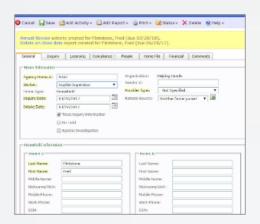
- Full name of primary contact
- Address and contact details
- Preferred contact method
- Agency branch/location
- Assigned worker

Inquiry Tab Fields

The Inquiry tab captures details specific to the family's interest:

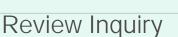
- Interest type (foster, adoption, etc.)
- Referral source
- Child preferences
- Current household members
- Next steps and follow-up plans

Accurate and complete documentation at this stage creates efficiency throughout the recruitment process. Remember that yellow-highlighted fields are mandatory and must be completed before the record can be saved. Additional fields provide valuable context that helps with recruitment decision-making.



Converting Inquiries to Active Homes





Verify all information is complete and the family meets basic qualifications



Select "Open Home"

Click the "Status" button on the action bar and choose "Open Home" from the dropdown menu



Address Requirements

Complete any highlighted due reports or activities that appear after conversion



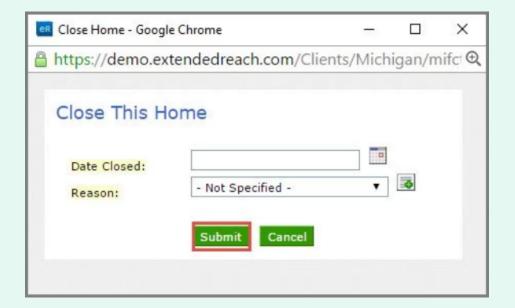
Begin Home Process

Proceed with standard home study and certification procedures

Converting a promising inquiry into an active home record allows your agency to begin the formal home study process. This transition automatically creates all required documentation and activities based on your agency's configuration, ensuring no steps are missed in the licensing process.

Managing Inquiry Closures





Initiate Closure

Click the "Status" button on the action bar and select "Close Inquiry" from the dropdown menu to begin the closure process.

Add Details

Provide specific notes about why this inquiry didn't proceed. This information is valuable for improving recruitment and screening processes.

Document Reason

In the popup window, select the appropriate closure reason from the dropdown menu. This helps track recruitment effectiveness and identify patterns.

Closure Date

Verify the closure date is accurate. This date will be used in reporting metrics about inquiry duration and conversion rates.

Properly closing inquiries that don't proceed to licensure is just as important as converting successful ones. Accurate closure data helps your agency refine recruitment strategies and identify opportunities to improve conversion rates over time.

Tracking and Viewing Inquiries



			Last Contact	Activity Type	Interested In	Inquiry Actions	Info Packet	Phone	Email	Address	Referral Source
llee, Abigail M	Nickie Caseworker	07/20/2016			Foster Care Fost-Adopt Adoption			(555) 121-2616 (Main)	dsfsdfds@sssd.com	gfdh gfdh, MI 65738	Facebook
idwell, Matt and hjh, Megan M	Nickie Caseworker	02/22/2016			Foster Care			(616) 291-7483 (Main)	fdkjfksj@sddd.com	jhj, AK jh	Facebook
linstone, Fred and Wilma L	Linda Supervisor	09/16/2015	07/26/2016	Phone Call	- Not Specified -			(303) 303-3003 (Main) (303) 303-3003 (W1) (303) 303-3003 (W2)	nickie@fowlercorp.net	7950 S. Lincoln Street Suite 101 Denver, CO 80122 Arapahoe	- Not Specified
louse, Mickey		01/18/2016	01/26/2016	First Aid	- Not Specified -			555-555-5555 (Main)	matt@softscout.com	gfh gjg f, jfgj hgjf	- Not Specified
Vhite, Snow	George Caseworker	04/29/2016			Foster Care					MI	- Not Specified -

Access Inquiry Roster

Select "Inquiries" from the Homes Rosters section under Homes in the side menu navigation.

This displays all current inquiries in a comprehensive list view.

Access Individual Records

Click on any blue hyperlinked name to access the complete home inquiry file with all details and notes.

Review Inquiry Dashboard

The Inquiry View provides a snapshot of all inquiries with their interests, planned next actions, and date of last **contact—all** critical for effective follow-up.

Filter and Sort

Use built-in filtering and sorting options to prioritize inquiries by date, assigned worker, or other relevant criteria.

Regularly reviewing your inquiry roster helps ensure that no potential foster home falls through the cracks. The inquiry dashboard is designed to highlight which families need follow-up and which are most likely to proceed to licensure based on their interests and engagement.

Online Inquiry Form Integration





Setup Configuration

Navigate to Organization Settings \rightarrow Organization Preferences \rightarrow Family Web \rightarrow Inquiries to access form settings

@ 265 \square </>

Set Default Assignments

Designate which staff member will receive new online inquiries and configure email notifications

Automatic Processing Implementation Options

Choose to use either a direct URL link or embed the form into your agency's website using the provided code

When submitted, form data creates new inquiry records without manual entry, saving staff time





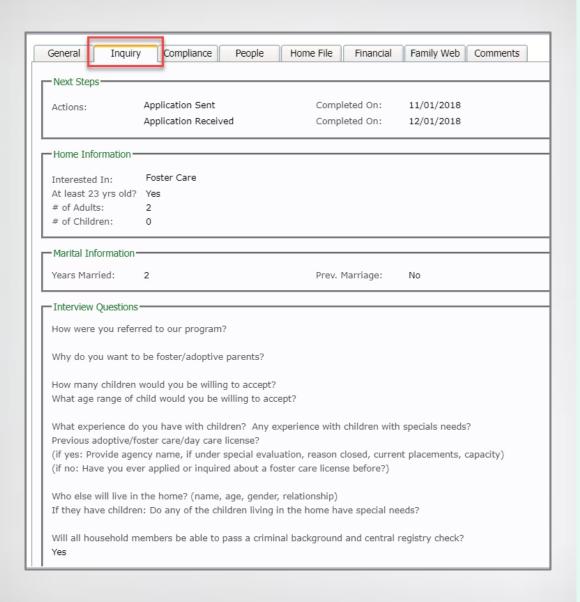
Mastering the Inquiry Tab in ExtendedReach

Welcome to your comprehensive guide to using the Inquiry Tab within ExtendedReach's Home Screen. This powerful feature helps social workers and case managers efficiently track potential foster and adoptive families before formally opening their home in the system.

Throughout this presentation, we'll explore each component of the Inquiry Tab, demonstrating how it streamlines your workflow by organizing crucial information in one accessible location. You'll learn how to track application progress, record home details, document marital information, and manage interview responses.

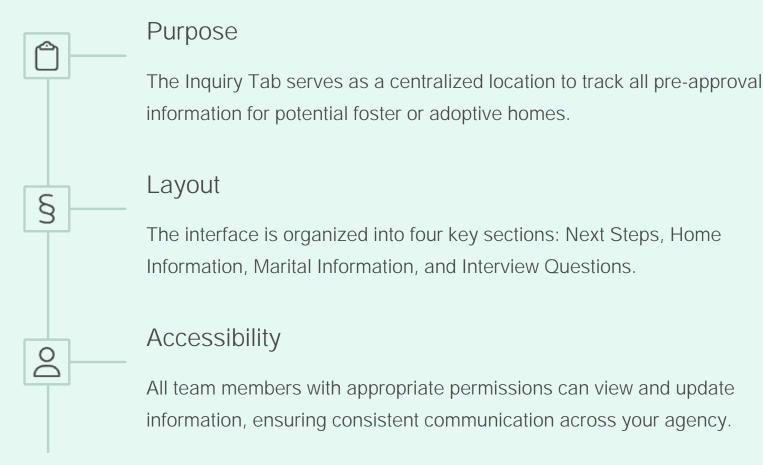


by Emily Parks

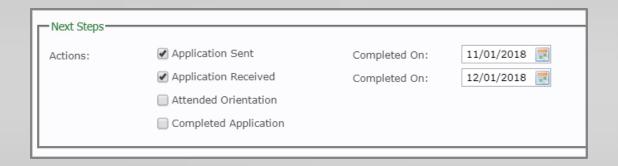


Navigating the Inquiry Tab Interface



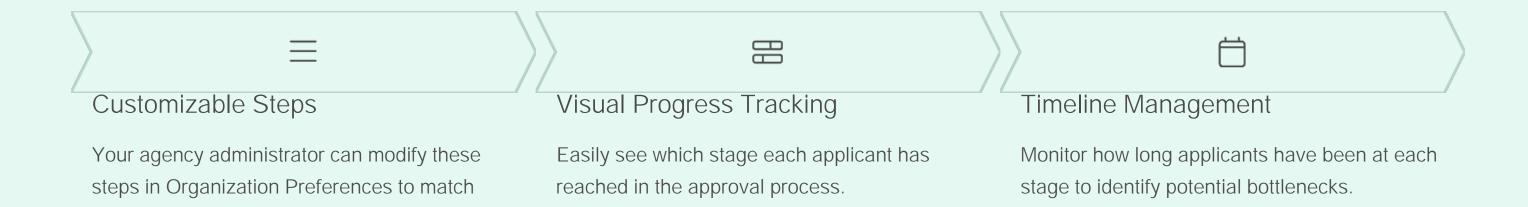


The Inquiry Tab provides a structured approach to managing potential placements before they officially enter your system. This organization helps eliminate paperwork and reduces the risk of missing important details during the early stages of family assessment.



Tracking Application Progress with Next Steps

your specific workflow.



The Next Steps section transforms your application process into a visual pipeline, allowing you to quickly assess where each inquiry stands. This feature helps ensure no potential families fall through the cracks and provides supervisors with visibility into workload distribution across your team.

- Home Information -		
Tionic Information		
Interested In:	✓ Foster Care	
	Fost-Adopt	
	Adoption	
At least 23 yrs old?	Yes ▼	
# of Adults:	2	
# of Children:	0	

Recording Essential Home Information



Placement Preferences

Document what types of placements the family is interested in receiving (foster care, adoption, respite, etc.).

Age Range Specifications

Record the minimum and maximum ages of children the family is willing to consider for placement.

Contact Information

Store primary phone numbers, email addresses, and other essential contact details for quick reference.

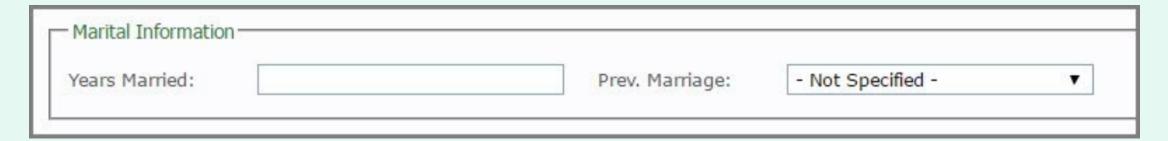
Customizable Fields

Your agency administrator can modify the "Interested In" and "At least # years old" fields to match your organization's specific needs.

The Home Information section provides a snapshot of what makes each potential placement unique. By capturing these details early in the process, you can better match children with the right environments and avoid misalignments that might disrupt placements later.

Documenting Marital Information





Marriage Duration

Record the number of years the couple has been married, which is often a critical factor in determining eligibility for certain types of placements.

Many agencies have minimum marriage duration requirements, making this field essential for preliminary screening.

Previous Marriages

Document whether either spouse has been previously married, which may require additional documentation or background checks.

This information helps identify if additional interviews or documentation may be needed regarding previous family dynamics.

Understanding a family's marital history provides important context for assessing stability and relationship dynamics. This information helps you anticipate potential challenges and identify strengths that might benefit children placed in the home. Complete documentation at this stage simplifies the formal home study process later.

Capturing Interview Responses



low were you refe	ed to our program?					
thy do you want t	be foster/adoptive p	arents?				
low many children	would you be willing	o accept?				
that age range of	child would you be wi	ling to accept?				
revious adoptive/	you have with children oster care/day care li ncy name, if under sp	cense?				
revious adoptive/ if yes: Provide ag		cense? ecial evaluation, re	sason closed, cu	irrent placement		
revious adoptive/ if yes: Provide ag	oster care/day care it ncy name, if under sp	cense? ecial evaluation, re	sason closed, cu	irrent placement		
revious adoptive/ if yes: Provide ag	oster care/day care it ncy name, if under sp	cense? ecial evaluation, re	sason closed, cu	irrent placement		
revious adoptive/ if yes: Provide ag	oster care/day care it ncy name, if under sp	cense? ecial evaluation, re	sason closed, cu	irrent placement		
revious adoptive/ if yes: Provide ag	oster care/day care it ncy name, if under sp	cense? ecial evaluation, re	sason closed, cu	irrent placement		
revious adoptive/ if yes: Provide ag	oster care/day care it ncy name, if under sp	cense? ecial evaluation, re	sason closed, cu	irrent placement		
revious adoptive/ if yes: Provide ag if no: Have you ev	oster care/day care li ncy name, if under sp er applied or inquired	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag If no: Have you ev Yno else will live in	oster care/day care if ncy name, if under sp er appilled or inquired the home? (name, as	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag if no: Have you ev tho else will live in	oster care/day care li ncy name, if under sp er applied or inquired	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag if no: Have you ev tho else will live in	oster care/day care if ncy name, if under sp er appilled or inquired the home? (name, as	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag if no: Have you ev tho else will live in	oster care/day care if ncy name, if under sp er appilled or inquired the home? (name, as	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag if no: Have you ev tho else will live in	oster care/day care if ncy name, if under sp er appilled or inquired the home? (name, as	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag If no: Have you ev Yno else will live in	oster care/day care if ncy name, if under sp er appilled or inquired the home? (name, as	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive/ if yes: Provide ag If no: Have you ev Yno else will live in	oster care/day care if ncy name, if under sp er appilled or inquired the home? (name, as	cense? ecial evaluation, re about a foster care	sason closed, cu license before?	irrent placement		
revious adoptive, if yes: Provide ag if no: Have you en Who else will live in	oster care/day care it ncy name, if under sp er applied or inquired the home? (name, as n; Do any of the child	cense? ecial evaluation, re about a foster care to a foster care gender, relations ren living in the hor	asson closed, cu license before? Ship) ship) me have special	nrent placement) needs?	s, capacity)	
revious adoptive/ if yes: Provide ag if no: Have you ex Who else will live in they have childre	oster care/day care in ncy name, if under sp er applied or inquired the home? (name, a) n: Do any of the child	cense? ecial evaluation, re about a foster care to a foster care gender, relations ren living in the hor	asson closed, cu license before? Ship) ship) me have special	nrent placement) needs?	s, capacity)	
revious adoptive, if yes: Provide ag if no: Have you en Who else will live in	oster care/day care it ncy name, if under sp er applied or inquired the home? (name, as n; Do any of the child	cense? ecial evaluation, re about a foster care to a foster care gender, relations ren living in the hor	asson closed, cu license before? Ship) ship) me have special	nrent placement) needs?	s, capacity)	

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Standardized Questions

ExtendedReach provides a set of common interview questions that help assess family readiness and identify potential concerns early in the process.



Assessment Tools

Use these responses as preliminary indicators of family strengths and areas where additional training or support might be beneficial.



Detailed Responses

Record comprehensive answers that capture nuances in how families approach challenging situations or describe their motivations for fostering or adopting.



Historical Record

Maintain a permanent record of initial responses that can be compared with later interviews to identify consistency or growth over time.

The Interview Questions section transforms casual conversations into structured assessment data. By documenting responses systematically, you build a foundation for the formal home study while identifying potential red flags or special strengths early in the process.

Implementing Best Practices



Complete All Fields

Even seemingly minor details can provide important context for placement decisions.



Ensure colleagues can access and understand key details about potential placements.



Update Regularly

Maintain current information as families progress through the application process.

Add Context

Use notes fields to provide qualitative insights beyond the standard questions.

Following these best practices ensures the Inquiry Tab becomes a valuable tool rather than just another data entry requirement. When properly maintained, this information streamlines the transition from inquiry to open home, reducing duplicate work and preventing important details from being overlooked.

Remember that the information gathered during this phase often forms the foundation of your relationship with potential foster or adoptive families, making accuracy and thoroughness especially important.

Getting Support and Next Steps



Review Organization Preferences

Work with your administrator to customize the Inquiry Tab fields to match your agency's specific workflow and requirements. Tailoring these options can significantly improve efficiency.

Develop Internal Protocols

Establish guidelines for when and how the Inquiry Tab should be completed to ensure consistency across your team. Consider creating a checklist for new staff members.

Reach Out for Support

Contact ExtendedReach support at support@extendedreach.com if you encounter technical issues or have questions about optimizing your workflow within the system.

The Inquiry Tab is designed to make your job easier by organizing critical information in a single, accessible location. By fully utilizing this feature, you can streamline your workflow, improve communication within your team, and ultimately make better placement decisions for the children in your care.

Remember that ExtendedReach continuously updates its features based on user feedback. Share your suggestions with the support team to help shape future improvements to the system.



Understanding the Home Screen: General Tab



Welcome to this comprehensive guide to the General Tab in extendedReach's Home Screen. This presentation will walk you through each section of this critical interface, explaining how to properly enter and manage home information in the system.

As social workers and agency staff, efficiently managing home data is essential for providing quality care and maintaining accurate records. Let's explore how to maximize the functionality of the General Tab to streamline your workflow and ensure compliance with documentation requirements.



by Emily Parks

Home Screen Overview



Home Information

Contains basic identifiers, worker assignments, and key dates

Household Information

Records parent details including contact information and demographics

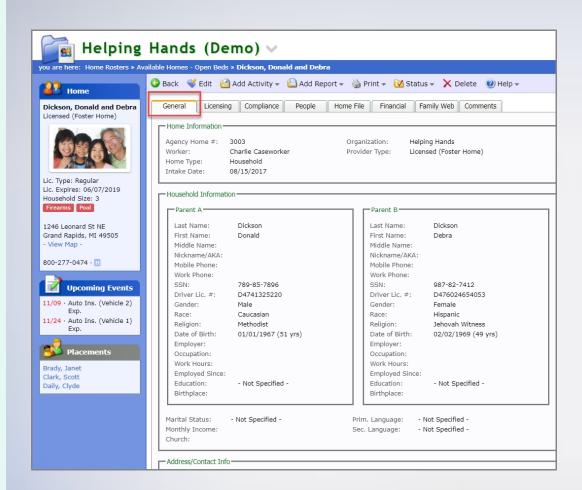
Address & Contact

Manages physical and mailing addresses plus communication details

Additional Sections

Includes home details, school information, and emergency planning

The General Tab serves as your primary interface for managing home records. Each section is designed to capture specific information needed for case management, licensing requirements, and agency reporting.



Home Information Section

Identification & Assignment

- Agency Home # Unique identifier for the home
- Worker Primary caseworker assignment
- Adoption Worker Separate worker for adoption cases

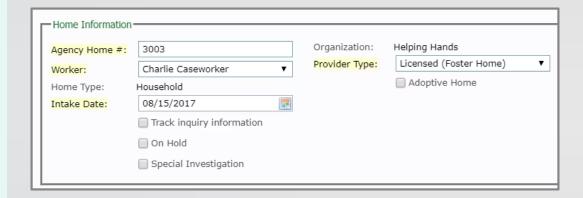
Timeline & Classification

- Inquiry/Intake Dates Track initial contact timeline
- Provider Type Reflects current status in licensing
- Home Type Based on agency-specific categories

Status Indicators

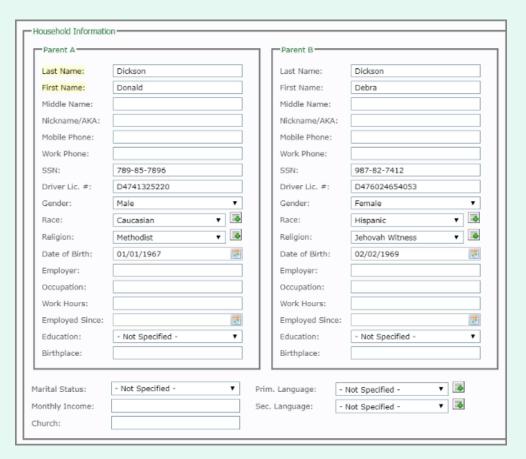
- On Hold Flag homes temporarily unavailable
- Special Investigation Track homes under review
- Track Inquiry Maintain history across status changes

This section establishes the administrative framework for each home record. Pay particular attention to Provider Type, as this classification determines available features and workflows throughout the system. The status indicators help maintain visibility on homes requiring special attention.



Household Information Details





Personal Identifiers

The system provides fields for complete demographic information for each parent, including full name, date of birth, gender, race, religion, and birthplace. These fields help with matching families to children with specific needs.

Legal identifiers like SSN and driver's license numbers are also captured here, which streamlines background check processes and verification requirements.

Employment & Income

Work details including employer name, occupation, work hours, employment date, and monthly income help assess the family's stability and availability. This information is crucial for placement decisions and support planning.

Educational background is also recorded, providing insight into the household's academic resources and potential specializations that might benefit particular placements.

Names entered in the Parent A and Parent B fields will automatically populate throughout the system, so accuracy is essential. Remember that complete household information is required for licensing compliance and helps with appropriate matching of children to homes.

Address/Contact Info	0		
Street Line 1:	1246 Leonard St NE	Main Phone:	800-277-0474
Street Line 2:		Other ▼ :	
City:	Grand Rapids	Fax:	
State:	Michigan ▼	Primary E-mail:	DonaldD@mailinator.com
Zip:	49505	Secondary E-mail:	
County:	Kent ▼ 3		Separate mailing address

Address and Contact Management





Physical Address

Enter the home's physical location, including street address, city, state, and county. This information is used for home visits, geographic reporting, and jurisdiction determination.



Mailing Address

When different from the physical address, check "Separate mailing address" to reveal additional fields. This ensures communications reach the family correctly.



Contact Methods

Multiple contact methods (main phone, work phone, fax, primary and secondary email) ensure you can reach families through their preferred channels.

Maintaining accurate address and contact information is critical for agency communications, emergency notifications, and compliance mailings. The system allows tracking of both physical and mailing addresses to accommodate families with P.O. boxes or other special mailing needs.

Home Physical Information



Bedrooms

Track bedroom count and details for capacity assessment and compliance



Vehicles

Document transportation resources for home visits and activities

Accessibility

Note handicap access and other accommodation features

Pets

Record pet information for placement compatibility and safety considerations

The Home Information section captures physical characteristics that impact placement decisions. The number selected for bedrooms, vehicles, and pets will dynamically generate additional detail fields below. For agencies using Advanced Pet and Vehicle Management, more comprehensive tracking options are available.

These details are especially important for licensing requirements and help determine the home's capacity and suitability for specific placements, particularly for children with special needs or accessibility requirements.

	N CONTRACTOR SOCIETY	The Control Action and	The second secon
School District:	Rockford Public	Middle School:	North Rockford
Elementary School:	Belmont	High School:	Rockford

School and Education Information





School District

Record the nearest school district serving the home's location, essential for educational planning and coordination.



School Levels

Document the names of closest elementary, middle, and high schools for educational continuity planning.



Transportation Planning

Understanding school proximity helps assess transportation needs and logistics for school attendance.

Educational stability is a critical factor in successful placements. This section helps caseworkers plan for educational continuity when placing children, supporting efforts to maintain school stability whenever possible. Complete school information also facilitates coordination with educational liaisons and school district personnel.

While the system captures basic school proximity information, remember to document specific educational needs and accommodations in the child's education plan for comprehensive educational support.

Emergency Planning and Communication Preferences



Į.	Disaster Planning Record emergency location information for crisis situations			
	\supseteq	Mailing Preferences Set options for agency of	ommunications and address validation	
			Technical Support Contact support@extendedreach.com for additional assistance	

The Disaster Plan section becomes available when enabled in Organization Preferences. This critical information ensures you can locate families during emergencies or natural disasters. Complete and up-to-date emergency location data supports agency disaster response protocols and continuity of care.

The Mailing List Preferences section allows you to document communication restrictions and address issues. Use "Do not include in mailing list" for families who opt out of agency mailings, and "Returned mail - bad address" to flag homes with delivery problems that require address verification.



Foster Home Licensing: From Inquiry to Placement



Welcome to our guide on the foster home licensing process. This presentation will walk you through the complete lifecycle of establishing a foster home—from the initial inquiry stage through application and finally to full licensing status.

Understanding this process is essential for all social workers and agency staff involved in expanding the network of qualified foster homes. We'll provide step-by-step instructions for navigating the ExtendedReach system to manage each phase efficiently.

If you have specific questions not covered in this presentation, please contact support at support@extendedreach.com.



Understanding the Licensing Journey



Inquiry Phase

Initial contact with prospective foster parents exploring the possibility of becoming licensed

Application Phase

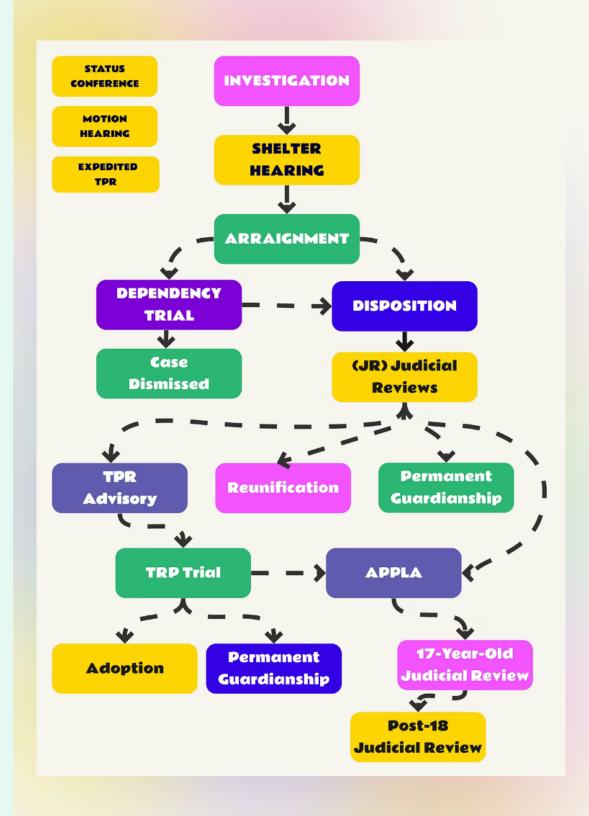
Formal petition process where interested families submit required documentation

Licensing Phase

Final authorization allowing homes to accept foster child placements

The foster home development process follows these three distinct phases. Each stage builds upon the previous one, with specific requirements and documentation needed before advancing. Understanding the complete journey helps social workers guide prospective families through what can sometimes be a complex process.

Throughout this presentation, we'll examine each phase in detail, providing practical guidance for managing homes at every stage using the ExtendedReach system.



Managing the Inquiry Process



Access the Add Home Function

Hover over "Add Home" in your action bar on your workspace, then select "Inquiry" from the dropdown menu

Complete Initial Information

Enter prospective foster parents' contact details and preliminary information about their interest and home situation

Document Interview Responses

Record answers to standardized inquiry questions and schedule follow-up actions as needed



Inquiries represent the initial stage where prospective families are exploring the possibility of becoming foster parents. This exploratory phase allows both the agency and the family to determine if pursuing licensing is appropriate.

To view all current inquiries in your system, hover over "Home Rosters" in the navigation menu and select "Inquiries." This will display all homes currently in the inquiry phase, allowing for efficient follow-up and management of the prospective foster parent pipeline.

Working with Home Inquiries





Accessing Inquiries

Hover over Home Rosters in the main navigation and select "Inquiries" to view all prospective homes in this phase



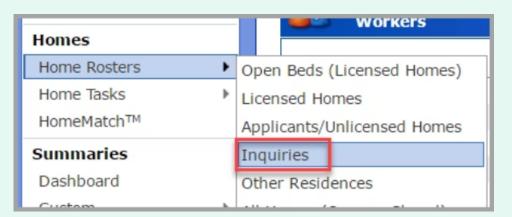
Tracking Interview Questions

Record responses to standardized inquiry questions to evaluate suitability for fostering



Managing Next Steps

Document and track workflow tasks to ensure all inquiry requirements are completed

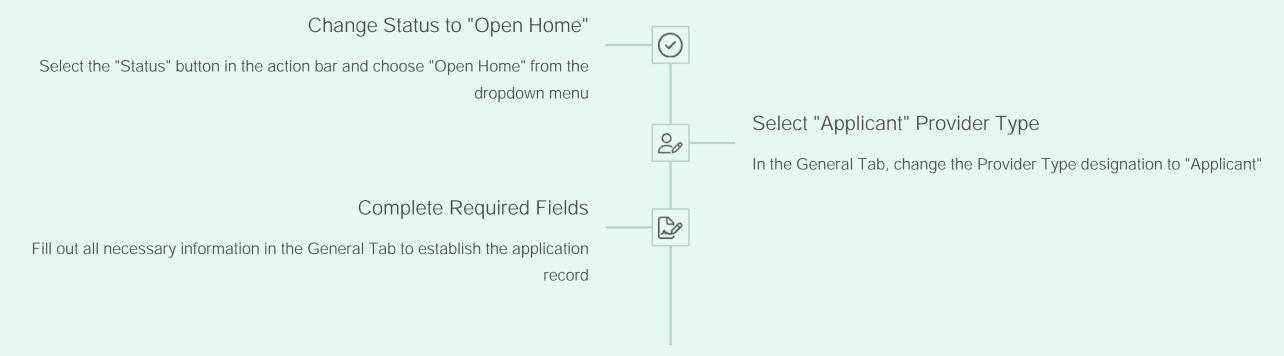


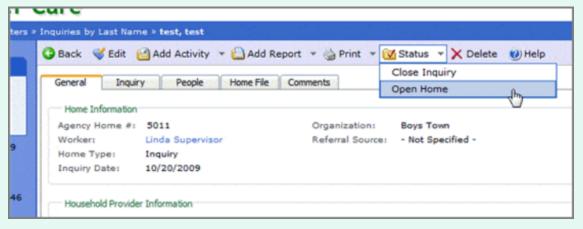
The inquiry management process provides structure for the initial evaluation of potential foster parents. During this phase, staff should focus on gathering preliminary information, answering questions about the fostering process, and helping families understand the commitment involved.

Thorough documentation during the inquiry phase creates a foundation for the application process if the family decides to move forward. It also helps identify potential concerns early in the process, saving time and resources for both the agency and the prospective family.

Moving from Inquiry to Application







When a prospective family decides to formally pursue foster parent licensing, you'll transition them from the Inquiry phase to the Application phase. This represents a significant step in their journey and requires more detailed documentation and assessment.

During the application phase, families begin completing formal documentation, background checks, home studies, and training requirements. The ExtendedReach system helps track all these components, ensuring that nothing is overlooked in the licensing process.

Managing Applications in Progress



Application Documentation

Track submission of required forms, background checks, references, and financial verification through the system

Home Study Process

Schedule and document home visits, interviews with family members, and safety assessments of the physical home environment

Training Requirements

Monitor completion of mandatory training hours and specialized education modules required for certification

To access all homes currently in the application phase, navigate to "Home Rosters" and select "Applicants/Unlicensed Homes." This view allows you to monitor the progress of all applications in process at your agency.

The application phase typically takes several months to complete as families work through various requirements. During this time, social workers should maintain regular contact with applicants, providing support and guidance to help them successfully complete all licensing components.

Clear documentation in the system helps track each family's progress and identifies any potential barriers to licensing that may need to be addressed.

Completing the Licensing Process



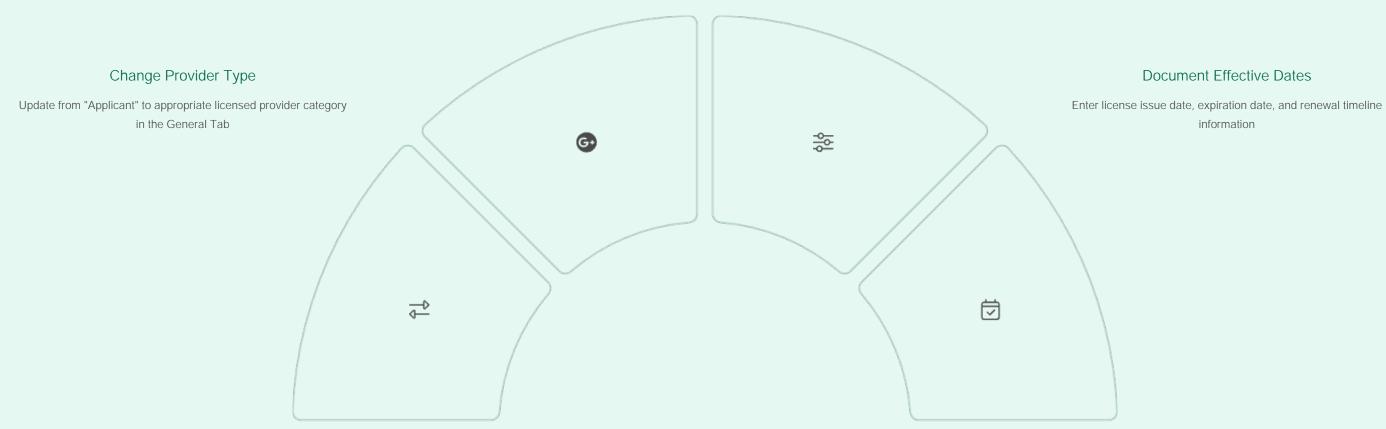
information

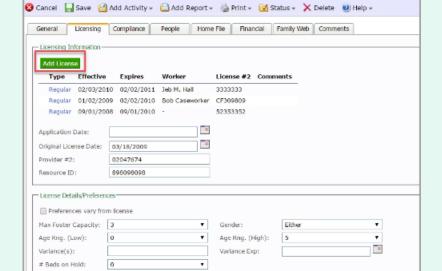
Add License Details

Navigate to Licensing Tab and click "Add License" to create the official license record

Set Placement Parameters

Establish capacity limits, age ranges, gender preferences, and specialized capabilities





Maintaining Licensed Foster Homes



365

90

30

Days Until Renewal

Days Before

Days Between

Standard license duration before renewal required

Recommended timeline to begin renewal process

Suggested frequency for home check-ins

Once homes achieve licensed status, they can be accessed through the "Licensed Homes" option under Home Rosters. This view displays all currently active foster homes available for placements.

Licensed homes require ongoing monitoring and support to maintain compliance with regulations. Regular check-ins, documentation of any changes to the home environment, and tracking of additional training are all important aspects of licensed home management.

The licensing renewal process should begin well before the expiration date to ensure continuity. ExtendedReach can help by generating reports of upcoming renewals, allowing staff to proactively work with foster families to complete necessary requirements and maintain their licensed status without interruption.

Advanced Pet and Vehicle Management Guide

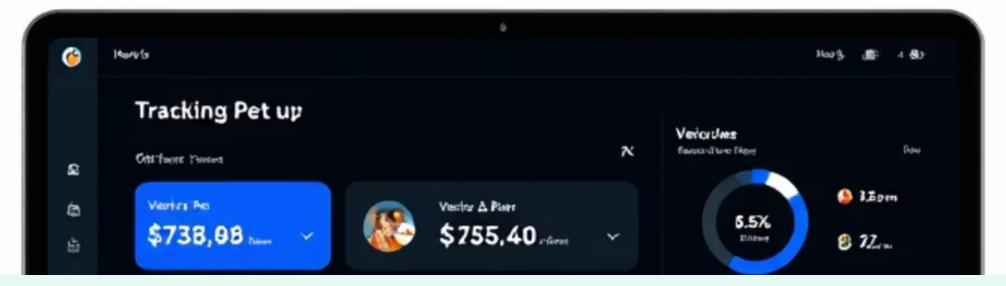
Welcome to the comprehensive guide on managing pets and vehicles within our system. This presentation will walk you through how to activate, configure, and utilize the advanced management features for tracking both pets and vehicles associated with your homes.

Our platform allows you to add unlimited pets and vehicles, helping you maintain complete records with customized reporting options. Throughout this guide, you'll learn the step-by-step processes needed to successfully implement these features across your organization.

If you have questions beyond what's covered here, please reach out to our support team at support@extendedreach.com.

by Emily Parks





Understanding the Benefits



Unlimited Tracking



Clear Identification



Historical Records



Compliance Management

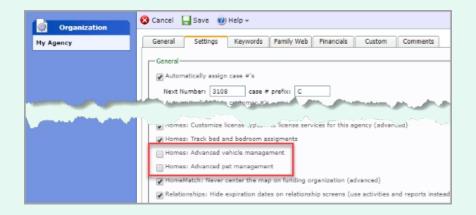
Add as many pets and vehicles as needed with no system limitations

Pet and vehicle names appear alongside reports for easy reference

Maintain active and inactive records for complete historical documentation

Track required documentation with expiration dates and alerts

The advanced management system integrates seamlessly with your existing workflows, allowing for comprehensive tracking similar to how you manage household member documents or trainings. This approach ensures all critical information is organized and accessible when needed.



Enabling Advanced Management Features

Access Organization Settings

Navigate to the Organization
Settings section of your admin
panel to begin the setup process

Open Organization Preferences

Within Organization Settings, select the Organization
Preferences option to view available system configurations

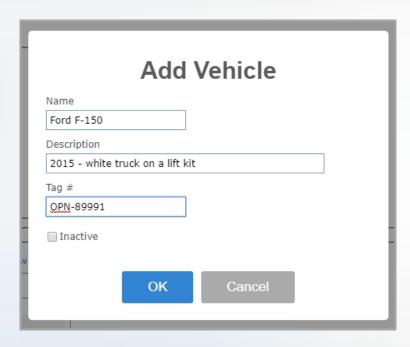
Configure Settings

Locate and enable "Homes:
Advanced vehicle management"
and "Homes: Advanced pet
management" checkboxes

Verify Activation

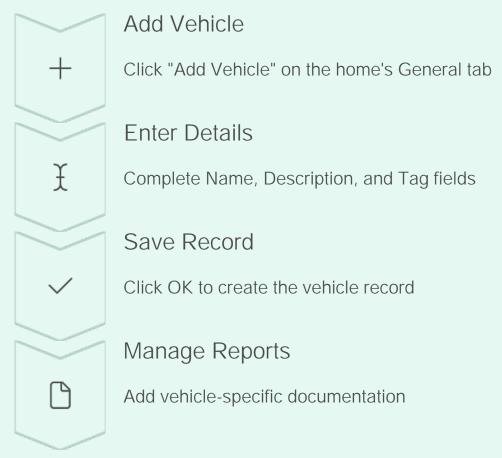
Navigate to any home record and confirm that the Vehicles and Pets sections now appear on the General tab

Once activated, these features become immediately available across your entire organization. The settings apply globally, allowing all authorized users to access and utilize the pet and vehicle management capabilities within their assigned homes.



Adding and Managing Vehicles





When adding vehicles, be specific with descriptions to easily identify each one. The Tag field can be used for license plate numbers, vehicle identification numbers (VIN), or other unique identifiers. This information will help distinguish between multiple vehicles within the same home.

Vehicle records remain accessible on the home's General tab, where they can be edited or marked as inactive as needed. This flexibility ensures your records stay current even as a family's vehicle inventory changes over time.

Vehicles Vehicle Registration (Dodge Ram 3500) Expires 11/26/2021 : Vehicle Registration (Ford F-150) Add Report Vehicle Registration (Maserati Exp. soon 10/31/2019 : GranTurismo)

Configuring Vehicle Reports

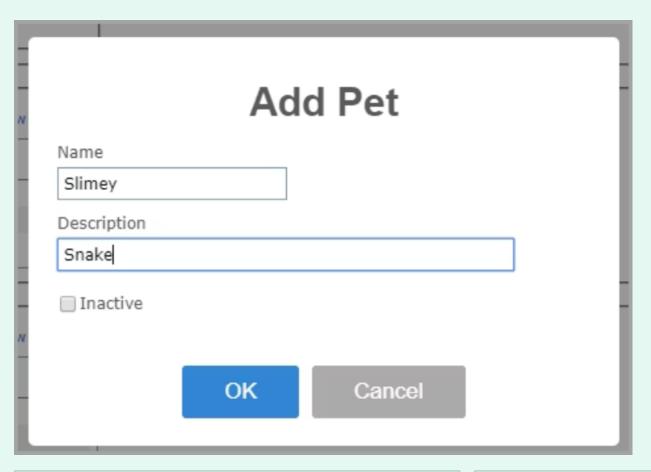




Common vehicle report types include insurance verification, registration documents, safety inspections, and maintenance records. Each report will display with the vehicle name for clear identification. This association helps staff quickly identify which documents belong to which vehicle, especially in homes with multiple vehicles.

Adding and Managing Pets





Creating Pet Records

- Navigate to a home's General tab
- Scroll to the Pets section
- Click "Add Pet" button
- Enter Name and Description
- Click OK to save the pet record

Pet Information Tips

- Include species in the description
- Note breed information when relevant
- Consider adding age or size details
- Include special needs or behaviors

Managing Inactive Pets

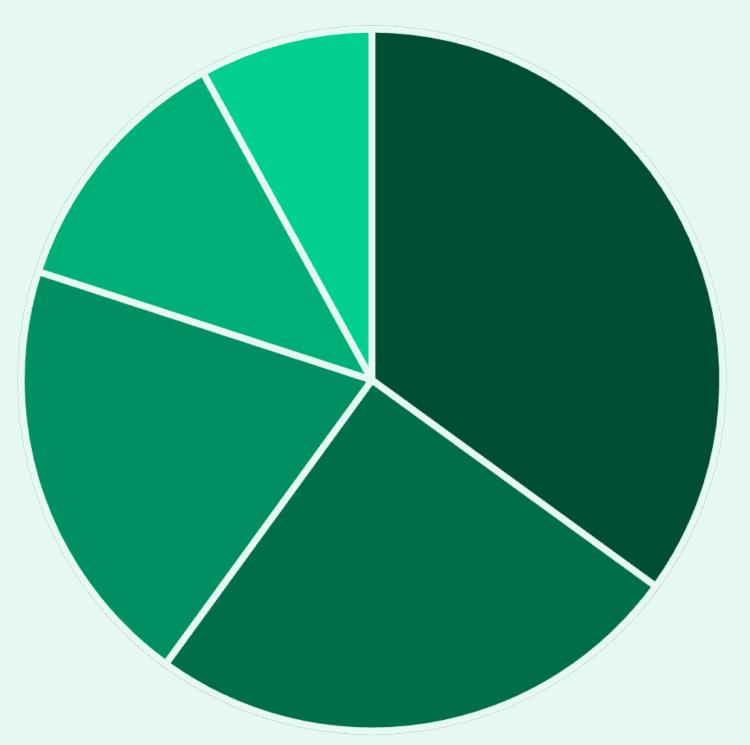
- Click on pet's hyperlinked name
- Check "Inactive" box
- Click "Show Inactive" to view all inactive pets
- Maintain historical records even for departed pets

The pet management system allows for detailed tracking of all animals in a foster home. This capability is particularly important for agencies that need to document pet vaccination records, temperament assessments, or other pet-related compliance requirements that might impact child placement decisions.

Configuring Pet Reports

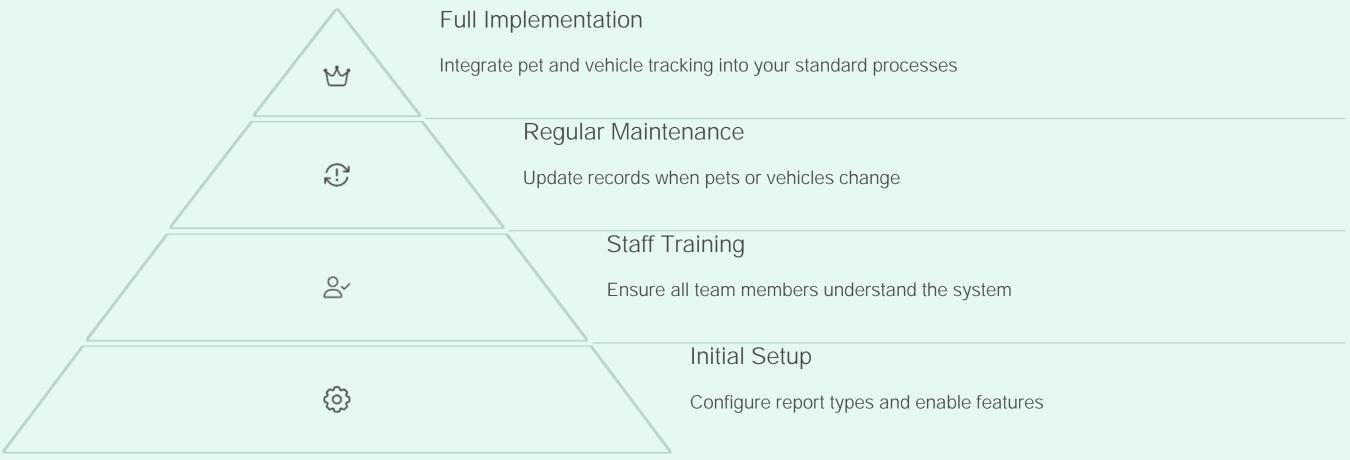






Best Practices and Next Steps





For the most effective implementation, begin by documenting all current vehicles and pets across your homes. Create a standardized approach to naming and describing these assets to ensure consistency throughout your organization. Consider developing a regular review process to verify all information remains current.

Remember that complete pet and vehicle documentation contributes significantly to comprehensive safety assessments. By maintaining accurate records, you're helping ensure the safety of children placed in these homes while also protecting your organization through proper compliance management.

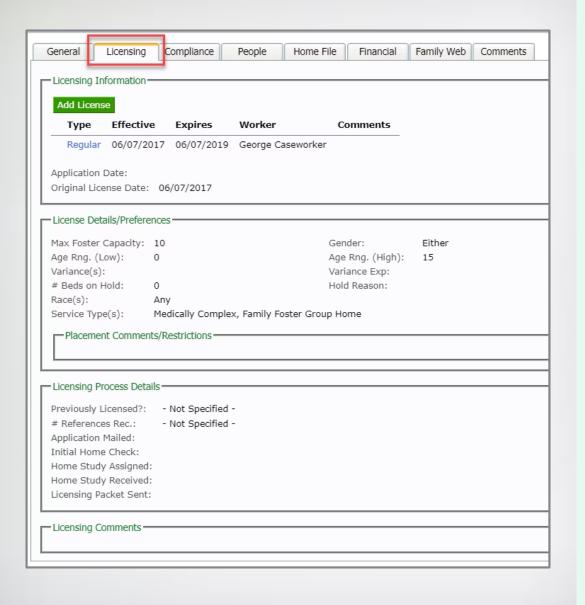
Navigating the Home Screen Licensing Tab: Complete User Guide

Welcome to your comprehensive guide to the Licensing Tab in the Home Screen. This essential feature allows social workers and case managers to efficiently record, track, and manage home licenses, approvals, and certifications within the Extended Reach system.

Throughout this presentation, we'll walk through each component of the Licensing Tab, providing step-by-step instructions and practical tips to streamline your workflow. Whether you're new to the system or looking to enhance your existing knowledge, this guide will help you maximize the functionality of this important tool.

by Emily Parks





Understanding the Licensing Tab Layout





Central Location

The Licensing Tab serves as your central hub for all licensing information related to a specific home or family.



Add License Button

Prominently displayed to allow quick creation of new license records with just one click.



License Overview

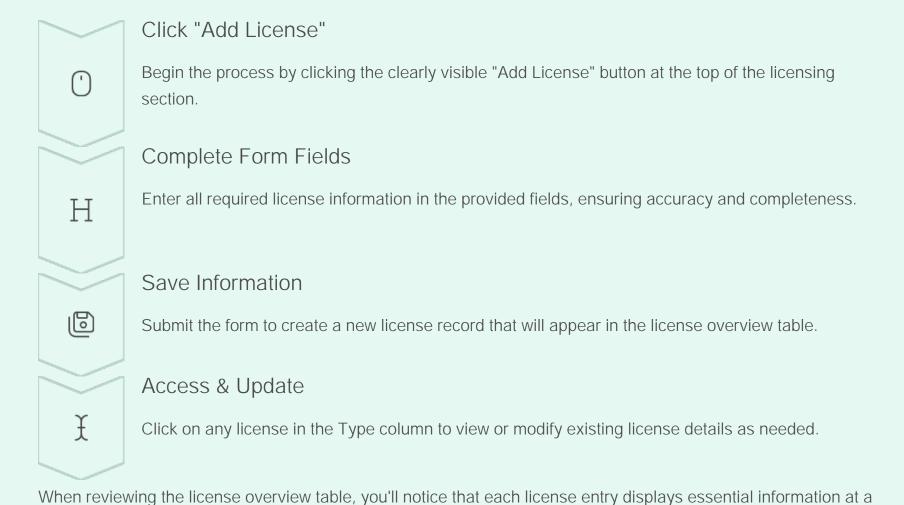
View all existing licenses in a clean, organized table format with key information displayed.



Quick Access

Blue hyperlinked text under the "Type" column provides immediate access to detailed license information.

Adding New Licensing Information



glance, including type, approval date, and expiration date. This organized layout helps you quickly identify

licenses that may be nearing expiration or require updates.

General Licensing Compliance People Home File Financial

Licensing Information

Add License

Type Effective Expires Worker Comments

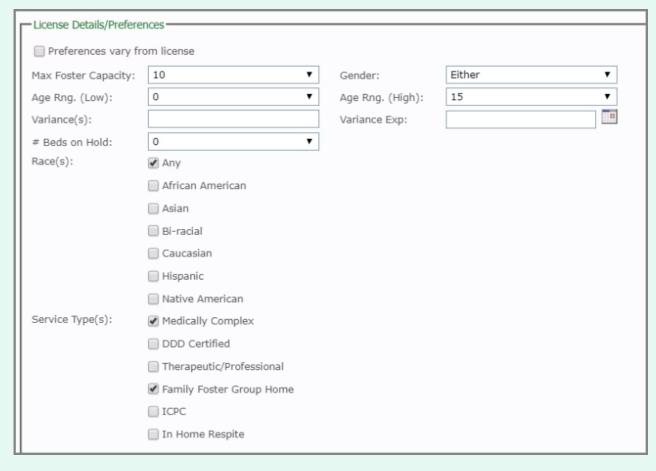
Regular 06/07/2017 06/07/2019 George Caseworker

Application Date:

Original License Date: 06/07/2017

Configuring License Details & Preferences





Capacity Settings

Define the maximum number of children the home is authorized to accommodate, ensuring compliance with local regulations and home study recommendations.

This critical information helps prevent overplacement and maintains appropriate supervision ratios for the safety and wellbeing of placed children.

Demographic Preferences

Document the home's preferences regarding age range, gender, and race of potential placements to facilitate appropriate matching.

While preferences are recorded, remember that these should be considered alongside agency policies regarding non-discrimination and the specific needs of children awaiting placement.

Service Type Selection

Indicate which service types the home is licensed for by checking the appropriate boxes from the available options.

This classification ensures that homes are only considered for placements that match their training, experience, and licensing qualifications.

Documenting Placement Comments



Placement Comments	
	/

Special Considerations

Document any special skills, training, or experiences that make the home suitable for certain types of placements, such as medical needs, behavioral challenges, or sibling groups.

Preference Clarifications

Use this space to provide context or additional details that expand on the demographic preferences indicated in the structured fields above.

Restrictions or Limitations

Note any limitations that might affect placement decisions, such as transportation constraints, work schedules, or existing family dynamics that need consideration.

Placement History Insights

Include relevant information about past placement successes or challenges that might inform future placement decisions for this home.

The Placement Comments field provides valuable qualitative information that complements the structured data in other fields. These insights help placement teams make more informed decisions that benefit both the children and the foster families, increasing the likelihood of stable, successful placements.

Recording Licensing Process Details



reviously Licensed?:	- Not Specified -	▼.			
ome Study Assigned:					
ome Study Received:		-			
		Prior	Licensina History		
		Prior	Licensing History		

Home Study Receipt

Track when the completed home study was received, allowing you to monitor the progress of the licensing workflow.



Maintaining accurate records of the licensing process timeline not only helps with internal tracking but also provides documentation that may be required for compliance with state regulations and accreditation standards. Regular reviews of this information can help identify bottlenecks in your licensing process.

Adding Comprehensive Licensing Comments



Licensing Comments————————————————————————————————————	
Licensing Comments	
	//

Document Significant Events

Record notable occurrences during the licensing process, such as unique circumstances, exceptions granted, or special conditions imposed on the license.

Track Communication History

Note important conversations with the family regarding their license, including discussions about renewal requirements, additional training needs, or clarification of licensing standards.

Highlight Areas for Follow-up

Identify any items that require future attention, such as pending documentation, scheduled inspections, or upcoming compliance checks that will need to be addressed.

The Licensing Comments section serves as a chronological record of the home's licensing journey, providing valuable context for anyone working with the family. This information helps maintain continuity when cases transfer between workers and ensures that institutional knowledge about the home is preserved over time.

Consider using a consistent format for your comments, including dates and the name of the person making the entry, to create a clear audit trail of licensing-related activities and decisions.

Key Takeaways & Best Practices





Regular Updates

Set calendar reminders to review and update licensing information quarterly, ensuring all data remains current and accurate.



Complete Documentation

Maintain comprehensive records in all sections to support placement decisions and demonstrate compliance with regulatory requirements.



Detailed Comments

Include specific, relevant details in comment fields to provide context that structured data fields cannot capture.



Team Communication

Use the licensing tab as a communication tool to share important information about homes with your placement team.

Effectively managing the Licensing Tab is crucial for maintaining accurate records and facilitating appropriate placements. If you encounter any questions not addressed in this guide, remember that support is available at **support@extendedreach.com** to assist you.

By implementing these best practices, you'll help ensure that your agency maintains high-quality data that supports better outcomes for the children and families you serve.

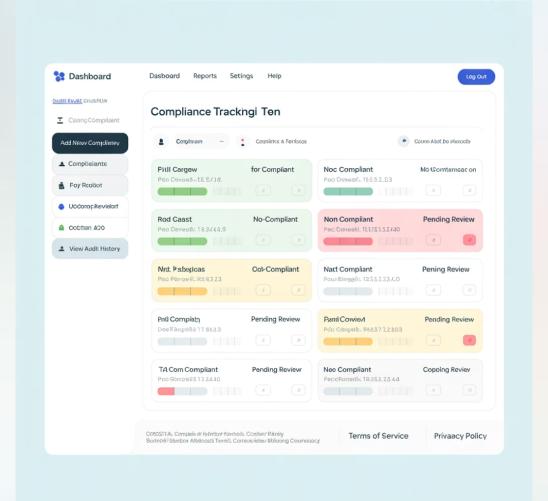
ExtendedReach Home Screen: Understanding the Compliance Tab

Welcome to this comprehensive guide on utilizing the Compliance Tab within ExtendedReach's Home Screen. This powerful feature provides case managers and administrators with a high-level overview of document compliance status across your organization.

The Compliance Tab is designed to help you quickly identify which activities or reports have been collected, which are missing, or which are approaching their due dates. Throughout this presentation, we'll explore the tab's functionality, navigation features, and best practices for maximizing its utility in your daily workflow.

by Emily Parks





Color Coding System: Visual Status Indicators



Green

Item has been completed OR item is due/expires more than 10 days from now



Red

Item is missing, past due, or has expired



Yellow

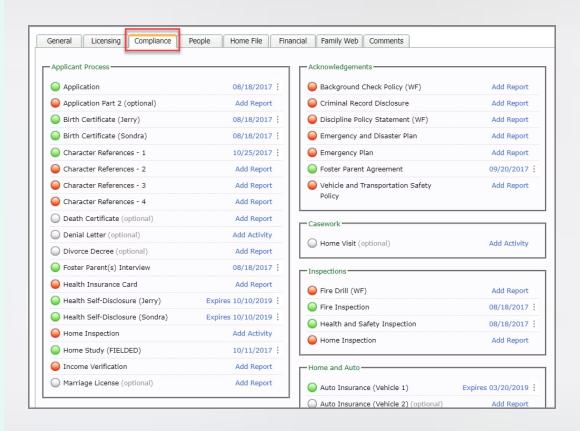
Item is currently drafted/in progress or expires within the next 10 days



White

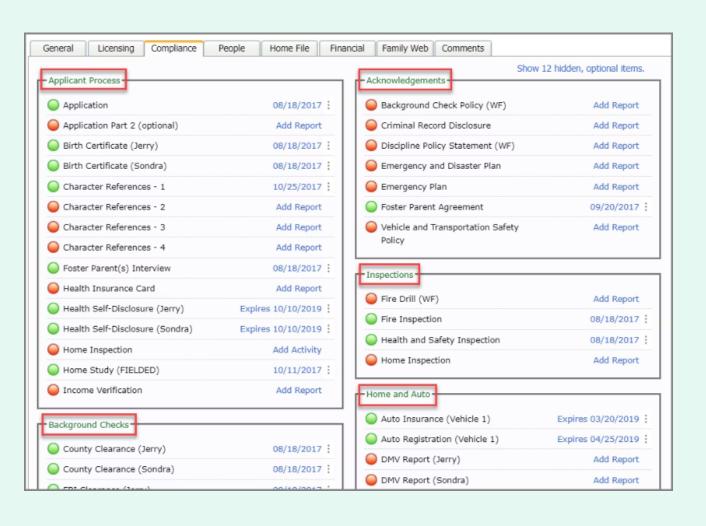
Optional items that appear only when "Show Hidden, Optional Items" is clicked

This intuitive color-coding system enables users to quickly prioritize their compliance tasks without needing to review each document individually. Remember that the Compliance Tab displays only the most recent version of each document; for historical versions, refer to the Home File Tab.



Organizational Structure: Category-Based Arrangement





Standard Categories

Items on the Compliance Tab are grouped into logical categories and listed alphabetically within each category. Typical examples include:

- Applicant Items
- Home Study
- Criminal Check
- References
- Training

Agency administrators can customize these categories through the Organization Preferences section under the Keywords tab, allowing you to align the Compliance Tab with your agency's specific terminology and workflow requirements.

This organized approach to compliance tracking helps users quickly locate specific document types and assess their status across multiple homes or applications, streamlining the monitoring process for case managers handling multiple cases simultaneously.

Accessing Documents: Navigation Options



Click Blue Hyperlinks

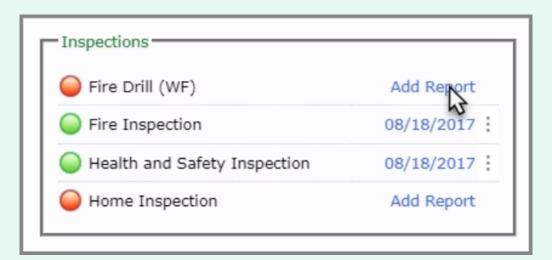
Access the most recent version of any activity or report by clicking on the blue hyperlink displayed next to the item name in the Compliance Tab.

Use Three-Dot Menu

View previous versions of documents by clicking the three dots to the right of each entry, which opens a contextual menu with additional options.

Add New Versions

For items without expiration dates or with repeating due dates, click the three dots and select "Add Report" to create a new version while preserving the original.



For documents with expiration or due dates, the system automatically links directly to a new version template when clicked, streamlining the renewal process. This intuitive navigation system ensures that users can quickly access, review, and update compliance documents as needed.

Managing Optional Items and Hidden Documents



Optional Items Display

By default, optional compliance items are hidden to reduce visual clutter. Click the "Show Hidden, Optional Items" button at the top of the Compliance Tab to reveal these items.

Status Tracking Activation

Once you add a document to an optional item, ExtendedReach begins tracking its compliance status using the standard color-coding system.

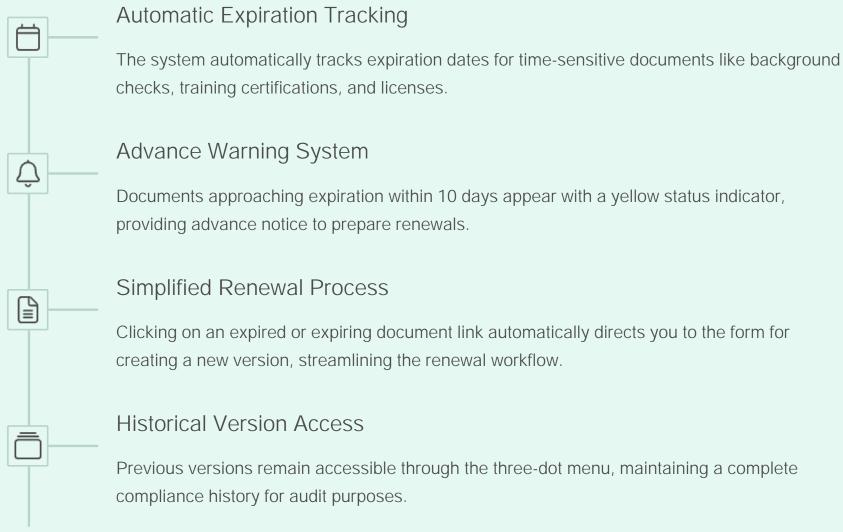
Customization Benefits

This approach allows agencies to maintain comprehensive compliance tracking while keeping the interface focused on required documents for day-to-day operations.



The ability to toggle the visibility of optional items provides flexibility for different user roles. Case managers focused on immediate compliance needs can work with a streamlined view, while quality assurance staff can access the complete compliance picture when conducting thorough reviews.

Handling Expiration Dates and Document Renewals



This automated expiration tracking system helps ensure your agency maintains continuous compliance by proactively identifying documents that require renewal, reducing the risk of overlooking critical compliance deadlines.



Accessing Previous Document Versions

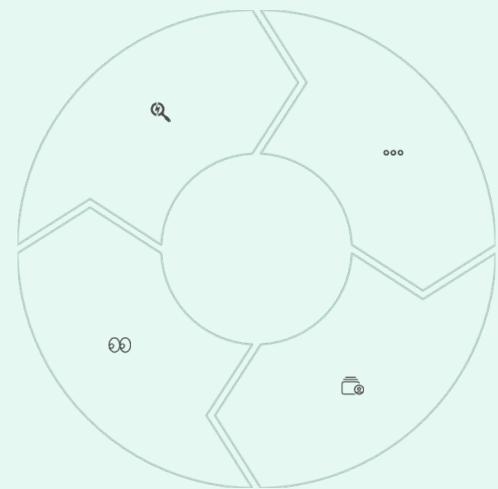


Locate Document

Find the document in the appropriate category section of the Compliance Tab

View Document

Access the historical document in read-only or editable mode depending on permissions



Open Menu

Click the three dots to the right of the document entry

Select Version

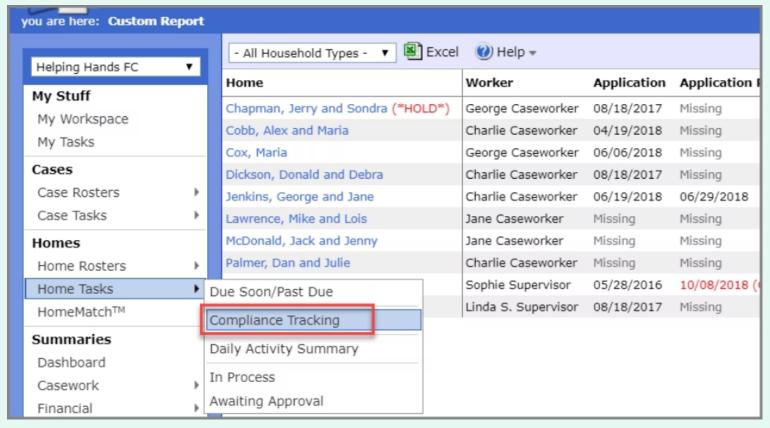
Choose from the list of previous versions in the dropdown menu



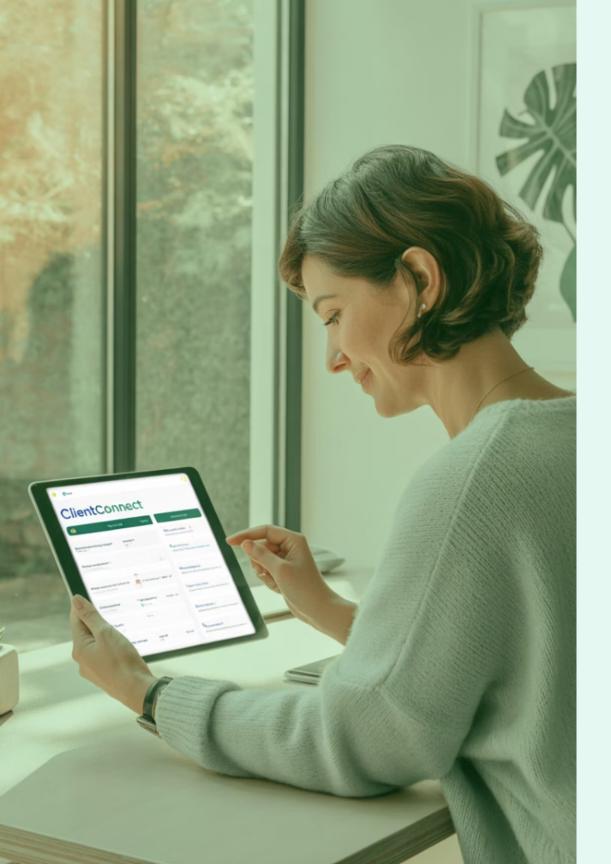
Agency-Wide Compliance Tracking and Reporting







This agency-wide view provides supervisors and administrators with a powerful tool for monitoring overall compliance health. The export functionality enables creation of custom reports for board meetings, accreditation reviews, or internal quality assurance processes. Regular review of these comprehensive reports can help identify systemic compliance issues before they become problematic.



Managing Relationships with the People Tab in extendedReach



Welcome to this comprehensive guide on using the People Tab within extendedReach's Home Screen. This powerful feature allows you to efficiently store and manage information about household members, non-household members, and additional resources used by homes in your agency.

Throughout this presentation, we'll explore the layout, functionality, and best practices for utilizing the People Tab. You'll learn how to add relationships, manage expiration dates and clearances, and leverage the Address Book integration to streamline your workflow.

Let's dive in and discover how to maximize this essential tool for your agency's relationship management needs.



by Emily Parks

Understanding the People Tab Layout







Centralized Information Storage

Agency-Wide Accessibility

The People Tab serves as a centralized repository for storing basic information about household members, emergency contacts, non-household members, and other individuals connected to a home.

All data stored within the People Tab is accessible to all authorized users within your agency, ensuring consistent information sharing and collaboration.



Multiple Addition Methods

The system offers two distinct methods for adding people: directly through the "Add Relationship" button or by copying individuals from the existing Address Book database.

The People Tab's intuitive layout makes it easy to quickly view, add, and manage all relationships associated with a home. This visual organization helps ensure that important connections are properly documented and maintained within your system.

Adding New Relationships





Click "Add Relationship"

Begin by locating and clicking the "Add Relationship" button at the top of the People Tab interface. This initiates the process of creating a new relationship entry within the system.

Select Relationship Type

Use the "Type" drop-down menu to specify whether the relationship is for a household member, non-household member, organization, respite home, or a borrowed bed. This selection determines available options in the next step.

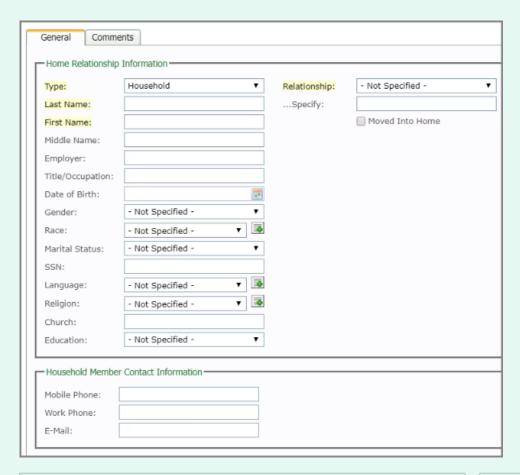
Define Specific Relationship

Based on your Type selection, choose the appropriate specific relationship from the "Relationship" field options. These relationship designations can be customized by agency administrators under Organization Preferences.

Adding relationships manually gives you complete control over how each person is categorized within your system. This process ensures that all connections to a home are properly documented with the correct relationship type, facilitating accurate reporting and compliance tracking.

Relationship Entry Details





Personal Information

Enter basic identifying details including name, date of birth, gender, ethnicity, and contact information to create a comprehensive profile for each individual in the system.

Relationship Classification

Properly categorize each person with the appropriate relationship type and specific relationship designation to ensure accurate reporting and compliance tracking throughout your agency.

Custom Fields

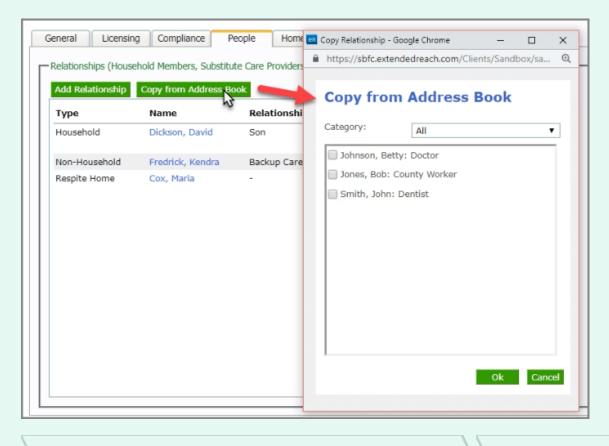
Depending on your agency's configuration, additional custom fields may be available to capture specialized information relevant to your specific programs and reporting requirements.

When adding a new relationship, be thorough in completing all available fields. The more comprehensive the information, the more valuable this record becomes for case management, reporting, and ensuring appropriate services for each individual connected to the home.

Remember that relationship types can be customized to match your agency's terminology and needs through the Organization Preferences settings, accessible to administrators.

Leveraging the Address Book Integration







Locate and select this button in the People Tab interface to access

your agency's shared contact database.

From the pop-up window, check the boxes next individuals or organizations you wish to add.

Click "Ok" to add the selected contacts to the People Tab, creating relationship entries automatically.

The Address Book integration is particularly valuable for adding professionals and service providers who interact with multiple homes across your agency. County workers, healthcare providers, educators, and other community resources can be added once to the Address Book and then quickly associated with any home as needed.

This approach ensures consistency in contact information and reduces duplicate data entry, improving overall system efficiency and data integrity.

Managing Expiration Dates and Clearances



Organization Preferences

Agency administrators can enable expiration date tracking within the People Tab through system configuration settings.

Notifications

Receive alerts when important clearances or certifications are approaching expiration dates.



Date Entry

Add relevant expiration dates for each relationship when this feature is enabled for your agency.

Compliance Activities

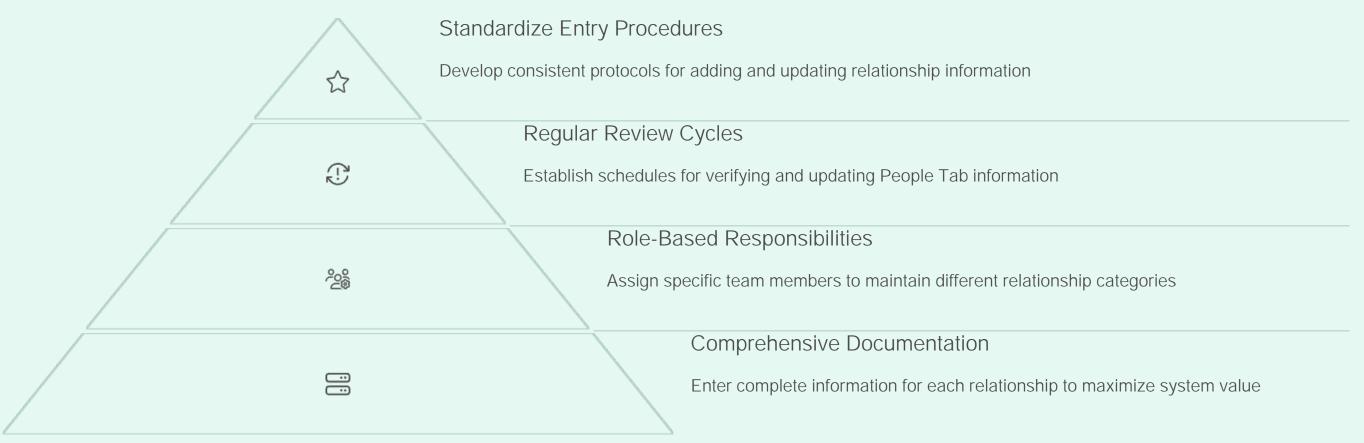
Create specific activities or reports in the Compliance tab to track expiration dates for individuals listed in the People tab.

Tracking expiration dates for clearances, certifications, and other time-sensitive documentation is a critical compliance function. When enabled, the People Tab can help maintain awareness of upcoming deadlines, ensuring your agency remains in compliance with regulatory requirements.

For comprehensive tracking beyond what's available in the People Tab, we recommend creating specific activities or reports in the Compliance tab to monitor these important dates for individuals connected to each home.

WHEFERING PINES CONSULTING

Best Practices for People Tab Management



Effective management of the People Tab requires intentional processes and clear responsibilities. By establishing standardized entry procedures and regular review cycles, you can ensure that relationship data remains accurate and up-to-date throughout your agency.

Consider creating internal guidelines that specify which team members are responsible for maintaining different types of relationships. This division of responsibility helps prevent data gaps and ensures comprehensive coverage of all important connections to each home.

Getting Additional Support





Email Support

Contact the extendedReach support team directly at support@extendedreach.com for personalized assistance with any People Tab questions.



Knowledge Base

Access comprehensive documentation and step-by-step guides in the extendedReach Help Center for self-service support.

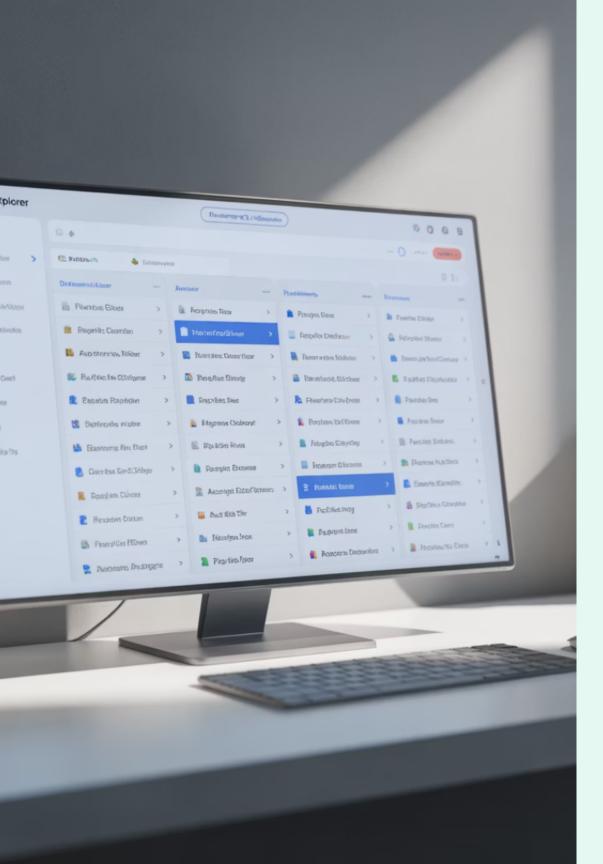


Admin Consultation

Reach out to your agency administrators for organization-specific guidance on People Tab configurations and customizations.

The People Tab is designed to be intuitive, but questions may arise as you explore its capabilities or encounter unique situations. Don't hesitate to reach out for support through any of these channels when needed.

Remember that your agency administrators can customize many aspects of the People Tab's functionality through Organization Preferences, so they're an excellent resource for questions about configuration options and agency-specific processes.



Navigating the Home Screen: Home File Tab Guide



Welcome to your comprehensive guide for navigating the Home File Tab in ExtendedReach. This powerful feature allows you to efficiently manage all your home-related documentation in one centralized location. Whether you're tracking activities, monitoring reports, or reviewing placement information, this guide will help you maximize your productivity.

We'll walk through the tab's layout, filtering options, and download capabilities to ensure you have complete mastery of this essential tool. If you encounter questions beyond the scope of this guide, remember that support is always available at support@extendedreach.com.

by Emily Parks





Understanding the Home File Tab Layout



Comprehensive Overview

The Home File tab provides a complete view of all documentation related to a specific home, including completed, due, and expiring items.



Powerful Filtering

Easily filter content to focus on specific activities, reports, placements, or revisions that matter most to your current task.



Historical Tracking

Access a complete history of all documentation, allowing you to track changes, monitor progress, and ensure compliance with requirements.

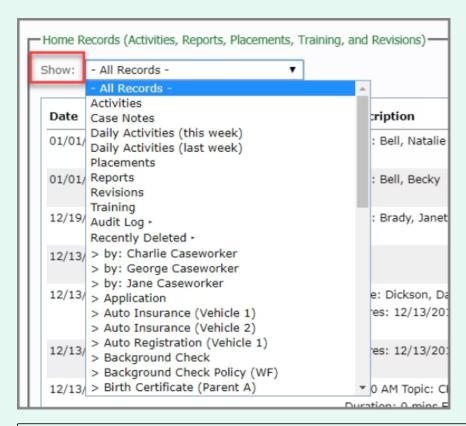


Convenient Downloads

Download all home documentation directly to your computer in an organized zip folder for offline access or reporting purposes.

Filtering Home Records with "Show" Options





Field Name	Description
Activities	List of all activities that are coming due or have been completed by the home
Case Notes	All of the case notes that have been compiled for the home
Daily Activities	View all daily activities completed or coming due
Placements	Placements that have been made
Reports	List of reports that are coming due or have been completed by the home
Revisions	List of any revisions that have been made

The "Show" dropdown menu allows you to customize your view by selecting specific record types to display. By default, all records pertaining to the home are shown, but you can narrow your focus to just what you need for your current task. This filtering capability saves time when working with homes that have extensive documentation.

Additional Record Types in the Show Menu



Training Records

Access a complete list of all training that has been completed by household members as well as upcoming required training. This helps ensure compliance with certification requirements and identifies any knowledge gaps that need to be addressed.

Training records include completion dates, certification expiration information, and links to associated documentation.

Audit Log

Review all recent activity in the home profile, including who has accessed it, edited it, or created any items. This comprehensive tracking provides accountability and helps maintain the integrity of your documentation.

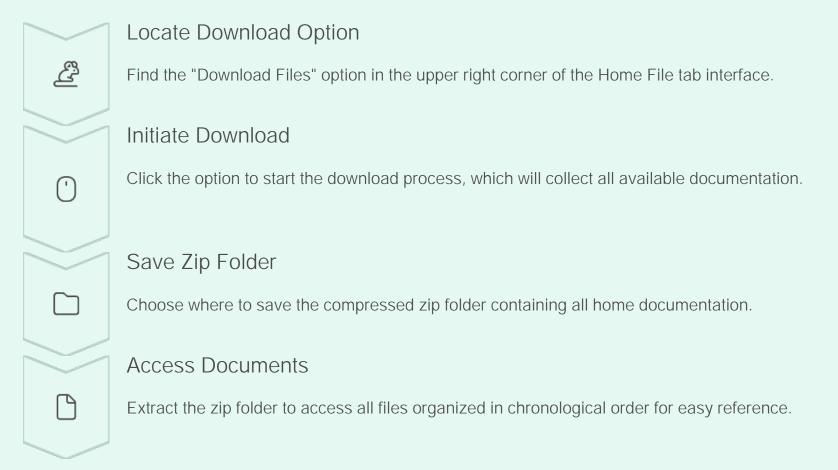
The audit log is particularly useful for quality assurance reviews and compliance verification, showing a complete history of all interactions.

Recently Deleted

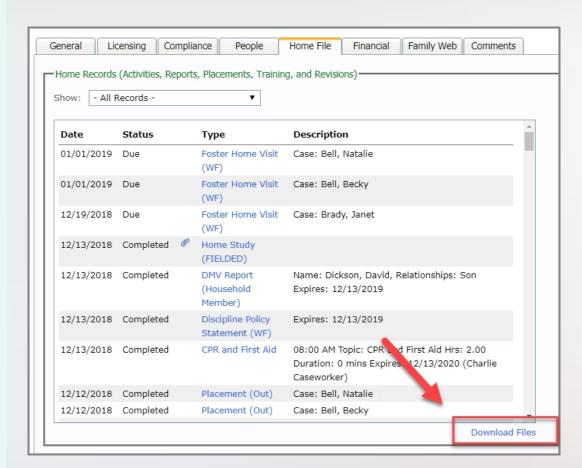
Access items that have been deleted from the home profile within the past 90 days. This safety feature allows you to recover accidentally deleted information and maintain complete records even after removal.

Recently deleted items can be restored to their original location with full metadata intact.

Downloading Files from the Home File Tab

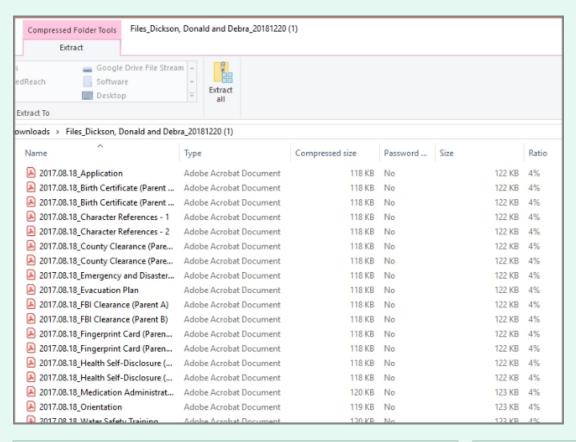


The download feature provides a convenient way to create local backups of all home documentation or prepare files for court submissions, audits, and other reporting requirements. All downloaded files maintain their original format and naming conventions for consistency.



Downloaded Files Organization





Chronological Order

All downloaded files are automatically organized in chronological order, making it easy to follow the history and progression of documentation over time.

This organization helps when preparing timeline reports or reviewing historical compliance.

Preserved Metadata

Each file retains its original metadata, including creation date, author information, and any special classifications or tags assigned in the system.

This ensures that downloaded documents maintain their context and relevance.

Original Formatting

Documents are downloaded in their native format, ensuring that all formatting, signatures, and embedded content remain intact and accessible.

This preserves the integrity of official documentation for legal or compliance purposes.

When you extract the downloaded zip folder, you'll find a well-organized file structure that mirrors the organization within ExtendedReach. This makes it simple to locate specific documents even when working offline or sharing information with stakeholders who don't have direct system access.

Best Practices for Home File Management



Regular Reviews

Schedule weekly reviews of due and expiring items to ensure timely completion of required documentation

Periodic Backups

Download complete home files quarterly for backup and offline reference purposes



Consistent Naming

Use standardized naming conventions for all uploaded documents to improve searchability

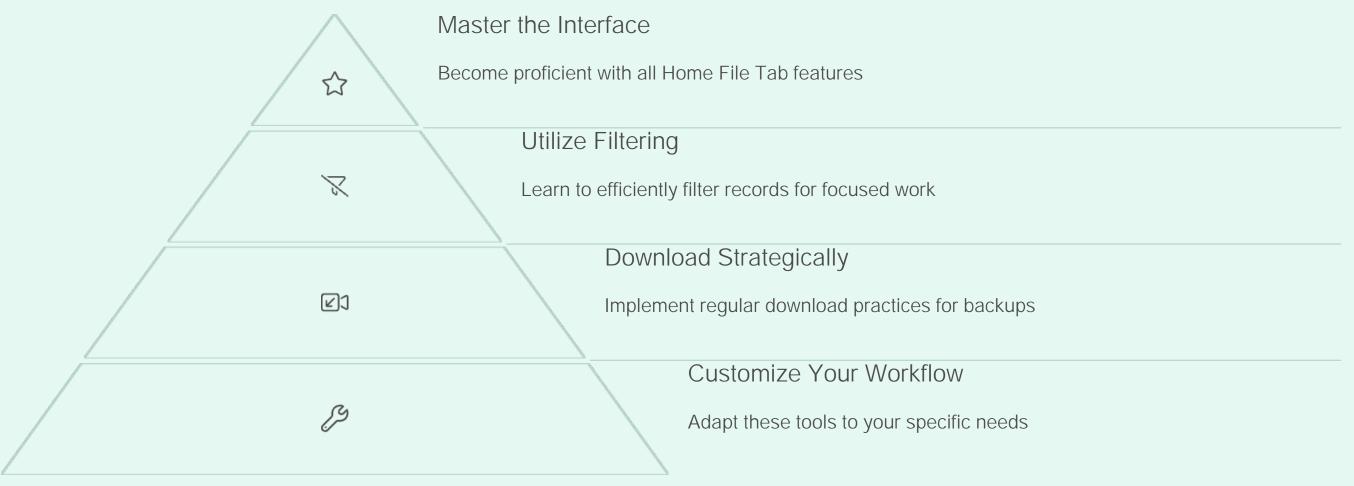
Targeted Filtering

Utilize the Show menu to focus on specific document types when completing related tasks

Implementing these best practices will help streamline your workflow and ensure that all home documentation remains organized and accessible. The Home File tab becomes significantly more powerful when used consistently with these strategies, reducing the time spent searching for information and minimizing the risk of missed deadlines.

Key Takeaways & Next Steps





Now that you understand the capabilities of the Home File Tab, we recommend exploring each feature hands-on to reinforce your learning. Start by reviewing your current homes and practicing the filtering options to find specific documentation. Try downloading files for one of your homes to familiarize yourself with the organization of the downloaded content.

For additional assistance or to suggest improvements to the Home File Tab functionality, contact ExtendedReach support at support@extendedreach.com.

Our team is committed to helping you maximize your efficiency with our software.





Understanding and Utilizing the Family Web Tab

The Family Web Tab is a powerful feature in ExtendedReach that enhances communication between agencies and foster families. This presentation will guide social workers and agency staff through the functionality, layout, and practical applications of the Family Web Tab to improve family engagement and streamline information sharing.

We'll explore how to navigate the tab's interface, post messages, monitor activity, invite families, and view the platform from the family's perspective. By the end of this presentation, you'll be equipped to leverage this tool effectively in your daily work with foster families.

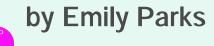


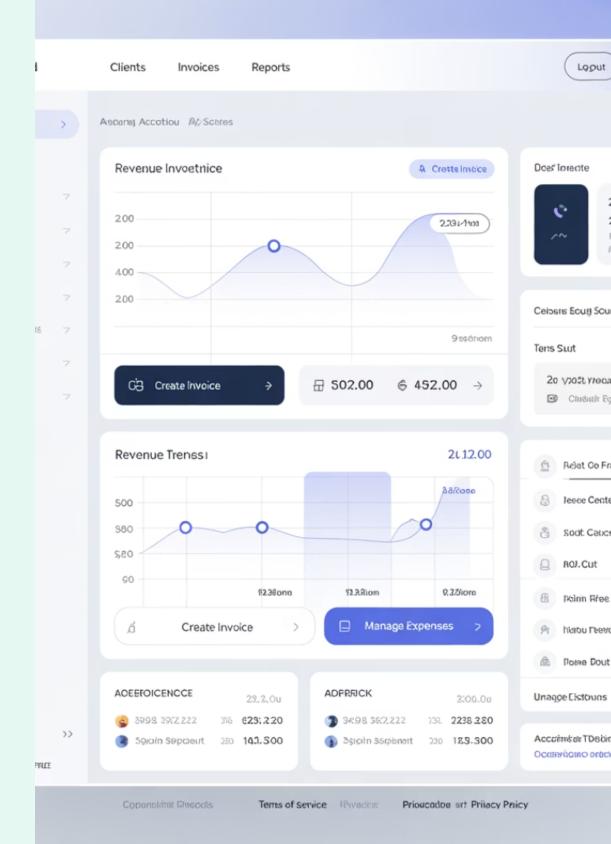
by Emily Parks

Enterprise Financials: Managing Home Reimbursements & Adjustments

Welcome to our comprehensive guide on using the Financial Tab in the Home Screen of extendedReach. This powerful feature, available exclusively with the Enterprise Financials add-on, allows you to efficiently manage reimbursements and adjustments for foster homes within your organization.

Throughout this presentation, we'll walk through each aspect of the Financial Tab, from navigation basics to creating and managing financial transactions. By the end, you'll have a solid understanding of how to leverage these tools to streamline your financial management processes.





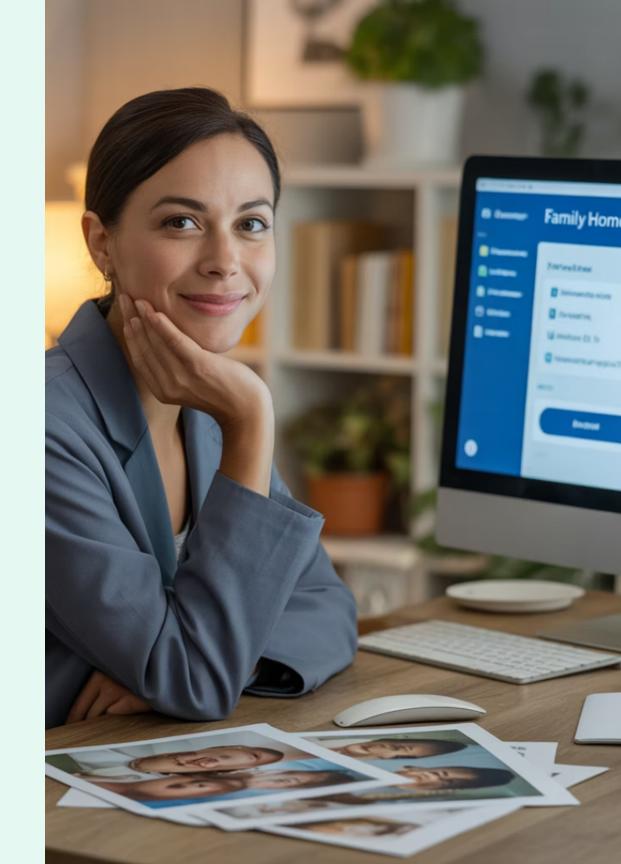
Comprehensive Guide to Tracking Adoptive Homes in extendedReach

Welcome to this comprehensive training on managing adoptive homes within the extendedReach platform. This presentation will guide agency staff through the complete process of tracking adoptive homes—from initial application to closing. You'll learn efficient navigation techniques, key features, and best practices that streamline your workflow.

We'll explore the system's capabilities to help you maintain accurate records, monitor applicant progress, and ensure compliance with adoption requirements. Let's begin with understanding how to properly establish and track adoptive homes in the system.

by Emily Parks





Setting Up An Adoptive Home Record



Initial Setup Process

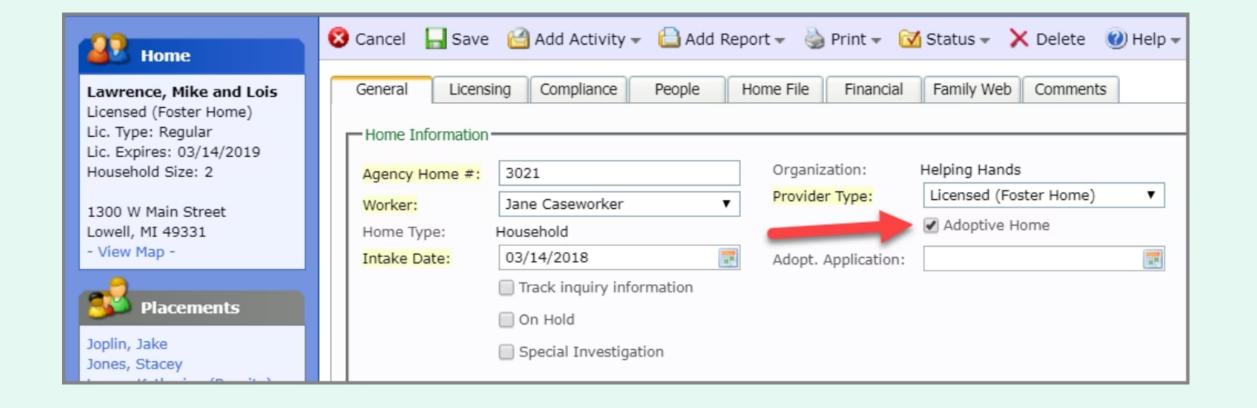
Creating a new adoptive home record requires specific actions to ensure proper categorization in the system. First, navigate to the home creation screen where you'll find various home type options.

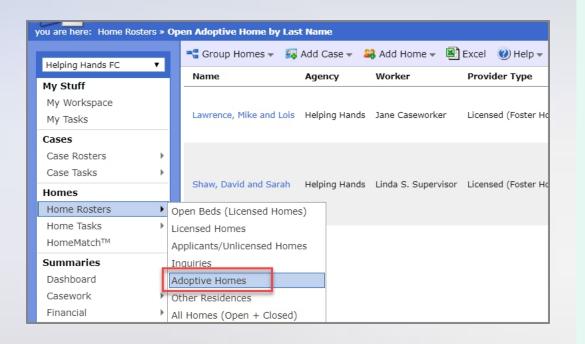
The key step is checking the "Adoptive Home" checkbox, which activates adoption-specific fields and tracking capabilities. This designation ensures the home appears in adoptive home reports and dashboards.

Date Documentation

After designating the home type, you must select the Adoption Application date using the calendar icon located on the right side of the input field. This timestamp establishes when the formal application process began.

The application date serves as a reference point for timeline tracking, deadline management, and compliance reporting. Accurate dating is essential for regulatory requirements.





Accessing Home Rosters





Navigate to Home Rosters

Begin by locating and clicking on the "Home Rosters" option in the main navigation menu. This section contains all home management functions.



Select Adoptive Homes

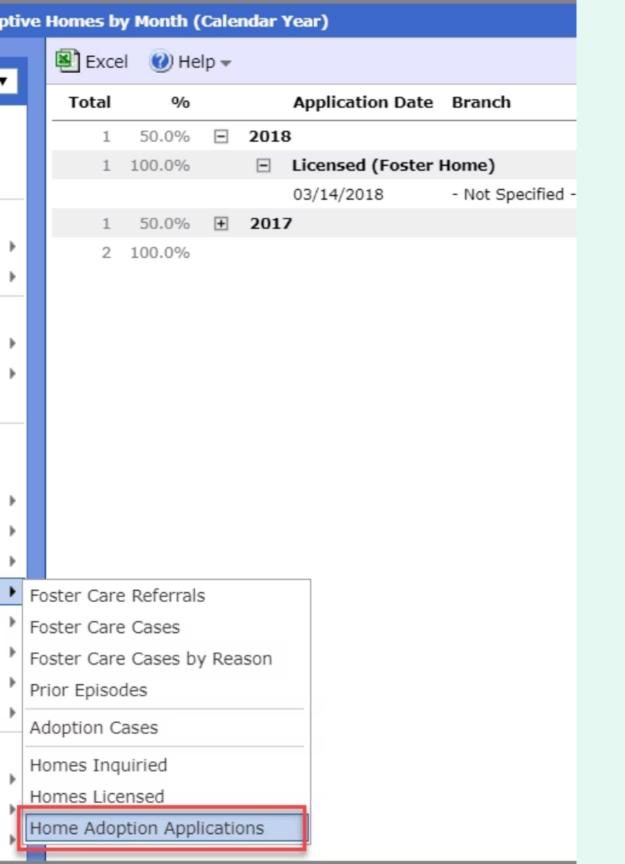
From the dropdown menu, choose "Adoptive Homes" to filter the roster specifically for adoption-designated households.



Review Complete Roster

The system displays all currently open adoptive homes in your agency, allowing for comprehensive oversight and management.

The Home Roster view provides a centralized location to monitor all active adoptive homes. This interface allows staff to quickly assess status, capacity, and key metrics across your entire adoptive home portfolio.



Managing Home Adoption Applications



Access the Intake Menu

Begin by clicking on the "Intake" option in the main navigation menu. This section handles all incoming applications and referrals.

Select Home Adoption Applications

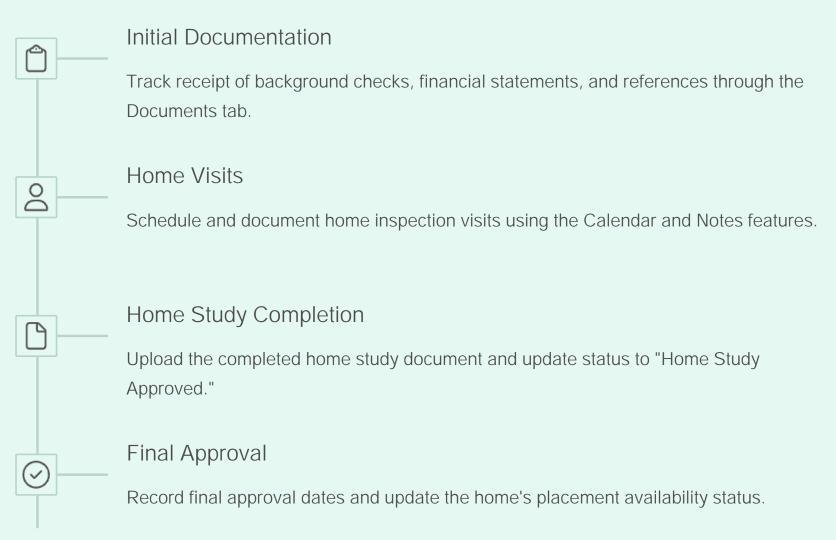
From the dropdown menu, choose "Home Adoption Applications" to view all homes that have submitted formal adoption applications.

Review Application Queue

The resulting screen displays all pending applications with status indicators and next action requirements.

This view provides a comprehensive overview of all homes in various stages of the application process. Social workers can efficiently track which applications need attention, identify bottlenecks, and ensure timely processing of all adoption applicants.

Tracking the Home Study Process



The home study process requires meticulous documentation and milestone tracking. ExtendedReach provides integrated tools to ensure each step is properly recorded, creating a complete audit trail from initial application through final approval.



Matching Children with Adoptive Homes

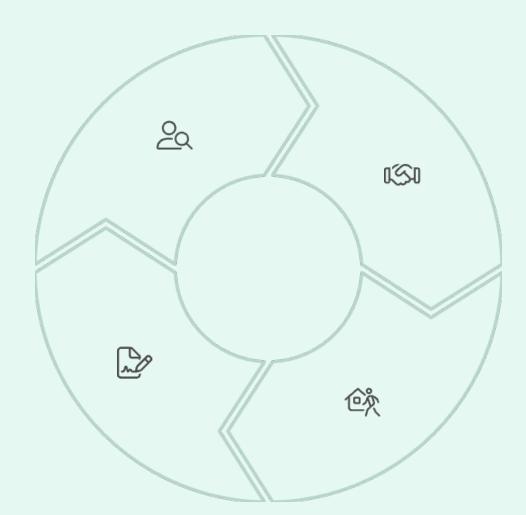


Identify Potential Matches

Use the matching tool to find compatible children based on home preferences and capacity.

Finalization

Document court dates, legal processes, and adoption finalization details.



Initiate Introductions

Document initial meetings, visits, and interactions between child and prospective family.

Placement Period

Record the placement and track required supervisory visits during the pre-adoption period.

The matching process represents the heart of adoption work. ExtendedReach provides tools to identify potential matches based on the specific needs of the child and the capabilities of the adoptive home. The system maintains detailed records of each step in the matching and placement process.

Closing an Adoptive Home





Navigate to Home Status

Locate the home record you wish to close and click on the "Status" dropdown menu in the home profile.



Select Discharge Option

Choose "Discharge" from the dropdown menu to initiate the closure process for the adoptive home.



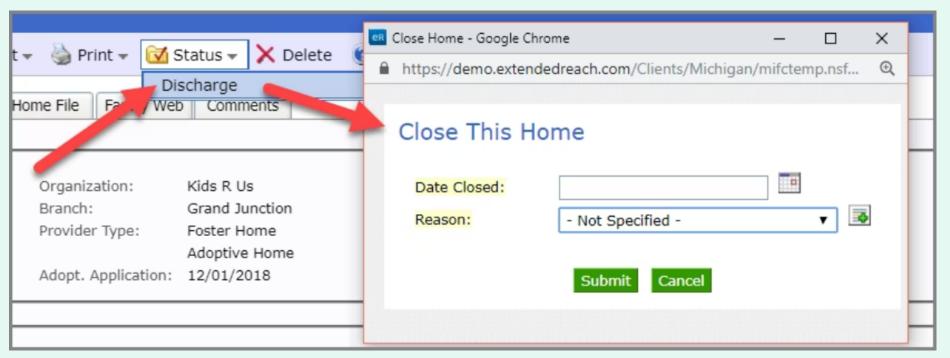
Complete Required Fields

In the pop-up window, enter all mandatory information including discharge reason, date, and any additional notes about the closure.



Submit and Confirm

Click "Submit" to finalize the home closure and update its status in the system database.



The process for closing adoptive homes mirrors that of foster homes. Note that your organization can customize discharge reasons through Organization Preferences, allowing for adoption-specific closure categories that better reflect your agency's workflow and reporting needs.

Best Practices & System Optimization



Regular Data Audits

Conduct monthly reviews of adoptive home records to ensure completeness and accuracy. Look for missing documentation, outdated information, or incomplete status updates that might affect reporting or compliance.

Custom Report Creation

Develop specialized reports for adoptive homes to track key metrics like time-to-placement, successful matches, or homes nearing license expiration. Use the Reports module to save and schedule these reports for regular distribution.

Integration with Other Modules

Maximize efficiency by utilizing connections between the Adoptive Homes module and other system components like Case Management, Billing, and Document Management for a comprehensive workflow.

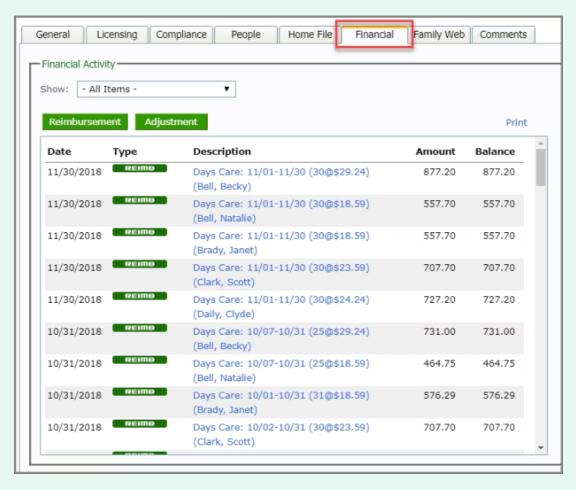
User Training

Ensure all staff receive thorough training on adoptive home tracking features. Consider designating super-users who can provide ongoing support and training to new staff members.

Implementing these best practices will enhance your agency's ability to efficiently manage the adoption process. Remember that support is always available at **support@extendedreach.com** for any questions not covered in this presentation. Regular system usage reviews and staff training sessions will ensure your team maximizes the benefits of extendedReach's adoptive home tracking capabilities.

Understanding the Financial Tab Layout





Overview

The Financial Tab provides a comprehensive view of all financial activities related to a home. You'll find this tab on the Home Screen when you have the Enterprise Financials add-on activated for your organization.

This centralized view helps administrators track all financial obligations and corrections in one convenient location, eliminating the need to navigate between multiple screens or reports.

Filtering Options

Use the "Show" dropdown menu to filter the financial activity display according to your needs. By default, all financial items are shown, but you can select specific categories:

- Select "Reimbursements" to view only payments due to homes
- Select "Adjustments" to view only corrections to previously recorded amounts

General	Licensing Co	ompliance People Home File Financia	al Family Web	Comments		
Financial Activity Show: □ - All Items - ▼						
Reimbursement Adjustment Print						
Reimburse	ement Adju	stment		Print		
Reimburse	Type	Description	Amount	Print Balance		

Creating New Reimbursements





Access the Reimbursement Function

From the Financial Tab, click the "Reimbursement" button to create a new reimbursement record. This initiates the reimbursement creation process.



Complete Required Information

Fill out all necessary fields including reimbursement date, type, case association, and funding organization. Be thorough to ensure proper financial tracking.



Save the Reimbursement

After verifying all information is correct, click the "Save" button to record the reimbursement in the system and make it available for processing.

While most commonly used for Days Care reimbursements, this feature can accommodate various expense types that homes may incur, providing flexibility in your financial management approach.

General Billing	Comments					
Reimbursement Information						
Reimbursement Date:	12/20/2018	Status:	New			
Type:	- Not Specified - ▼					
Case:	[3]					
Program:	- Not Specified -	Funding Org:	- Not Specified - ▼			
Amount:			Specify quantity and rate			
Memo:						

Reimbursement Form Fields Explained

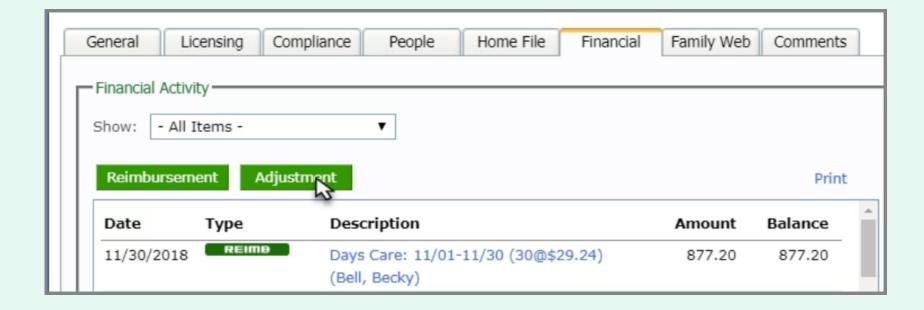


Field Name	Description
Daimsley was a metal Data	
Reimbursement Date	The date when the reimbursement was or will
	be issued
Туре	Category of reimbursement (select from
	dropdown options)
Case	The specific case associated with this expense
Program	Relevant program within your organization
Memo	Additional notes or context for the
	reimbursement
Status	Current state of the reimbursement (defaults to
	"New")
On Hold/Do Not Post	Special handling flags for billing purposes

Understanding each field's purpose ensures accurate record-keeping and proper financial tracking. Take special note of the "On Hold" and "Do Not Post" checkboxes, as these affect how items appear in the Billing tab and whether they'll be included in financial processing.

Creating Adjustments





Access the Adjustment Function

From the Financial Tab, click on the "Adjustment" button to initiate the adjustment creation process. This opens the adjustment form where you can correct previously recorded financial information.

Specify Adjustment Details

Determine whether you're adjusting a reimbursement or days care entry. Select the adjustment type (increase or decrease) and locate the specific item being corrected using the "Apply To" field.

Document and Save

Enter the adjustment amount, provide a detailed explanation in the memo field to document the reason for the change, and click "Save" to record the adjustment in the system.

Adjustments are primarily used to correct Days Care reimbursements when the original amounts were incorrect, but they can also be applied to other expense types. Proper documentation in the memo field is essential for audit purposes and financial transparency.

Adjustment Form Fields Explained

Primary Information

- Adjustment Date: When the correction is being made
- Adjust: Choose between reimbursement or days care
- Type: Specify increase or decrease to the original amount

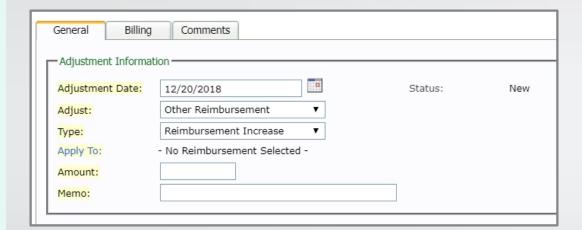
Targeting

- Apply To: Select the specific reimbursement being adjusted
- Amount: Enter the adjustment value (not the new total)

Documentation

- Memo: Record detailed notes explaining the reason for adjustment
- Status: System-assigned state (defaults to "New")

When creating adjustments, remember that the amount field represents the change value, not the new total. For example, if you're decreasing a \$100 reimbursement by \$25, enter "25" as the amount with the "Decrease" type selected. The system will calculate the new total of \$75 automatically.



Best Practices for Financial Management



Regular Reconciliation



Detailed Documentation



Strategic Filtering

Schedule weekly or monthly reviews of the Financial Tab to ensure all reimbursements and adjustments are processed promptly. This helps prevent backlogs and maintains accurate financial records.

Always include comprehensive notes in the memo fields when creating financial entries.

These notes provide important context for other users and are invaluable during audits or

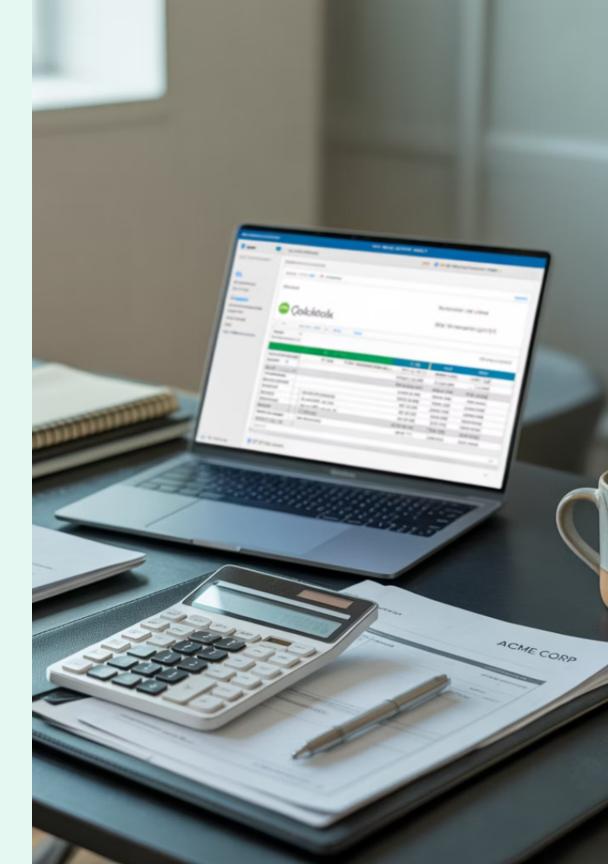
financial reviews.

Use the "Show" dropdown effectively to focus on specific transaction types when reviewing financial data. This targeted approach improves efficiency when handling large volumes of transactions.



Access Control

Limit financial management permissions to appropriate staff members. This maintains financial data integrity and ensures only authorized personnel can create or modify financial records.



Getting Additional Support



Search Related Articles

Browse the knowledge base for additional financial management articles at the bottom of each help page under "Related Articles"

Request Training

Arrange specialized training sessions for your team to maximize your use of the Financial Tab features



Contact Support Team

Email support@extendedreach.com with specific questions or issues that aren't addressed in the documentation

Explore Enterprise Financials

For organizations without the Enterprise Financials add-on, contact sales@extendedreach.com to request information or schedule a demo

extendedReach is committed to ensuring you get the most out of the Enterprise Financials add-on. Our support team is ready to assist with implementation questions, troubleshooting, or advanced usage scenarios. Don't hesitate to reach out when you need guidance on optimizing your financial workflows.

Family Web Tab Overview



Accessible via Home Screen

Located in the household section for specified provider types



Customizable Access

Control which provider types can access the Family Web through Organization Preferences



Family Communication Hub

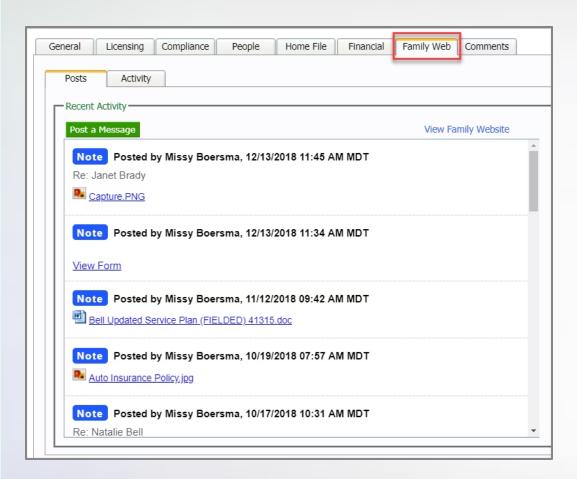
Centralized location for all family-related communications and updates



Technical Support

Contact support@extendedreach.com for assistance with enabling or troubleshooting

The Family Web Tab serves as a central communication platform between your agency and foster families. If you don't see this feature, it may need to be enabled for your agency. The tab's layout is designed to be intuitive, providing quick access to posts, activities, and the family website view.



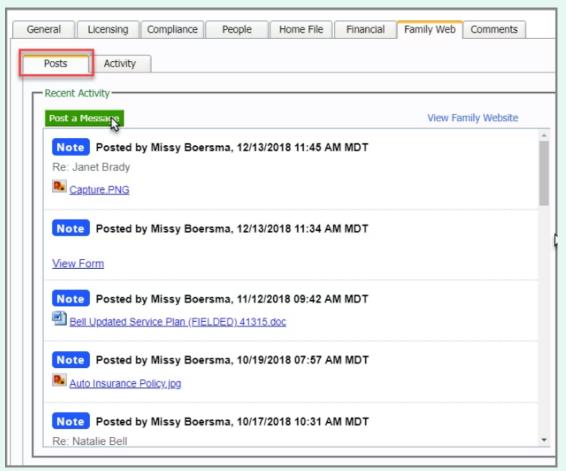
Understanding the Posts Tab



Comprehensive Activity View

The Posts tab displays all communications and activities that occur within the Family Web environment, creating a chronological record of interactions between agency staff and foster families.

This transparency ensures that all team members can stay informed about family communications, reducing the risk of missed information or duplicated efforts.



Messaging Capability

Initiate direct communication with foster families by clicking the "Post a Message" button. This feature allows you to share updates, reminders, or important information that will be immediately visible to the family when they log in.

The Posts tab is your window into all Family Web communications. Here you can view the complete history of interactions and send new messages to families. This centralized communication helps maintain consistent information flow and strengthens the relationship between your agency and foster families.

Sending Messages to Families



Navigate to Posts Tab

From the Family Web Tab in the household's Home Screen, select the Posts tab to view all current communications.

Click "Post a Message"

This button opens the message creation interface where you can compose your communication to the family.

Compose and Send

Write your message, review for clarity and professionalism, then send it to make it immediately available to the family.

Track Engagement

Monitor when families view your messages to ensure important information has been received.

Effective communication with foster families is essential for successful case management. The messaging feature allows you to maintain regular contact, share timely updates, and address concerns promptly. Remember that all messages become part of the permanent record, so maintain professional communication standards at all times.

Managing Family Web Activity

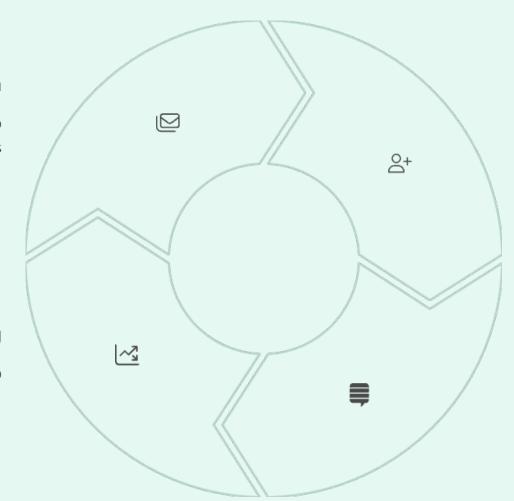


Send Invitation

Initiate family access by sending email invitations with setup instructions

Activity Monitoring

Track engagement and participation through the Activity tab

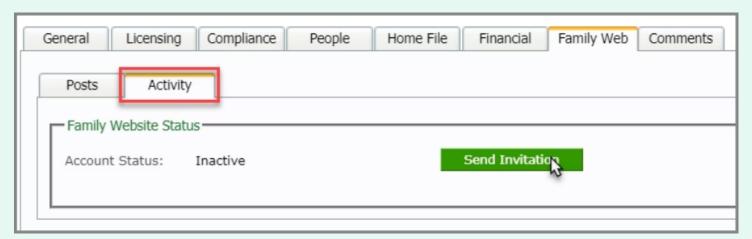


Family Registration

Families create accounts and access their personalized web portal

Ongoing Communication

Regular information sharing between agency and family



The Activity tab is where you'll manage family access to the web portal. The "Send Invitation" feature generates an email with instructions for setting up their account. This tab also allows you to track

Inviting Families to the Web Portal



Preparation Steps

- Verify family email addresses are current in the system
- Ensure the family's provider type has been granted access
- Consider preparing families with a phone call before sending the invitation

Invitation Process

- Navigate to the Activity tab in the Family Web section
- Click the "Send Invitation" button to generate the email
- System sends detailed instructions to the family's email address

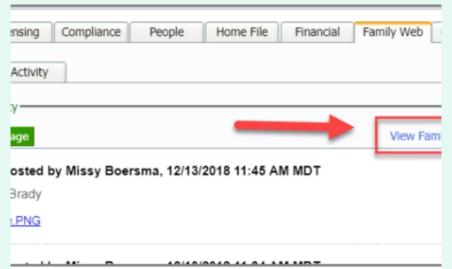
Follow-Up Actions

- Check the Activity tab to confirm if invitations have been opened
- Contact families who haven't registered after a week
- Offer technical assistance to families experiencing difficulties

Properly introducing families to the Family Web portal is crucial for successful adoption. Take time to explain the benefits of using the platform, such as improved communication, easier document sharing, and faster response times. Consider creating simple handouts with visual instructions to supplement the email invitation.

Viewing the Family Perspective





Family Dashboard View

Access the family's perspective by clicking "View Family Website" in the Posts tab. This allows you to see exactly what the family sees when they log in, helping you provide better guidance and support.



Family User Experience

Understanding the family's user interface helps you anticipate questions and troubleshoot issues more effectively. The family view includes notifications, messages, document access, and other features designed for their specific needs.



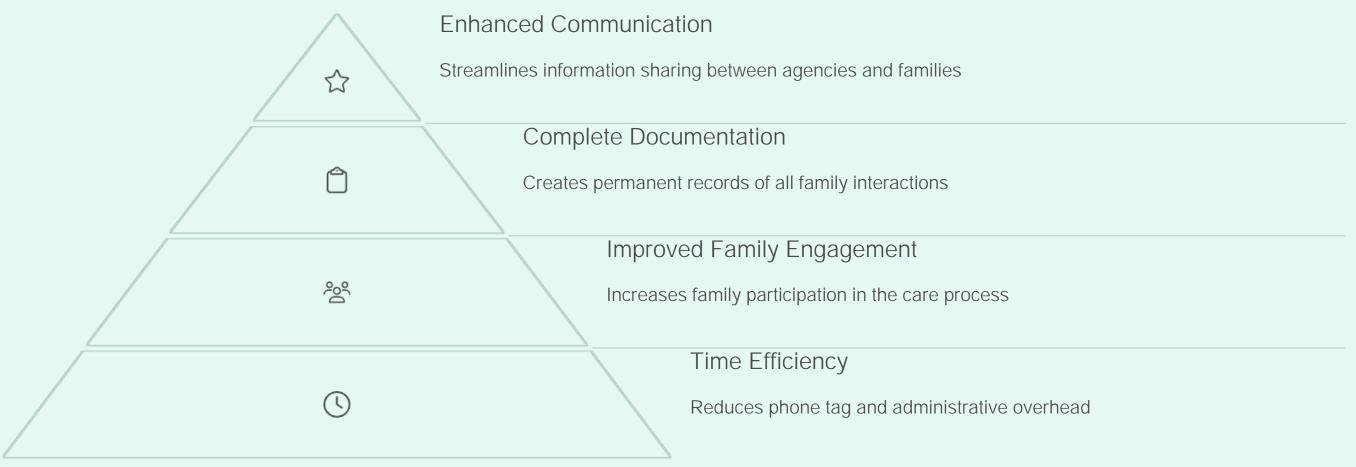
Training Opportunities

Use the family view during orientation sessions to demonstrate the platform's functionality. This hands-on approach increases comfort levels and encourages consistent usage of the communication tool.

Experiencing the Family Web from the family's perspective is invaluable for providing effective support. This view allows you to identify potential confusion points, verify that information displays correctly, and better understand the family's interaction with your agency. Consider scheduling virtual training sessions to walk new families through the interface.

Key Takeaways and Next Steps





The Family Web Tab transforms how your agency connects with foster families, creating a more responsive and transparent relationship. As you implement this tool, start by identifying several families who would benefit most from this communication channel, then gradually expand adoption agency-wide.

Remember that consistent usage by staff is key to successful implementation. Consider designating "Family Web champions" within your team to help colleagues integrate this tool into their daily workflows. For additional support, contact ExtendedReach at support@extendedreach.com.

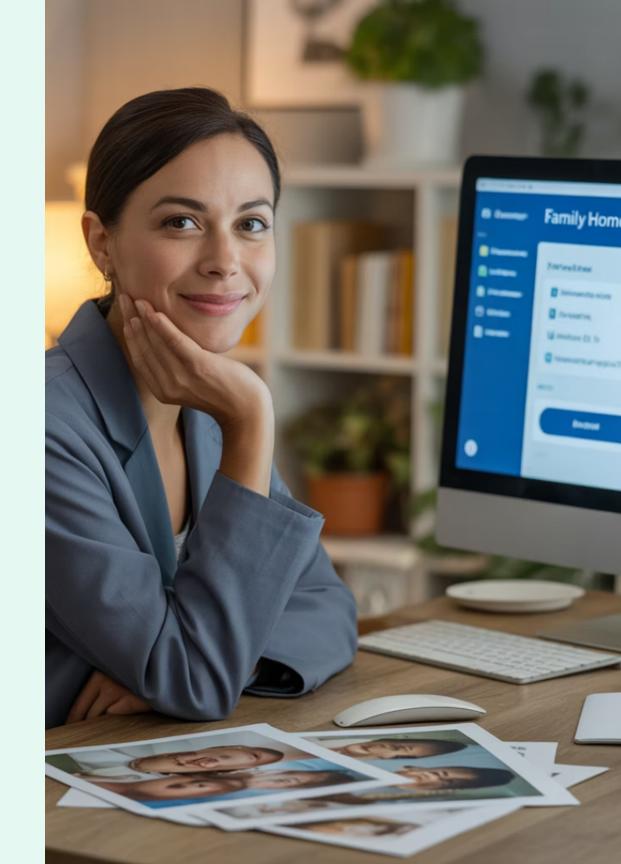
Comprehensive Guide to Tracking Adoptive Homes in extendedReach

Welcome to this comprehensive training on managing adoptive homes within the extendedReach platform. This presentation will guide agency staff through the complete process of tracking adoptive homes—from initial application to closing. You'll learn efficient navigation techniques, key features, and best practices that streamline your workflow.

We'll explore the system's capabilities to help you maintain accurate records, monitor applicant progress, and ensure compliance with adoption requirements. Let's begin with understanding how to properly establish and track adoptive homes in the system.

by Emily Parks





Setting Up An Adoptive Home Record



Initial Setup Process

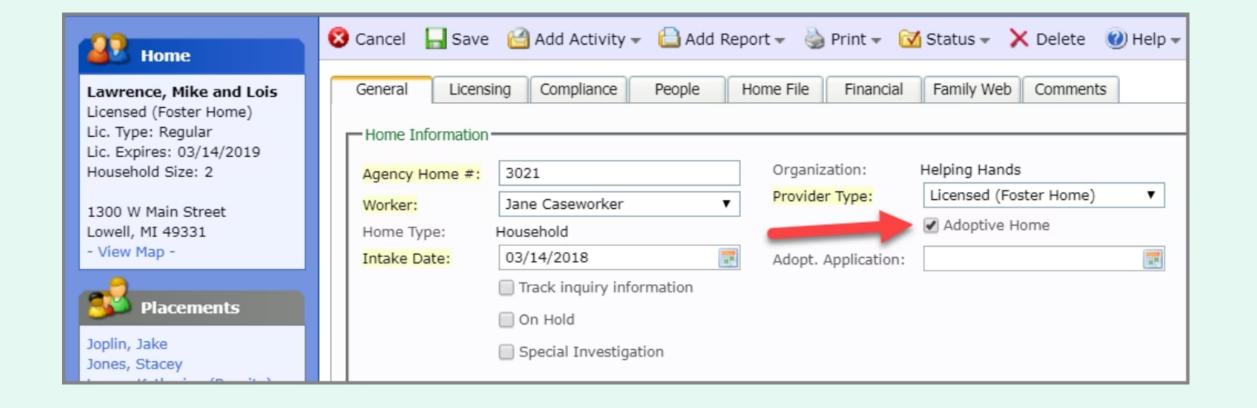
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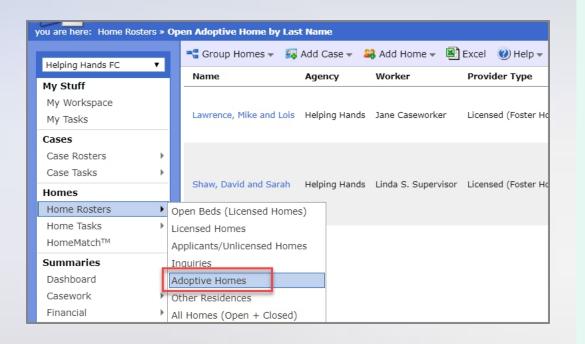
The key step is checking the "Adoptive Home" checkbox, which activates adoption-specific fields and tracking capabilities. This designation ensures the home appears in adoptive home reports and dashboards.

Date Documentation

After designating the home type, you must select the Adoption Application date using the calendar icon located on the right side of the input field. This timestamp establishes when the formal application process began.

The application date serves as a reference point for timeline tracking, deadline management, and compliance reporting. Accurate dating is essential for regulatory requirements.





Accessing Home Rosters





Navigate to Home Rosters

Begin by locating and clicking on the "Home Rosters" option in the main navigation menu. This section contains all home management functions.



Select Adoptive Homes

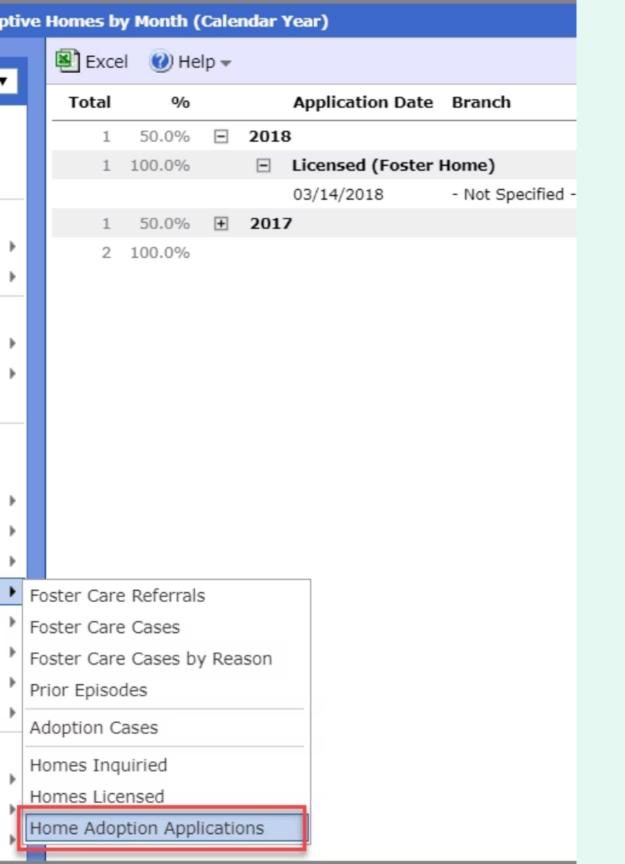
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The system displays all currently open adoptive homes in your agency, allowing for comprehensive oversight and management.

The Home Roster view provides a centralized location to monitor all active adoptive homes. This interface allows staff to quickly assess status, capacity, and key metrics across your entire adoptive home portfolio.



Managing Home Adoption Applications



Access the Intake Menu

Begin by clicking on the "Intake" option in the main navigation menu. This section handles all incoming applications and referrals.

Select Home Adoption Applications

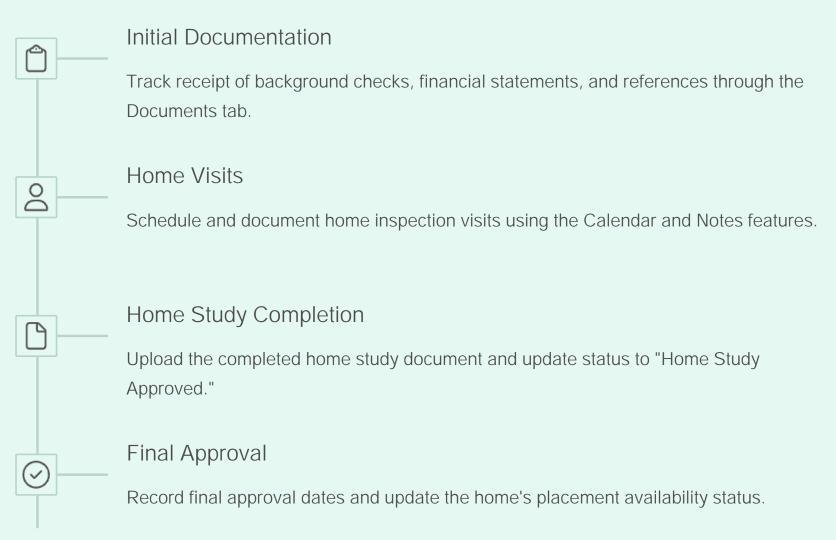
From the dropdown menu, choose "Home Adoption Applications" to view all homes that have submitted formal adoption applications.

Review Application Queue

The resulting screen displays all pending applications with status indicators and next action requirements.

This view provides a comprehensive overview of all homes in various stages of the application process. Social workers can efficiently track which applications need attention, identify bottlenecks, and ensure timely processing of all adoption applicants.

Tracking the Home Study Process



The home study process requires meticulous documentation and milestone tracking. ExtendedReach provides integrated tools to ensure each step is properly recorded, creating a complete audit trail from initial application through final approval.



Matching Children with Adoptive Homes

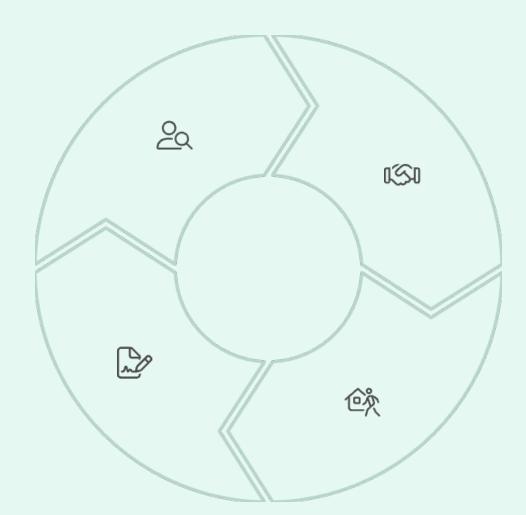


Identify Potential Matches

Use the matching tool to find compatible children based on home preferences and capacity.

Finalization

Document court dates, legal processes, and adoption finalization details.



Initiate Introductions

Document initial meetings, visits, and interactions between child and prospective family.

Placement Period

Record the placement and track required supervisory visits during the pre-adoption period.

The matching process represents the heart of adoption work. ExtendedReach provides tools to identify potential matches based on the specific needs of the child and the capabilities of the adoptive home. The system maintains detailed records of each step in the matching and placement process.

Closing an Adoptive Home





Navigate to Home Status

Locate the home record you wish to close and click on the "Status" dropdown menu in the home profile.



Select Discharge Option

Choose "Discharge" from the dropdown menu to initiate the closure process for the adoptive home.



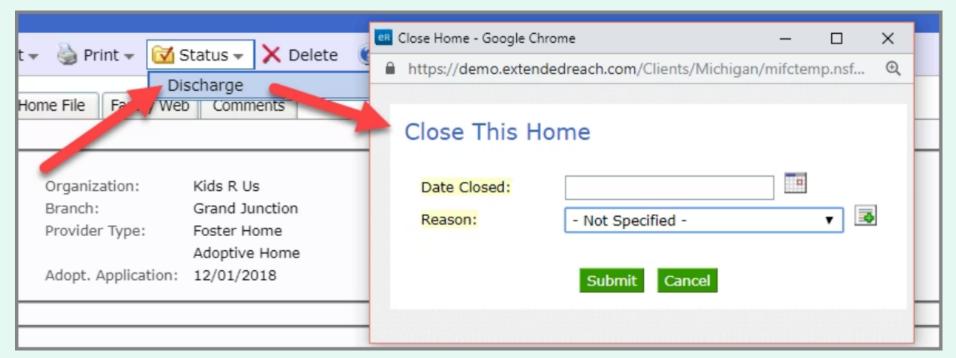
Complete Required Fields

In the pop-up window, enter all mandatory information including discharge reason, date, and any additional notes about the closure.



Submit and Confirm

Click "Submit" to finalize the home closure and update its status in the system database.



The process for closing adoptive homes mirrors that of foster homes. Note that your organization can customize discharge reasons through Organization Preferences, allowing for adoption-specific closure categories that better reflect your agency's workflow and reporting needs.

Best Practices & System Optimization



Regular Data Audits

Conduct monthly reviews of adoptive home records to ensure completeness and accuracy. Look for missing documentation, outdated information, or incomplete status updates that might affect reporting or compliance.

Custom Report Creation

Develop specialized reports for adoptive homes to track key metrics like time-to-placement, successful matches, or homes nearing license expiration. Use the Reports module to save and schedule these reports for regular distribution.

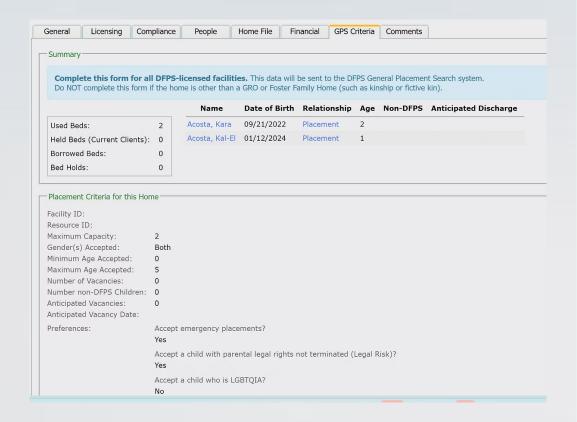
Integration with Other Modules

Maximize efficiency by utilizing connections between the Adoptive Homes module and other system components like Case Management, Billing, and Document Management for a comprehensive workflow.

User Training

Ensure all staff receive thorough training on adoptive home tracking features. Consider designating super-users who can provide ongoing support and training to new staff members.

Implementing these best practices will enhance your agency's ability to efficiently manage the adoption process. Remember that support is always available at **support@extendedreach.com** for any questions not covered in this presentation. Regular system usage reviews and staff training sessions will ensure your team maximizes the benefits of extendedReach's adoptive home tracking capabilities.



Enabling Texas GPS Integration for Foster Care Data Transfer



Welcome to this comprehensive guide on enabling the Texas GPS data collection integration in extendedReach. This powerful feature allows Texas child welfare providers to seamlessly transfer placement criteria and vacancies to the Texas Department of Family and Protective Services General Placement Search (GPS) System.

Through this presentation, you'll learn the complete process from enabling the integration to configuring contacts and managing field requirements. Let's ensure your organization meets state requirements while streamlining your data submission process.





Integration Overview and Benefits





Real-time Data Transfer

All data entered into extendedReach is automatically sent to the GPS system as it's saved, eliminating manual reporting.



Compliance Assurance

Meet Texas Department of Family and Protective Services requirements for placement criteria and vacancy submissions.



Streamlined Workflow

Reduce administrative burden by entering data once in your familiar extendedReach environment.

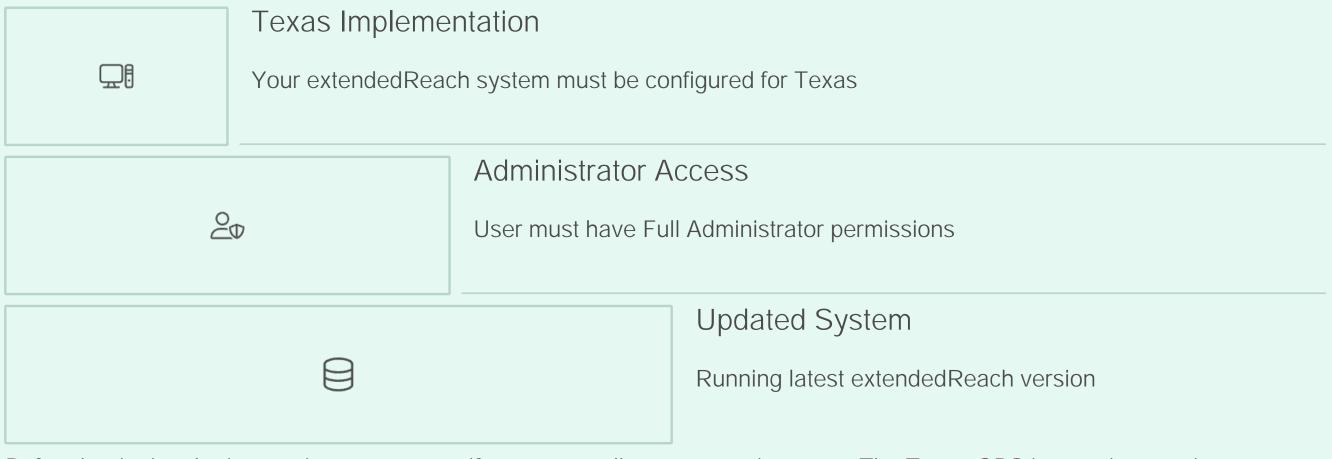


Time Efficiency

Save valuable staff time by eliminating duplicate data entry across multiple systems.

System Prerequisites

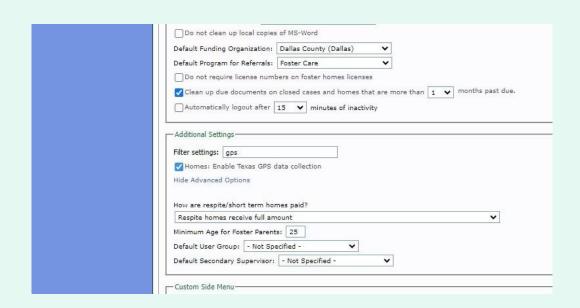




Before beginning the integration process, verify you meet all system requirements. The Texas GPS integration requires your extendedReach implementation to be specifically configured for Texas child welfare operations. Additionally, you'll need full administrator permissions to access the necessary configuration settings.

Enabling the GPS Integration

Access Administration Panel Navigate to your workspace and select the Administration Menu Enter System Settings Locate and select the System Settings option Find GPS Integration Option Scroll to find "Homes: Enable Texas GPS data collection" Activate the Feature Check the box to enable the integration



System Changes After Activation



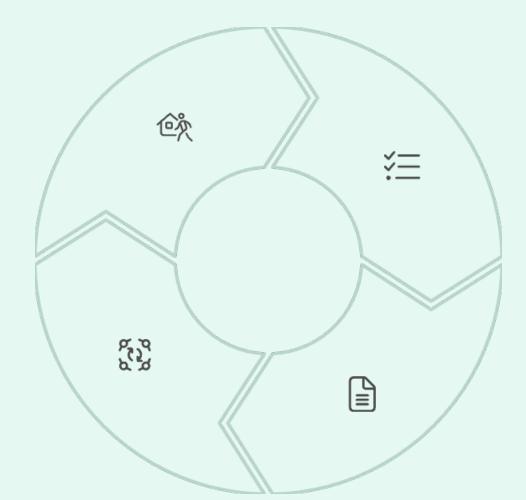
Home Files Updates

GPS Identification section appears on the General tab

Real-time Data Transfer

Data automatically syncs with Texas

GPS system



New GPS Criteria Tab

Dedicated tab for entering and managing GPS criteria

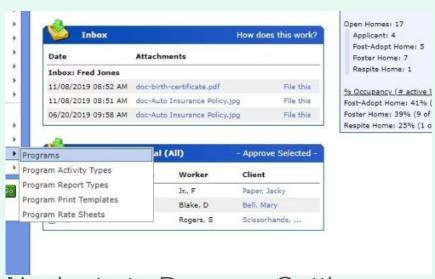
Case File Updates

Anticipated Discharge field becomes required

After enabling the GPS integration, you'll notice several changes to your extendedReach interface. The system will display new fields and tabs designed specifically for GPS data collection. Most importantly, the Anticipated Discharge field becomes required for all case files to ensure compliance with state reporting requirements.

Managing Anticipated Discharge Field Requirements





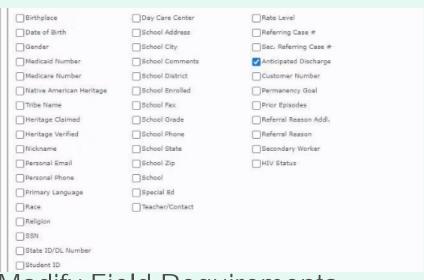
Navigate to Program Settings

From your workspace, access

Administration Menu, then select Program

Settings followed by Programs to view all

available programs in your system.



Modify Field Requirements

For programs not reporting to GPS, uncheck the Anticipated Discharge requirement box to remove this field constraint from non-GPS programs.



Save Your Changes

After making your selections, be sure to save all changes to apply the updated field requirements across your system.



Configuring GPS Integration Contact Information



Primary Contact

Designate a staff member who will serve as the main point of contact for GPS-related communications from the Texas Department of Family and Protective Services.

- Must be an active staff member
- Should have knowledge of placement processes
- Will receive system notifications

Secondary Contact

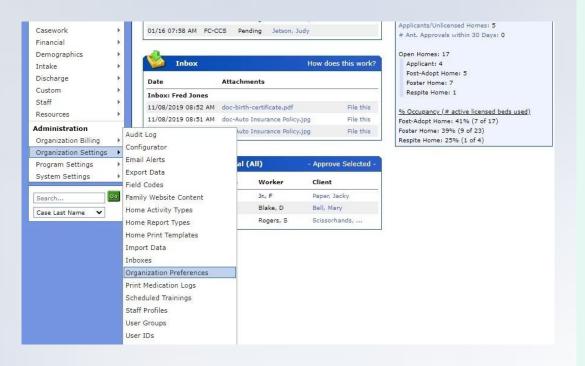
Identify a backup contact person who can address GPS inquiries when the primary contact is unavailable.

- Ensures continuous communication
- Receives notifications when primary is absent
- Should have similar system knowledge

Technical Support

Add a technical contact who can troubleshoot any integration issues that might arise with the data transfer.

- May be IT staff or system administrator
- Receives error notifications
- Coordinates with extendedReach support



Next Steps and Support Resources





After completing the integration setup, focus on training your team and populating the system with accurate placement data. Remember that extendedReach support is available to assist with any technical questions during your implementation process. For Texas-specific questions, contact your regional DFPS representative.





Texas GPS Integration Data Point Fields - Home File (Foster Care)

This article will give an overview of the data point fields for the Texas Department of Family and Protective Services General Placement Search (GPS) integration within the home file.

With Texas CPS providers being required to submit placement criteria and vacancies to the (GPS) we offer an electronic data transfer (EDT) of GPS data through extendedReach. Data entered into extendedReach will be sent to GPS in real-time as it is saved.





Prerequisites for Texas GPS Integration

Texas GPS Integration enabled

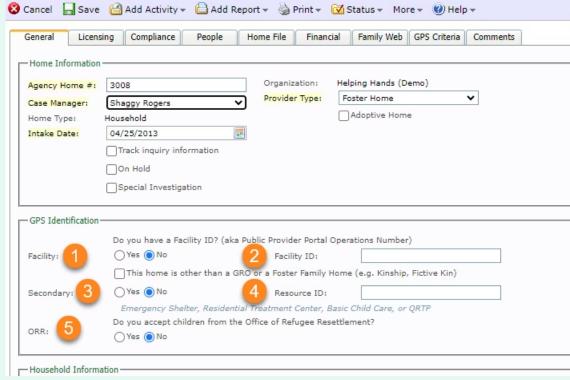
Follow the guide: <u>Enabling Texas GPS Integration (Foster Care)</u>

User Permissions

An extendedReach User ID with the Edit Homes permission

Home File: General Tab - GPS Identification





Facility

For homes that do not need to send data to GPS there is the **No** option. For those that do, there is the **Yes** option. When **Yes** is selected the Facility ID field will be required. The checkbox is available for home that fictive kin or kinship to be filtered out of the GPS submission.

Faci

Facility ID

This ID is used to match the home record to its GPS record. This ID comes from the public provider portal where licensing information about the home is found.



Secondary

For homes that do not have secondary and QRTP contracts there is the **No** option. For those that do, there is the **Yes** option. When **Yes** is selected the Resource ID field will be required.



Resource ID

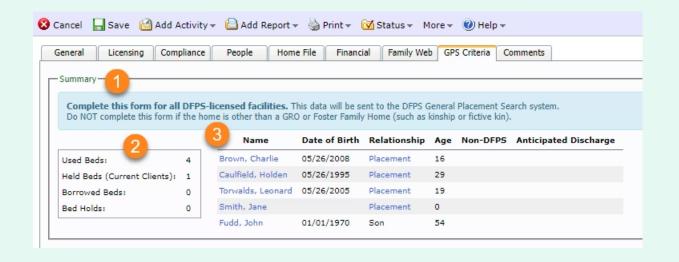
This ID is used to match the home record to its GPS record for secondary and QRTP providers.



ORR

Home File: GPS Criteria Tab - Summary





Key Components

1 Message about who needs to or does not need to complete this form/page.

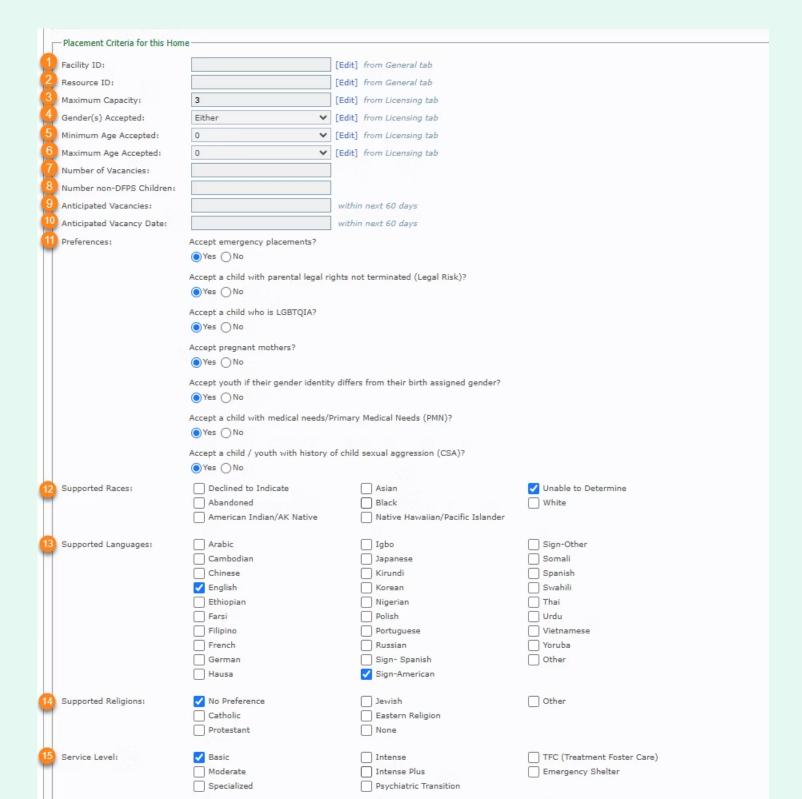
Beds Area

Counts box displays the used beds, help beds (current clients), borrowed beds, and bed holds count for the home.

Placement/Household Grid

Information is displayed including name, date of birth, relationship, age, non-DFPS status, and anticipated discharge for all placements and household members that are not the Parent A or B.

Home File: GPS Criteria Tab - Placement Criteria



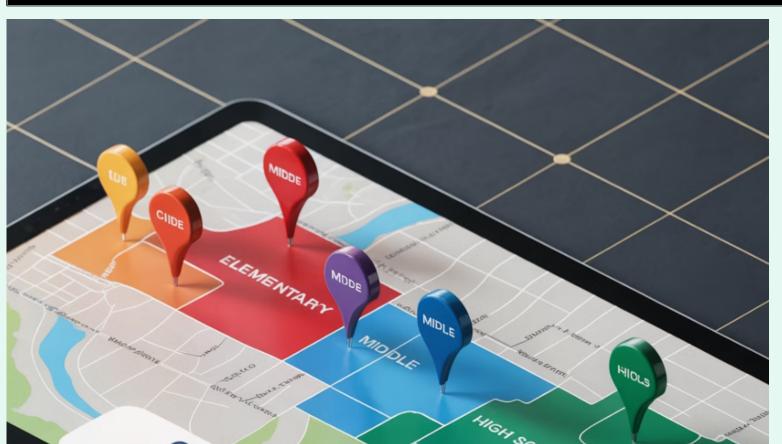


earch School Districts:	ente	r district name to search
	Name	Code
	Abbott ISD	109901
	Abernathy ISD	095901
	Abilene ISD	221901
	Academy ISD	014901
	Adrian ISD	180903
	Asia Dulas ICD	170001
Selected District Code:		
Elementary School Name:	[Edit]	from General tab
Is Charter School:	Yes No	
Middle School Name:	[Edit]	from General tab
Is Charter School:	Yes No	
High School Name:	[Edit]	from General tab
Is Charter School:	○Yes No	

Home File: GPS Criteria Tab - School Information



Search School Districts	Can search for applicable school district in the search bar or from the list
Selected District Code	Displays selected school district code
Elementary School Name	Displays elementary school name pulled from the General tab of the home
Is Charter School (Elementary)	Yes or No option for elementary school
Middle School Name	Displays middle school name pulled from the General tab of the home
Is Charter School (Middle)	Yes or No option for middle school
High School Name	Displays high school name pulled from the General tab of the home
Is Charter School (High)	Yes or No option for high school



	— Additional Placement Information —	
1		
	300 character maximum	
2	Synchronization Results Last Attempted:	
3	Status: Response:	

Home File: GPS Criteria Tab - Additional Information



Additional Placement Information

Text box to provide a place to type any additional placement information with a max of 300 characters.

Synchronization Status

Last Attempted: Lists the time and date of last synchronization.

Status: Lists the status for the home, never, excluded, or success.

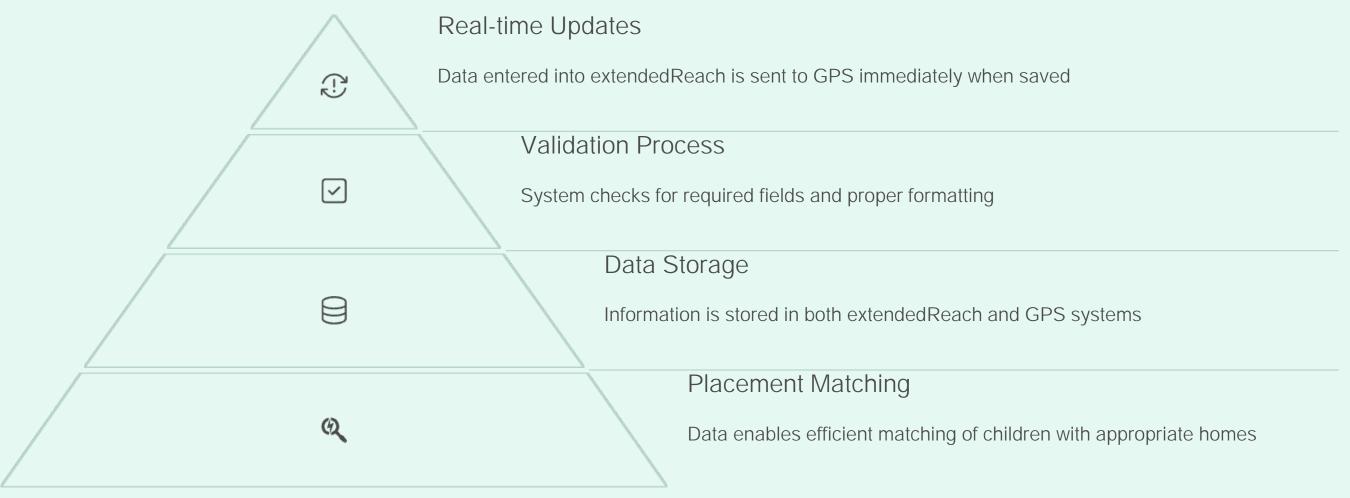
Response Details

For reason of status other than success.

This information helps track the synchronization process between extendedReach and the Texas GPS system, ensuring data is properly transferred and any issues are identified.

Data Synchronization Process





The Texas GPS Integration ensures that foster home information is accurately maintained across systems, improving placement efficiency and reducing administrative burden. By automating data transfer between extendedReach and the Texas Department of Family and Protective Services General Placement Search system, agencies can focus more on quality care and less on duplicate data entry.



Texas Provider Gateway

Content:

- Introduction and Initial Setup
- Testing the Connection
- TPG Home Report
- Additional TPG Settings





Introduction and Initial Setup

extendedReach can automatically update Foster Home information on the Texas Provider Gateway (TPG)! This is done by matching Foster Homes in extendedReach to homes on the TPG site using the homes "Resource ID" or "RID".

The interface will only transmit updated information for existing homes already on the listed on the TPG. The TPG requires that new homes be created manually by a TPG user id first (vs. updated by extendedReach).

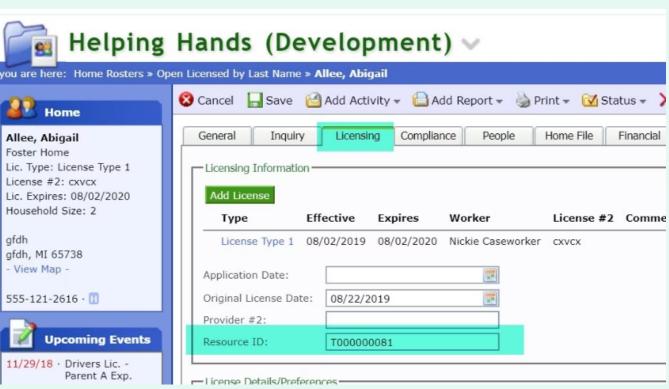
The "RID" is an identifying number assigned by State of Texas's IMPACT computer system. When a new home is added to the TPG, a temporary RID is assigned by the TPG system until the official RID is assigned by the IMPACT computer system. The interface between extendedReach and TPG works with both temporary RIDs and official (IMPACT) RIDs.

"SSCC" refers to the "Single Source Continuum Contractor" which is the lead contractor for a particular region in Texas. The TPG acts as a data exchange between foster care agencies and the SSCC's.

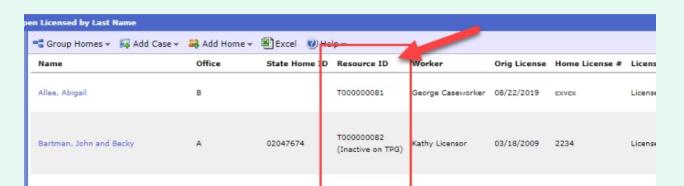


Process to start TPG interface configuration:

- 1. Contact your SSCC's system administrator for the Texas Provider Gateway and ask that an "API User ID" be created and added to your TPG account.
- One the "API User ID" has been created, submit a support ticket to extendedReach asking that the TPG be enabled. Please include the "API User ID" name and password in the support ticket.
- extendedReach support will enable the TPG interface and RID tracking.
- Your agency will then manually input the RID number on each home file (see image below).



The RID number will be viewable for all homes under the Home Roster > Licensed Homes view.



Testing the Connection



Enter RID Numbers

To test the connection between extendedReach and TPG and confirm the information sends correctly, enter in the RID number for a few homes (not all).

Access TPG Settings

Go to Organization Settings >
Organization Preferences > General
Tab. Scroll down to the Texas Provider
Gateway section.

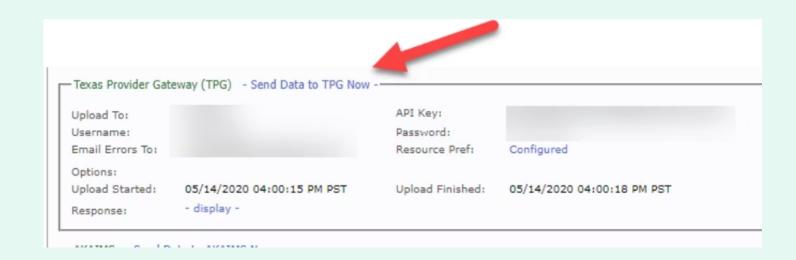
Send Test Data

Click on "Send Data to TPG Now" (must not be in Edit mode).

Set Up Scheduled Sync

If the information transfers properly, you can go back and enter in the RID for the remaining homes. You can also set up a scheduled sync to TPG to send data once a day at 6 PM CST.

To set up the scheduled sync, click on Edit under Organization Settings > Organization Preferences; go to the General tab and the Texas Provider Gateway section. Click on "Schedule at approx 6 PM CST daily" then save.



TPG Home Report



ů

Add/Configure New Home Report Type

Once you have the TPG / extendedReach link working successfully, you can add/configure a new Home Report Type to use the "TPG Resource Preferences"; these preferences will automatically transfer to the TPG.



Configure Custom Subform

When configuring the report, click on the Custom tab under the report settings and add "S_HOME_TPG_PREFS" (remove quotations) as the Custom Subform name. You should only use this subform in a single Home Report Type for the entire agency. (Don't create different ones for different Provider Types).



Enable Family Website Access

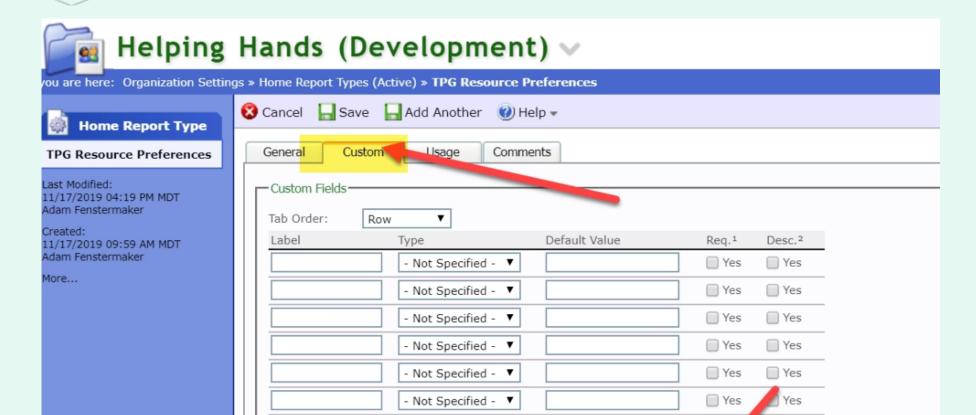
Homes can fill out the TPG Resource Preferences form directly from the Family Website as well. To set up this configuration, go to the settings of the TPG Resource Preferences Home Report Type and click on Show Advanced Options in the configuration area. Enable the setting "Foster Home initiated report using custom form (advanced)" then add "F_FRM_TPG_PREFS" (no quotations) as the Family Form name.

Verify Configuration



To verify that the report is set up properly, go to Organization Settings > Organization Preferences > General Tab. Scroll down to the Texas Provider Gateway section and check to see if it says "Configured" under the Resources Pref field. Clicking on the hyperlinked "Configured" word will re-direct you to the report.

Once configured, it will send the TPG Preferences for each home that has it filled out to TPG.



Additional TPG Settings



Email copies of XML files

Sends copies of the transmitted and received files to the "Email Errors To" email address. (Only meant for Troubleshooting)

Transmit only for specific branches

Allows you to transmit TPG only for specific branches/locations

Transmit first x homes

Transmit only the first 1, 5, 25, 50, or 100 homes to TPG (Only meant for Troubleshooting) (homes are transmitted in alphabetical order by home last name)

Transmit one home using RID

Transmit only a single home identified by Resource ID (Only meant for Troubleshooting)

Congrats! You are all set up and ready to go with the TPG / extendedReach interface. If you have any questions or need troubleshooting assistance with the TPG integration, please email support@extendedreach.com.

Foster Care - How do I discharge a case?

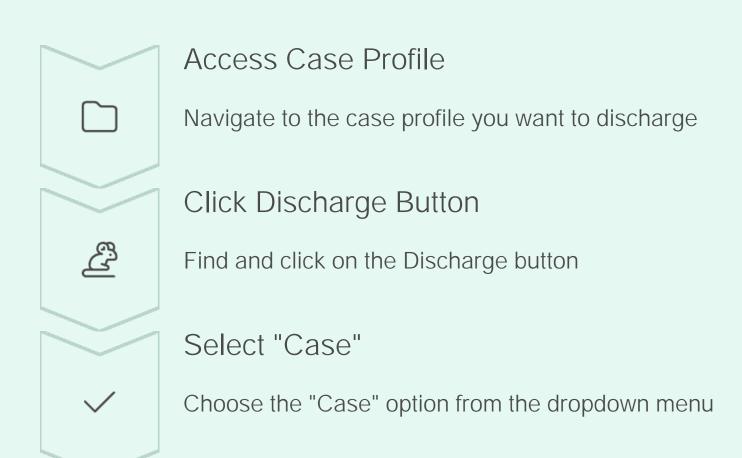
by Emily Parks



en by Last Name > Minnie, M. Back Sedit Add Activity Add Report Solution General Referral Health Compliance People Case File Treatment Financial Foster Care Case Information Agency Case #: 10682 Organization: Helping Hands FC Worker: Sophie Supervisor Office: - Not Specified Behavioral Specialist: - Not Specified Program: Demo DHS Foster Care

Initiating the Discharge Process





To discharge a case, go to the case profile and click on the Discharge button and select "Case".

Completing the Discharge Form

Disable Pop-up Blocker

Make sure your pop-up blocker is disabled for extendedReach or else you will not be able is discharge the case.

Fill Required Fields

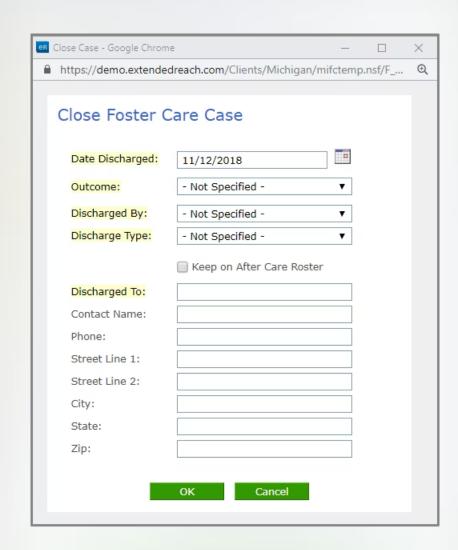
At minimum, fill in the yellow, highlighted fields and then press Ok.

Submit Form

Press the Ok button to complete the discharge process.

A pop-up will then appear asking for additional discharge information -- make sure your pop-up blocker is disabled for extendedReach or else you will not be able is discharge the case.

At minimum, fill in the yellow, highlighted fields and then press Ok.



you are here: Case Rosters » All by Case DISCHARGED James Baby Demo DHS Foster Care

Confirming Case Discharge



Submit Discharge Form

Press the Ok button on the discharge information form

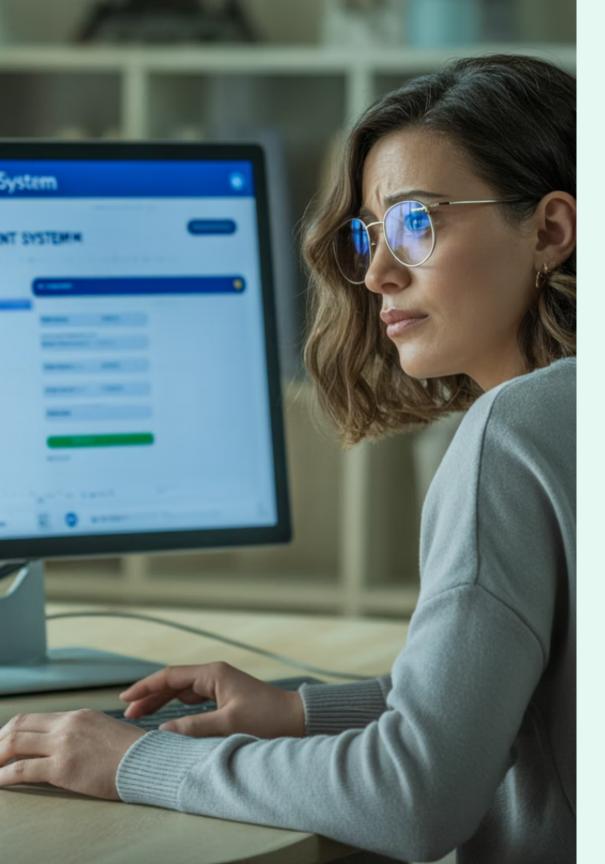
Wait for Screen Refresh

The system will process your request and refresh the page

Verify Discharge Status

Look for "Discharged" label next to the client's name

Once you press Ok, the screen will refresh and the case will say "Discharged" next to the clients name.



Troubleshooting Missing Discharge Button





Security Restrictions

Your agency may have security restrictions in place that prevent certain users from discharging cases



Permission Levels

Different user roles have different levels of access to system functions



Contact Administrator

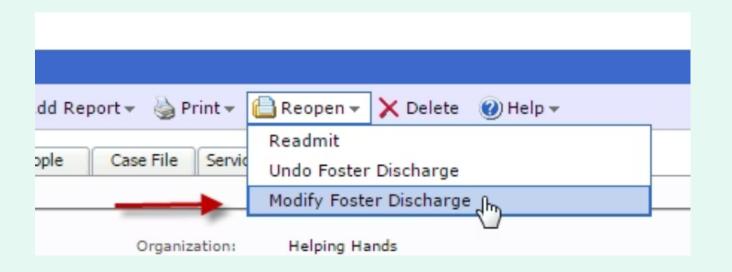
Reach out to your agency administrator for assistance with permissions

If you did not see the discharge button on the case screen, please contact your agency administrator as they may have security restrictions in place that prevent users from discharging cases.



Foster Care - How can I change the discharge date, outcome, reason, or location?

If you have entered incorrect information when discharging a case, you can modify it using the "Reopen -> Modify Foster Discharge" option.



Why do tasks keep showing up on my task list for discharged cases?



If a case has been discharged/closed and you are receiving notifications for tasks that are due after the discharge date, this is due to a setting not being configured on those activities or reports.

To prevent repeat due dates for closed cases, go to the settings of a specific activity or report and make sure that "Delete if due after close date and case closed (stop repeating)" is checked:

Options:	✓ Due based on Event ✓
	0 months after Intake Date
	✓ Repeat due date every 6 months after previous Due Date ✓
	Expires after years
	Filter settings: enter search term
	Can schedule
	□ No show
	✓ Requires approval
The state of the s	Gran activity
7	
~~~	Lieux for duplicate activity type on same day
✓ Use system assigned abbreviation	
	Delete if due after close date and case closed (stop repeating)

Once this change is made, a system administrator will need to delete any of the Due activities/reports that appeared after the close date.



# Foster Care - Closing an Adoption Case

This presentation will guide you through the process of closing cases in the extendedReach system, covering the following topics:

- Introduction
- Closing a Foster Care Case
- Closing an Adoption Case
- Finalization/Disruption Date
- Changing Discharge Information





# Introduction

# Purpose

This article is meant to assist you with closing case in the extendedReach system.

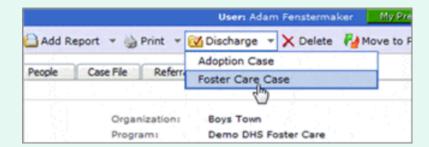
# Additional Support

If you have a question not addressed here, you can contact support at support@extendedreach.com



# Closing a Foster Care Case





## Access the Discharge Menu

From a case file, hover over the "Discharge" button in the action bar and click on "Foster Care Case" from the drop-down menu.

Note: this option is not available for all users. If the Discharge button is not available, please contact your agency administrator to discharge the case for you.

## Complete Required Fields

Complete the fields and click OK.

### Field Descriptions

View NameDescriptionDischarge All
SiblingsSelect "yes" or "no" from the drop-down
menu.OutcomeIndicate the outcome/reason for
the discharge from the drop-down
menu.Discharge TypeSelect "successful",
"unsuccessful", or "emergency" from the dropdown menu.Discharged ToFamily or facility the
case was discharged to.Contact NameName of
the best contact at the facility or household (if
applicable).AddressAddress of the family or
facility the case was discharged to.



# Closing an Adoption Case



#### Access Discharge Menu

From a case file, hover over the "Discharge" button in the action bar and click on "Adoption Case" from the drop-down menu.



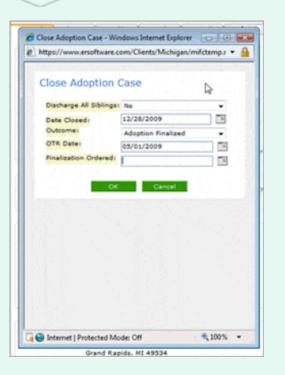
#### Complete Required Fields

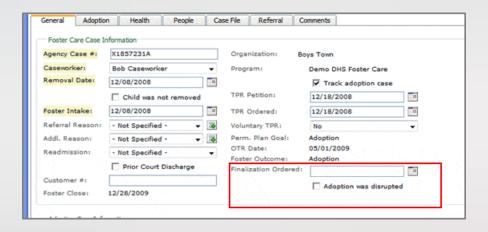
Complete the fields and click OK.



#### Field Descriptions

View NameDescriptionDischarge All SiblingsSelect "yes" or "no" from the drop-down menu. OutcomeIndicate the outcome/reason for the discharge. Finalization OrderedType in the date, or click on the calendar icon to select the date, when finalization was ordered.







# Finalization/Disruption Date



# Setting the Date

Type in the date, or click on the calendar icon to select the date, when finalization was ordered.

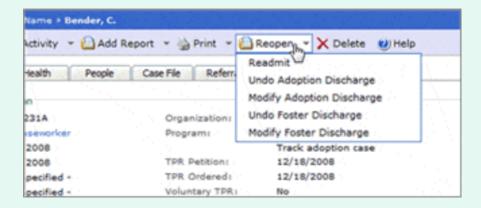


# Disruption Indicator

Place a check-mark in the box next to "Adoption was disrupted" if this is the case.

# Changing Discharge Information



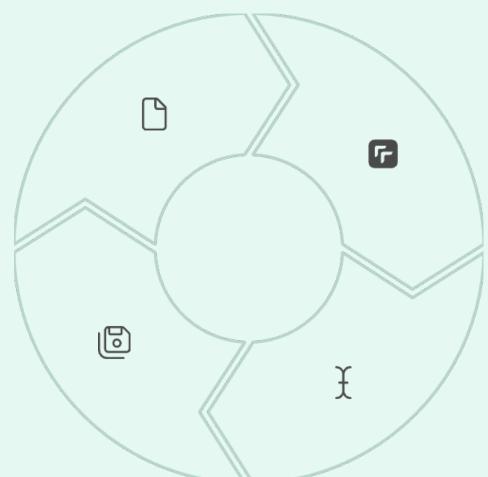


### Access Case File

Navigate to the case file you need to modify

Complete Changes

Make your modifications and save



## Find Reopen Button

Hover over the "Reopen" button in the action bar

#### Select Action

From the drop-down menu, click on the action you wish to change





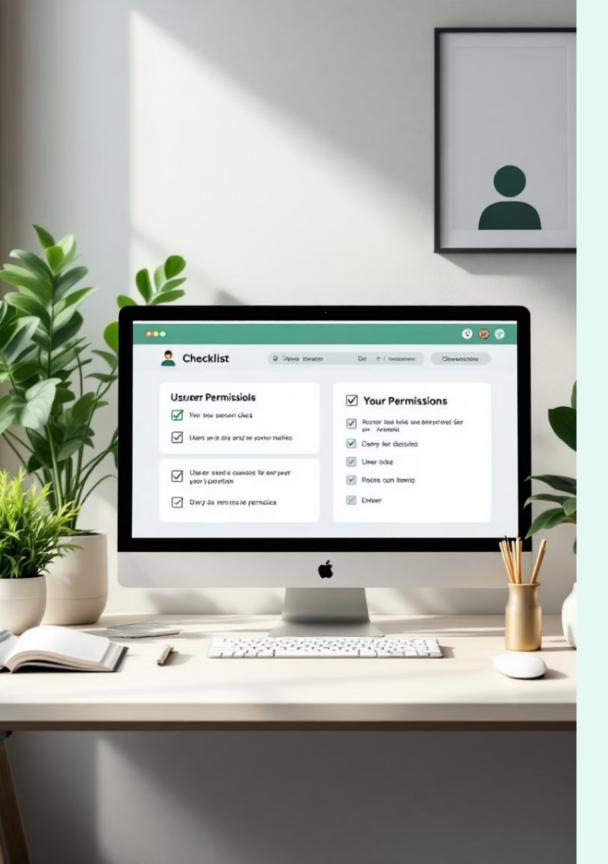
# Preparing eR for T3C

# to Meet Reporting Requirements





by Emily Parks



# Prerequisites and System Requirements



Texas Foster Care/Residential System/GCM System

Must have an active Texas Foster Care or Residential system already configured in extendedReach

Full Administrator Permissions

Requires an extendedReach User ID with Full Administrator user permissions to access configuration settings

System Evaluation Readiness

Prepared to assess current feature usage and determine configuration needs for T3C compliance

# Program Categories and Custom Fields Configuration



#### **Program Categories Assessment**

Review your ability to add program categories and subcategories for both legacy and T3C requirements. If possible, add categories for credentialed service packages and update existing program reports to include new categories.

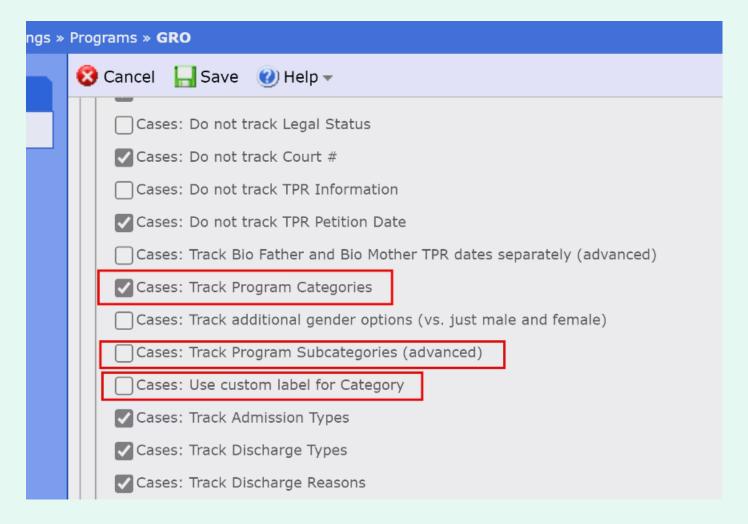
#### **Subcategory Formula**

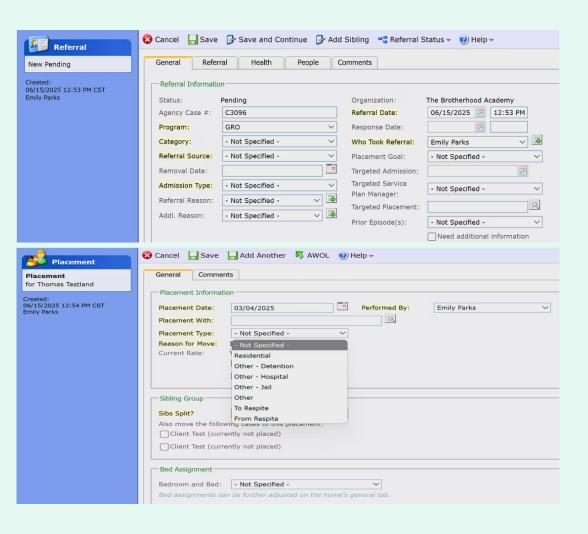
@If(CC_Category="Treatment Services";"ED (Emotional Disorder) |
ED":"ID (Intellectual Disability) | ID":"ASD (Autism Spectrum Disorder) |
ASD":"PMN (Primary Medical Needs) | PMN":"TV (Trafficking Victim) |
TV";CC_Category="T3C - Basic Foster Family Home Support Services":"T3C - Short-Term Assessment Support Services":"T3C - Mental & Behavioral
Health Support Services":"T3C - Complex Medical Needs or Medically
Fragile Support Services":"T3C - Intellectual or Developmentally Disability
(IDD)/Autism Spectrum Disorder Support Services":"T3C - Treatment
Foster Family Care Support Services";"A. Transition Support for Youth and
Young Adults":"B. Kinship Caregiver Support":"C. Pregnant and Parenting
Youth":"D. None":"Treatment Services: ED (Emotional Disorder) |
ED":"Treatment Services: ID (Intellectual Disability) | ID":"Treatment
Services: ASD (Autism Spectrum Disorder) | ASD":"Treatment Services:
PMN (Primary Medical Needs) | PMN":"Treatment Services: TV
(Trafficking Victim) | TV";"")

• Formula is plug and play. Just change the words inside the parenthesis "xxx", or add a colon and new parenthesis to add legacy options.

#### **Custom Fields Evaluation**

Examine current program custom field usage and availability. Determine if you have sufficient extra fields to accommodate T3C requirements, or if a new program addition is necessary.





# Referral Tracking and Respite Management



# Referral System Setup Enable referral tracking if not currently active and add necessary denial reasons for T3C compliance. 2 Places in eR to configure: Uncheck box below

Program Settings > Setup Tab

Cases: Do not track referrals

Org Settings > Org Preferences > Settings Tab

#### Reporting Configuration

Configure reporting for pending and rejected referrals to maintain comprehensive tracking

Additional Settings:

| Filter settings: | [refer] |
| Referrals: Track pending and rejected referrals |
| Referrals: Don't track Referral Source |
| Referrals: Sendyreceive on-line referrals for transferred cases (LEGACY - DO NOT USE) (advanced) |
| Referrals: Require Reason for Referral |
| Referrals: Require Prior Episode(s) |
| Referrals: Don't track Referring Worker

#### Respite Home Tracking

Ensure respite tracking covers both legacy and T3C placements with appropriate payment configurations

-Rates for legacy and T3C in Programs > Program Rate Sheets

Org Settings > Org Prefs > Settings > Scroll down and select.

May need a zero-dollar rate for when Homes have more than 40 hrs-respite/year.



# Foster Parent Training and Provider Types



#### Training Hours Configuration

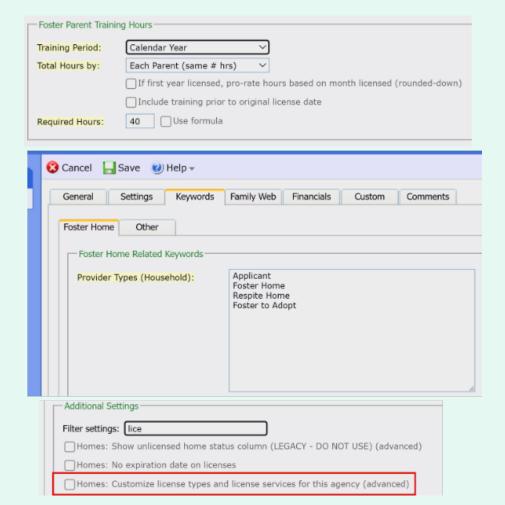
Configure Foster Parent Training Hours to meet both legacy and new T3C requirements. Custom formulas available through Customer Success Manager if needed.

#### Provider Type Matching

Add provider types that align with credentialed service packages for T3C. Update existing home reports and Foster Family Website access accordingly.

#### License Type Updates

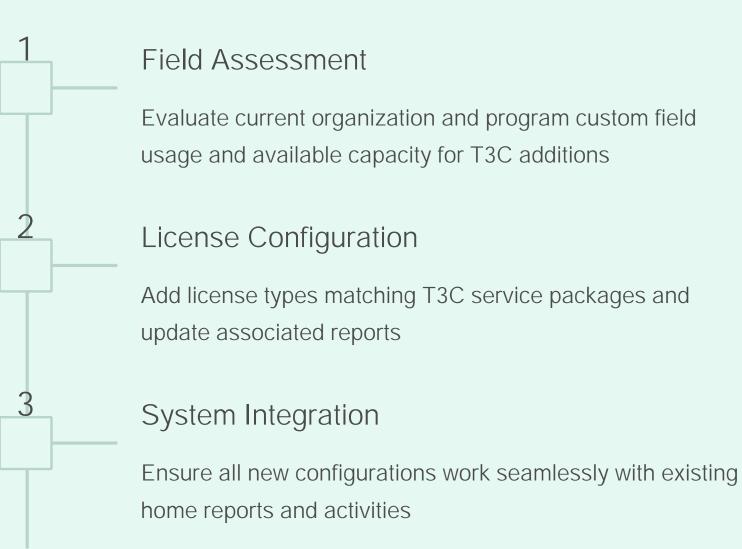
Establish license types that correspond to T3C service packages and update home reports with new license triggers.

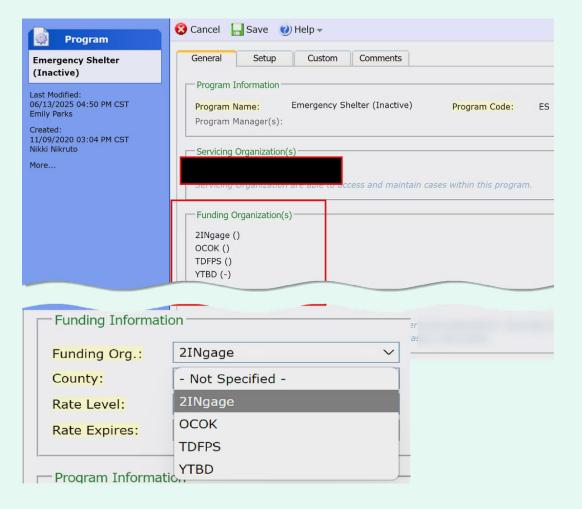




# Organization Custom Fields and License Management







# ExtendedReach Support Services





#### **Funding**

#### **Organizations**

Email Support to add required funding organizations to your T3C programs.

These will be your SSCCs you contract with



#### **Enterprise Financials**

Contact Customer Success

Manager for T3C enterprise

financial setup assistance



#### Rate Sheets & Reports

Custom import services for service package rates and Zoho report templates for outcome tracking



## **Revision Tracking**

Email Support to ask what revisions are currently enabled in your system. Revisions enable date tracking for case and home file changes required for T3C compliance. ex.

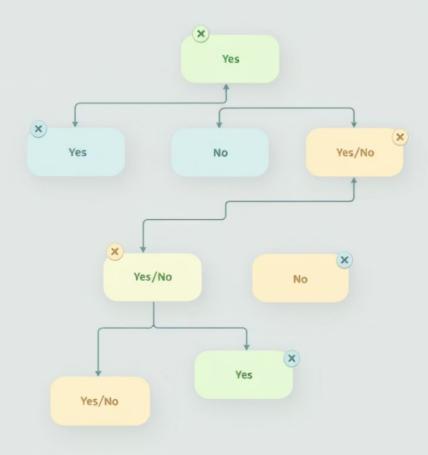
Categories, subcategories, custom fields



#### Revisions

Any field in eR can have a revision date added. Revisions allow you to backdate when a particular field changes. eR will track all revisions under the Case File and Home File Tab (sort by revisions)

#### **Decision Tree**



# Implementation Decision Framework



### **Evaluate Current Capabilities**

Review each feature against T3C requirements using the provided assessment questions. Determine if existing configurations can accommodate new needs or if system expansion is necessary. Whispering Pines Consulting can help evaluate your system for efficiency.

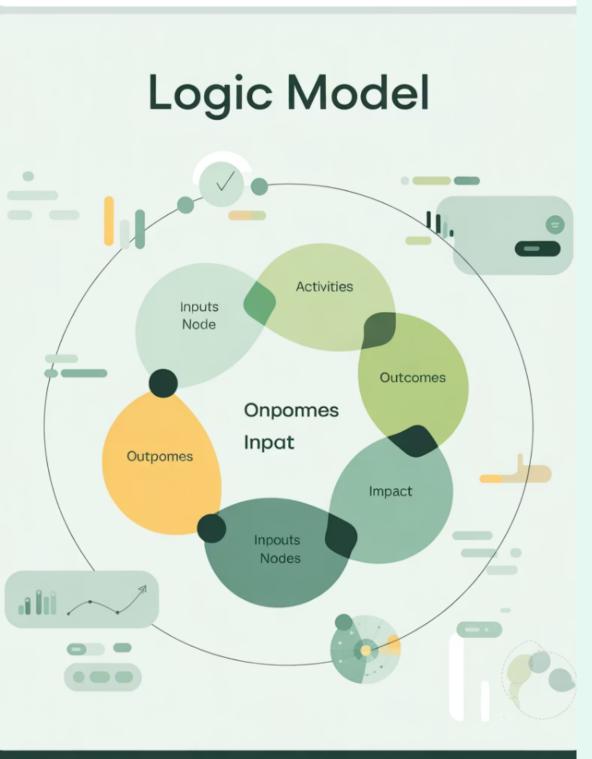
## Configure or Expand

If current features are sufficient, proceed with configuration using linked help articles. If not, consider adding new programs or organizations while consulting with your Customer Success Manager.

## Implement and Monitor

Execute chosen configuration strategy, ensuring all T3C requirements are met while maintaining efficient record tracking. Utilize extendedReach support services as needed for specialized implementations.





# Logic Models and Outcome Measurement

Bolded outcomes should be incorporated into Logic Models - but how to define/measure will be specific to each agency - below are some internal eR report examples:



by Emily Parks

# Safety Outcome Measurement

## Casework -> Incidents -> By Type Abuse/Neglect

Track and measure incidents categorized as abuse or neglect to ensure safety standards are maintained.

## Casework -> Incidents -> By Type -> Restraints

Monitor the frequency and circumstances of restraint usage to minimize restrictive interventions.

#### Casework -> Incidents -> By Type -> Injury

Document and analyze injury incidents to identify patterns and implement preventative measures.

## Casework -> Placements -> By Subsequent Placement

Evaluate placement stability and transitions to ensure safe and appropriate environments.



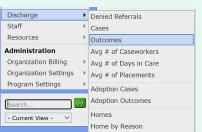
# Permanency Outcome Measurement



# **Discharge**

D/C Outcome = Permanency Goal

Discharge -> D/C Outcome = Permanency Goal

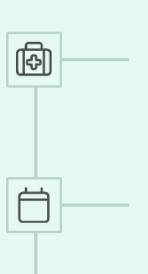




#### 



# Well-Being Outcome Measurement



# **Specific Activities Completed**

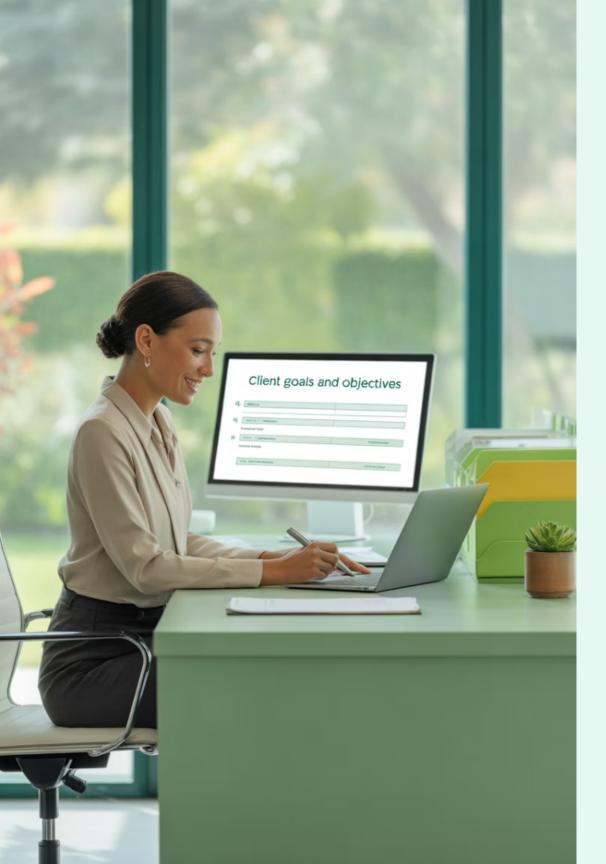
Medical, Dental, Therapy, etc.

# Compliance with Healthcare Appts.

Tracking attendance and follow-through with scheduled appointments

# Service Plan Goal Progress

Tx Tab -> Casework -> Treatment Goals or Zoho



# Implementation Requirements





## Required Documentation

Also - ensure that agencies are using the TX Single Child Plan of Service custom form. Reach out to your Customer Success Manager to copy the custom form into your system. It comes field coded



# Consistent Reporting

Maintain standardized documentation practices across all cases



# Regular Updates

Keep service plans current with client progress and changing needs

# extendedReach Side Menu for Reports



#### Organization

extendedReach is organized in a manner that allows you to easily access information.

Your workspace is customized to meet your specific needs based on your role within your agency.

The Side Menu, however, provides comprehensive agencywide data, accessed through "Views".

#### Permissions

Depending on your User ID permissions, some of these views may not be viewable for you. Please contact your agency administrators for permission to access those views.

The Administration tools are restricted to administrative use only.

#### My Stuff

- My Workspace
- My Tasks
- Cases

#### Case Management

- Case Rosters
- Case Tasks

#### Home Management

- Homes
- Home Rosters
- Home Tasks
- HomeMatch™

#### Reporting

- Summaries
- Dashboard
- Casework
- Demographics
- Intake
- Discharge
- Staff
- Resources

#### Administration

- Organization Billing
- Organization Settings
- Program Settings
- System Settings

# Zoho Reports





Third-Party Integration

Zoho Reports (http://reports.zoho.com) is a 3rd party custom report and dashboard builder available as an optional add-on item.



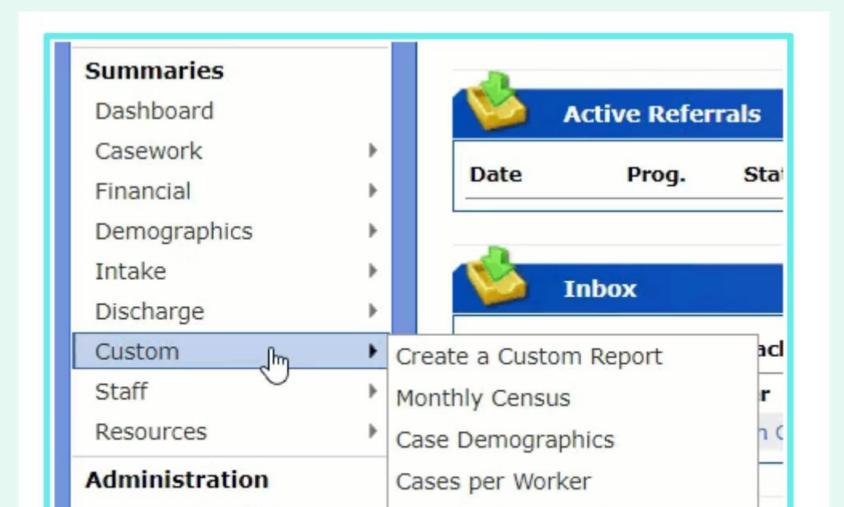
Availability

If your agency doesn't currently have this option and you are interested in learning more, please contact <a href="mailto:sales@extendedreach.com">sales@extendedreach.com</a>.



#### Functionality

Zoho Reports allows an administrator to quickly build charts, tables, and dashboards using an intuitive drag-and-drop interface. Once your reports are built, you can choose to add them to the side-menu in extendedReach and share with others in your agency. Zoho reports is restricted to administrative use only; publishing the reports to the side-menu allows all staff to view the report.



# Access Rights Configuration



#### Security Rights Navigation

Access to the side menu reports is given in the User ID or User Group > Security Rights > Navigation

#### Menu Access Options

- Access Case Menus
- Access Home Menus
- Access Summaries Menus
- Access Summaries (Staff & Resources)
- Access Summaries (Resources Only)

#### **Group Configuration**

Group Name: Caseworkers

Organization: Enchanted Family Services

Description: Child case worker

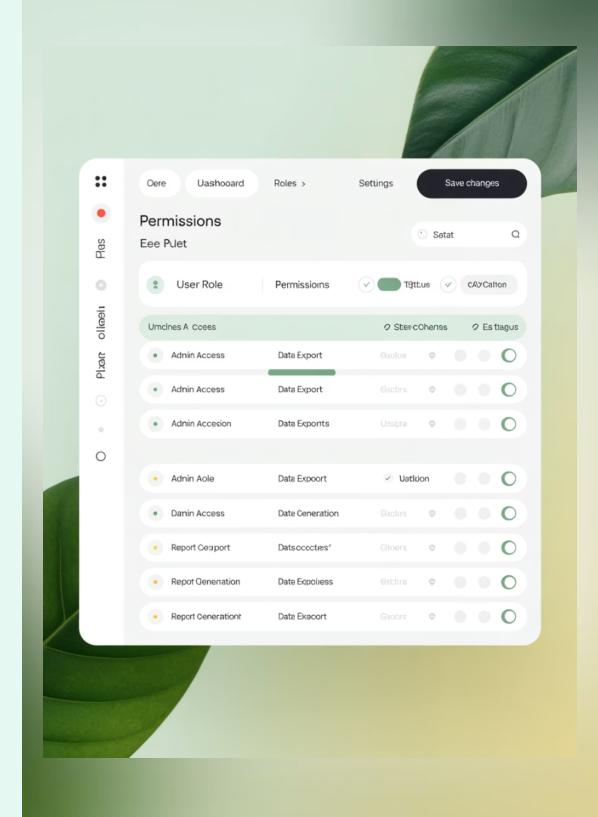
#### Permission Settings

Administrator: No

Security rights include options for Add, Delete, Edit, Approve, and Complete permissions for various modules



9





### Side Menu Actions



#### Filter by Branch

- Select a specific branch to filter records
- To view all branches, select "Show All Branches"

#### Export Data

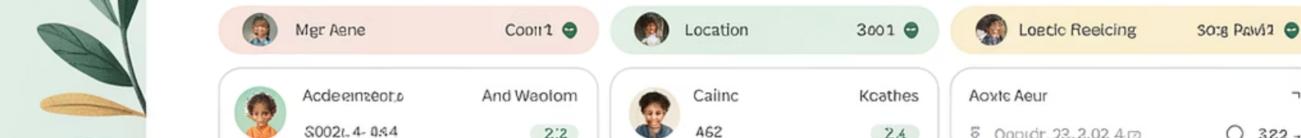
• Click the "Excel" button on the top menu bar to download, and you will be prompted to open the file

#### Organize Information

- Click the "Group" button on the top menu bar to group data in a variety of ways
- Click the plus or negative icons one by one, or
- Click "Expand All" button to expand everything at once

Note: You may see different naming for reports depending upon your agency configurations and programs (Foster Care, Adoption, Residential, etc.)



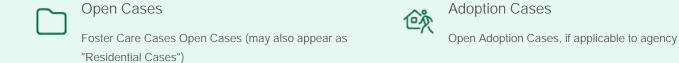




## Cases > Case Rosters

All Cases with an anticipated discharge date entered on case general tab

Anticipated Discharge





2:2

If your agency records changes in a child's height and weight (BMI) over time the last two measures will appear here along with a comparative calculation and any active medications.

#### Medications

♥ Oogidr 23.2.02 4.70

24

All pending and accepted referrals

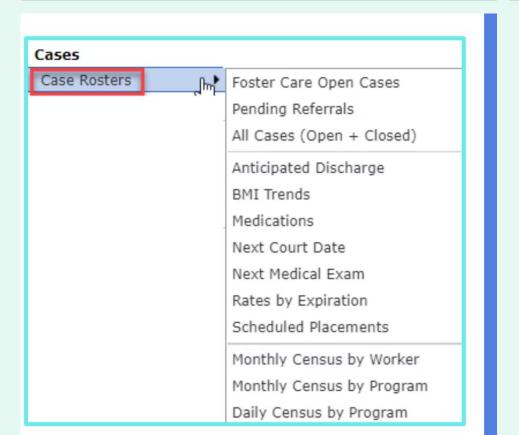
Referrals

Medications recorded for Open Cases

○ 322 →

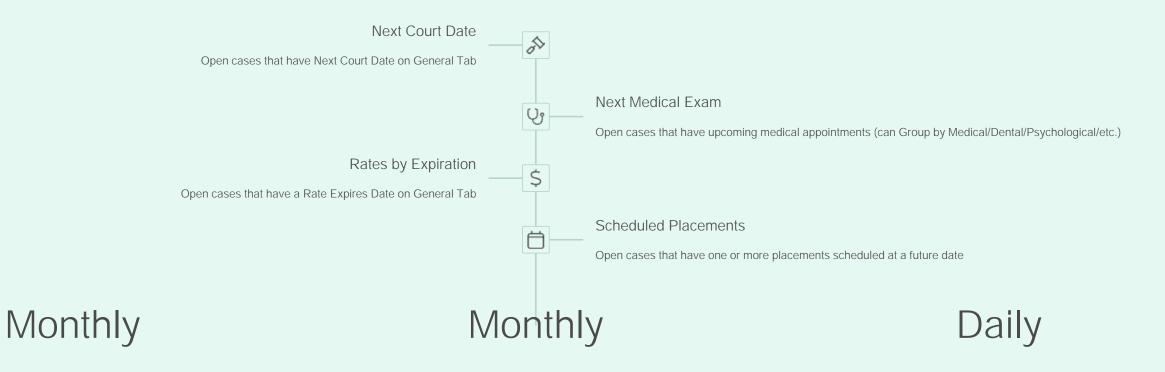
All Cases (Open + Closed)

All Cases



# Cases > Case Rosters (Continued)





Census by Worker

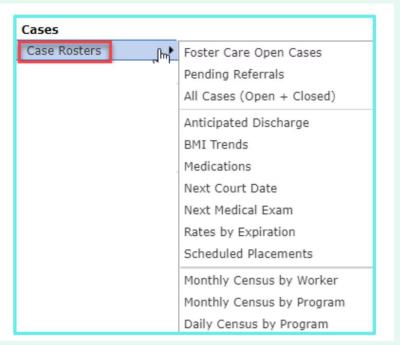
Census by Program

Census by Program

Number of Open Cases an Agency Case Worker has assigned to them in a particular month or in total over a year

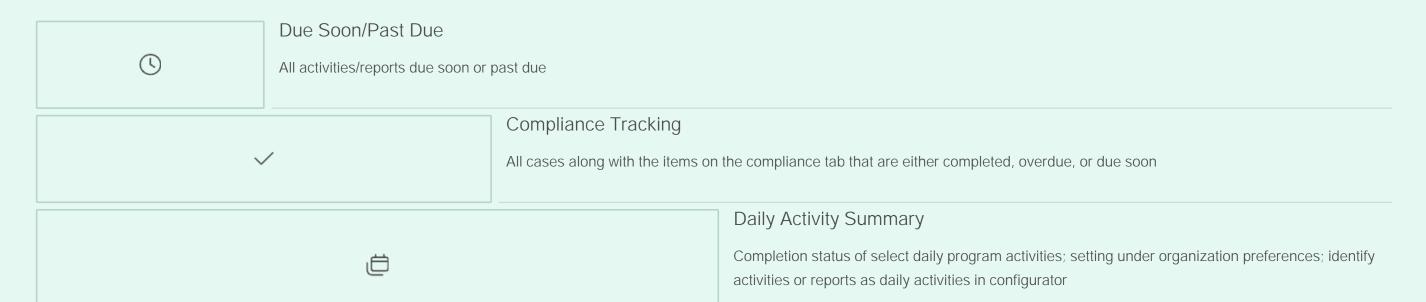
Number of Open Cases in a Program in a particular month or in total over a year

Number of Open Cases in a Program on a particular day or in total over a year



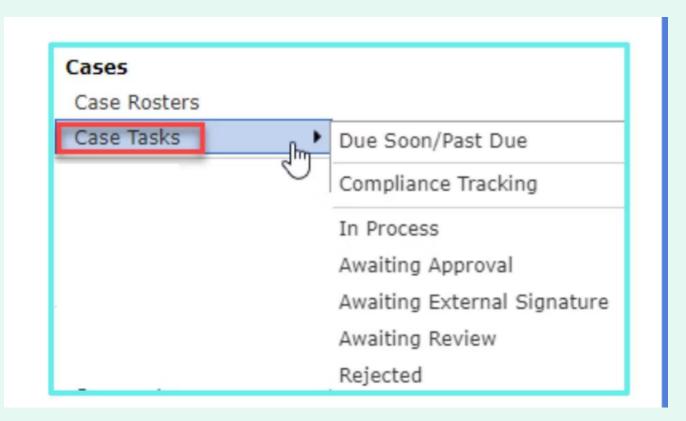
## Cases > Case Tasks





#### Workflow Status Reports

- In Process items in the process of being completed
- Awaiting Approvals items awaiting approval from a supervisor in order to be marked as complete
- Awaiting External Signatures (package specific) items awaiting external signatures
- Awaiting Review items awaiting review
- Rejected items rejected by approving person and returned to form creator

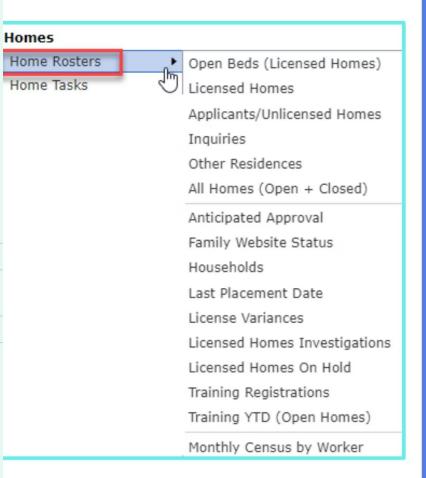


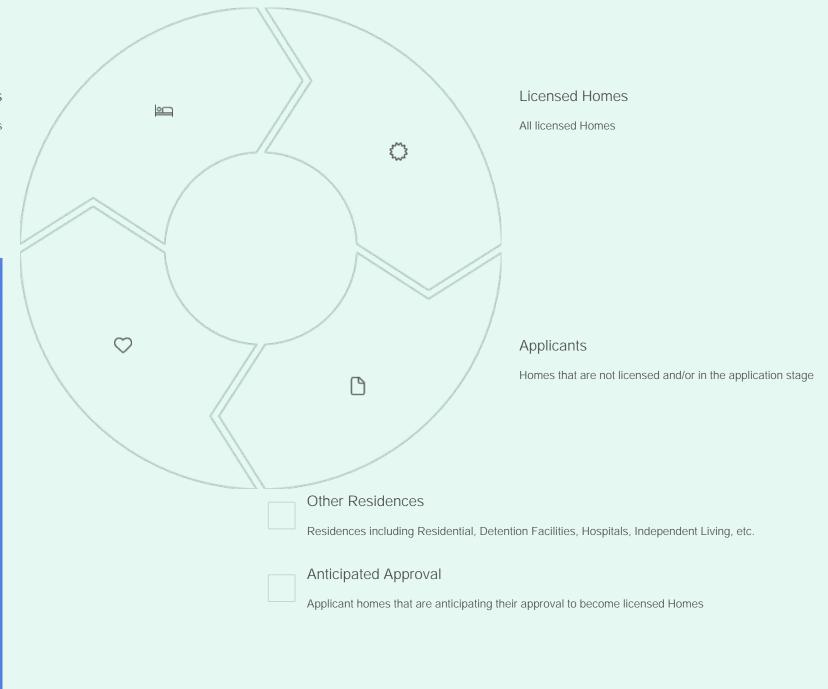
### Homes > Home Rosters



Open Beds

Licensed Homes that have beds available for cases





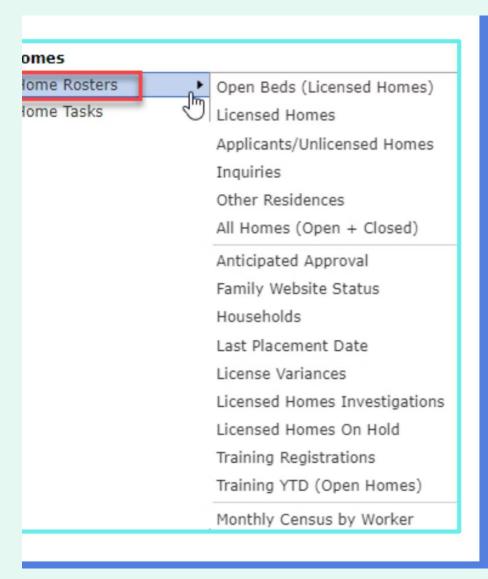
# Homes > Home Rosters (Continued)



Family Website Status	Homes that have either been invited or not invited to access their Family Website
Households	All Households which can be applicants, approved homes, etc.
Last Placement Date	Chronological order of recent placements (in or out)
License Variances	Any license variances with expiration dates
Licensed Home Investigations	Homes under investigation

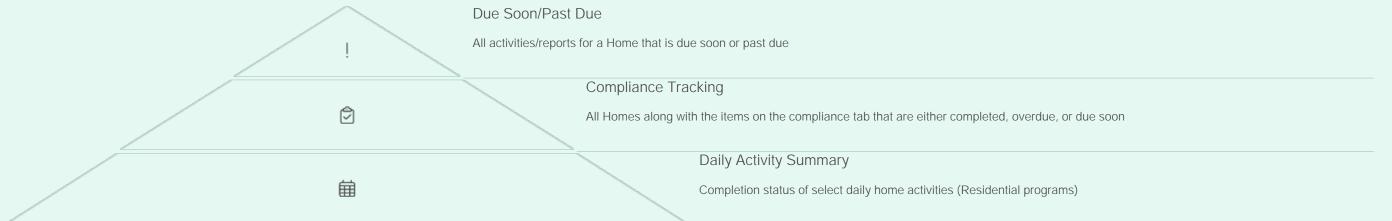
#### Additional Home Reports

- Licensed Homes on Hold All licensed homes put on hold
- Training Registrations Homes that have registered for training
- Training YTD (Open Homes) Year to Date training that has been attended and completed by all homes
- Monthly Census by Worker Workers' homes by year and month



### Homes > Home Tasks



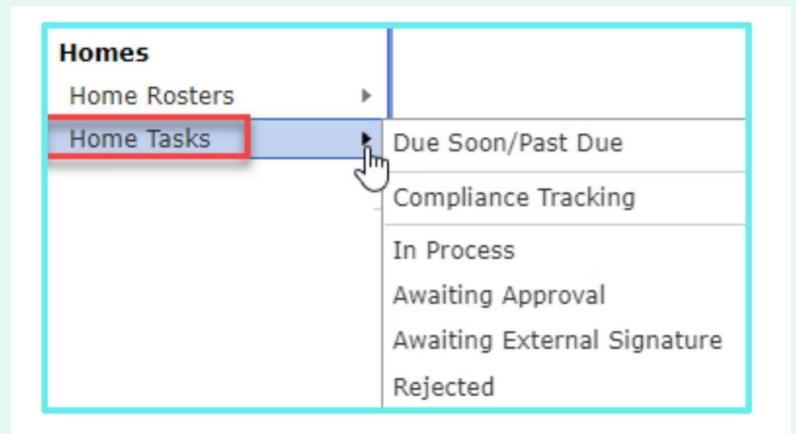


#### Workflow Status

- In Process Items that are in the process of being completed
- Awaiting Approvals Items that are awaiting approval from a supervisor to be marked as complete

#### **Document Status**

- Awaiting External Signatures (package specific) Items awaiting external signatures
- Rejected Items rejected by approving person and returned to form creator



# Summaries > Demographics

#### Cases Demographics

Cases segments and groups by:

- Age
- Gender
- Language
- Race
- Religion



#### Homes Demographics

Homes segments and groups by:

- Age
- Gender
- Language
- Race
- Religion

# Summaries > Intake



156

98

42

28

Referrals

# of referrals by year

Cases

# of cases by year

Homes Inquired

# of Homes that submitted inquiries each year

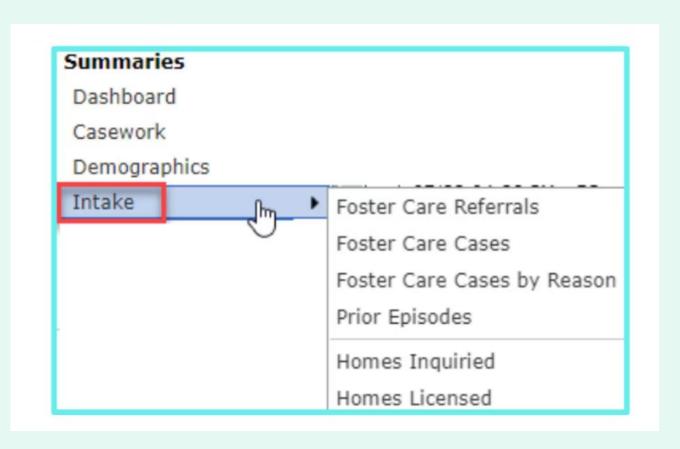
Homes Licensed

# of Homes licensed each year

### Case Analysis

- Cases by Reason # of cases and referral reasons
- Prior Episodes # of prior admissions and discharges for a case each year

These reports help agencies track the flow of new cases and understand the common reasons children enter care, allowing for better resource planning and identification of community needs.



# Summaries > Discharge







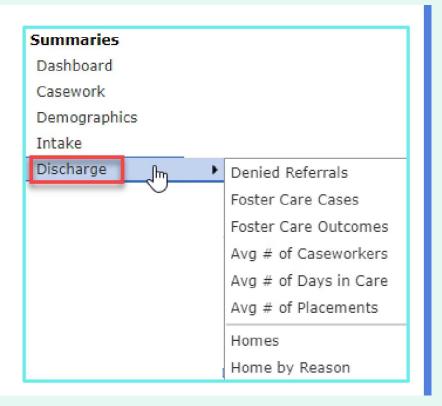
Homes
# of closed Homes each year

Avg # of Placements

Average # of case placements

Home by Reason

# of closed Homes sorted by reason



## Summaries > Staff





Directory

Provides a list of staff profiles

Compliance Tracking Lists compliance activities that are missing or completed by staff

NOTE will cover in Staff Management Session.



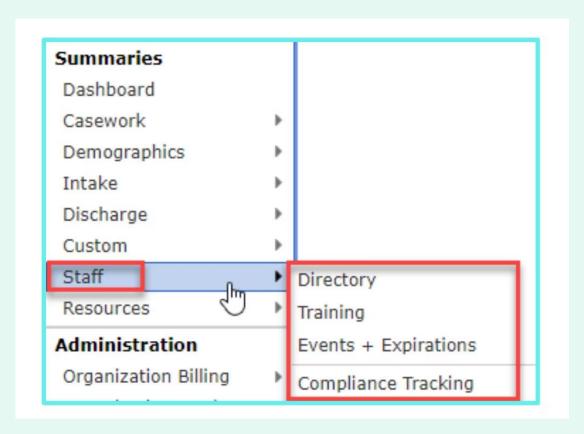
Training

Lists trainings and relevant training hours completed by staff



Events + Expirations

Lists expiration date of trainings for staff



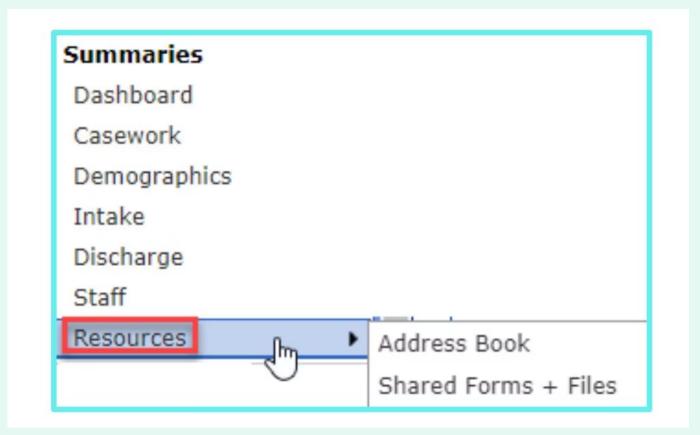
## Summaries > Resources



#### Address Book

Includes contact information for commonly used doctors, attorneys, dentists, therapists, social workers, etc. among cases

- Quick access to important contacts
- Centralized directory for all staff
- Searchable by profession or name
- Regularly updated with current information

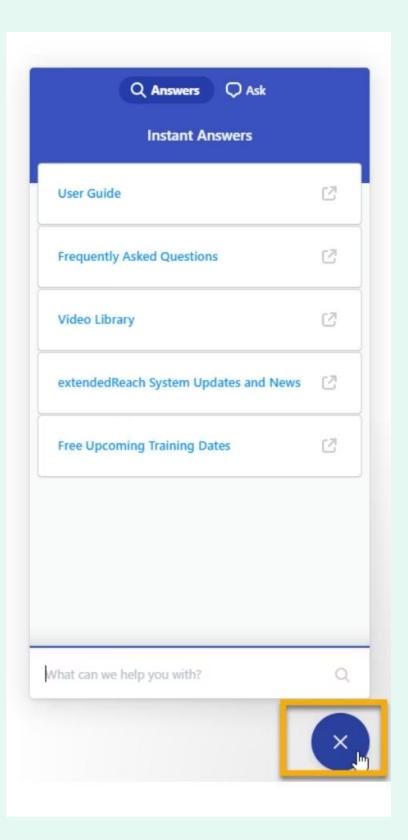


#### Shared Forms + Files

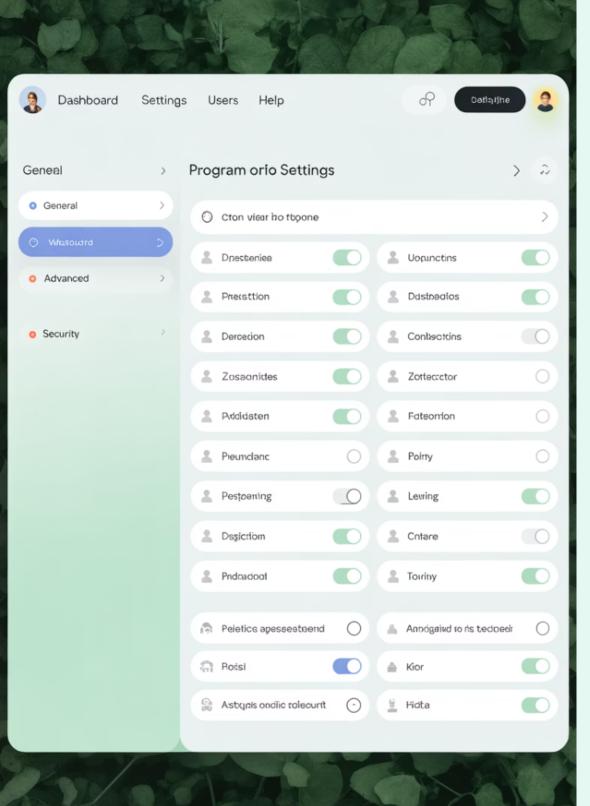
Centralized library of documents and forms that can be used throughout the organization and shared among cases and homes

- Standardized agency forms
- Policy and procedure documents
- Educational resources
- Training materials

# Support Resources



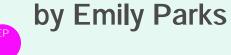




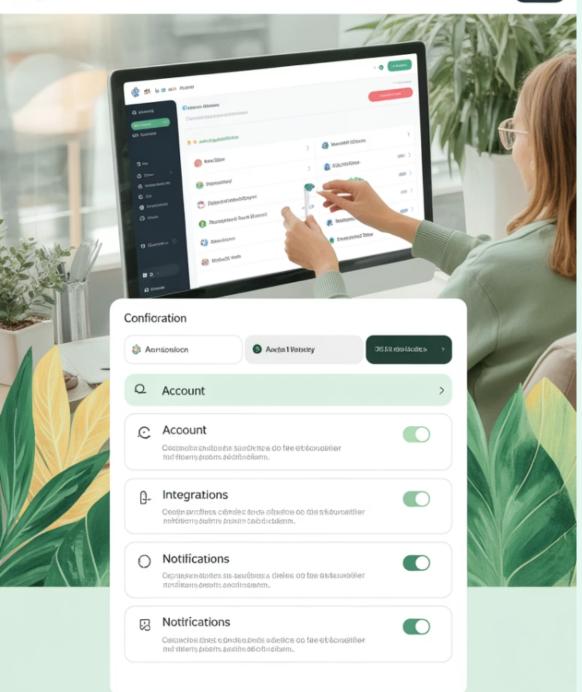


# Program Settings - Program Setup

This presentation covers the various program settings and setup options available in extendedReach. We'll explore activity shortcuts, appointment defaults, program setup options, and customization features to help you configure your programs to meet your agency's specific needs.



Fricing Docs Support Login



#### Terms of Service

Privacy Policy

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# Introduction



## Program Configuration

Each program is uniquely configured to meet your agency's needs. You can locate additional settings to disable or enable under Program Settings.

## **Getting Started**

Select the program you want to apply the changes to, then click on Edit to get started.

Many of the settings will be available under the Setup tab.

## New Program Setup

Please note that the following information is to modify existing programs. If you wish to set up a new program, please contact <a href="mailto:sales@extendedreach.com">sales@extendedreach.com</a>.

Activity Shortcuts		
Activity biloricats		
Shortcut #1:	Phone Contact - Client	•
Icon #1:	phone.gif	•
Shortcut #2:	E-Mail	•
Icon #2:	contact.gif	•

# Activity Shortcuts





Shortcut #1

Select the first activity type to be readily accessible on your workspace



Shortcut #2

Select the second activity type to be readily accessible on your workspace



Icon #1

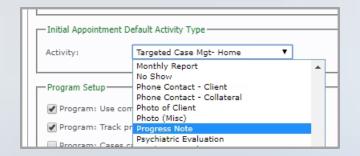
Choose the image that will be associated with the first shortcut



Icon #2

Choose the image that will be associated with the second shortcut

Activity shortcuts allow for two activities to be readily accessible on your workspace.



# Initial Appointment Default Activity Type

## Select Default Activity

When an appointment is created, you can have a specific activity default as the activity type. Select the activity from the activity drop-down.

#### Add New Activities

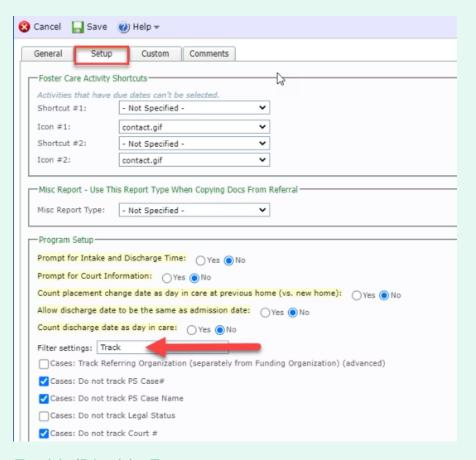
If you would like to add an activity to this list, go to Program Settings > Program Activity Types to create a new activity.

## **Apply Settings**

Save your changes to ensure the default activity type is applied to all new appointments in this program.

# Program Setup





#### Enable/Disable Features

The Program Setup section is where you can enable or disable features for a particular program. Place a checkmark next to the settings you wish to enable and click on Save.

You can enter a keyword into the Filter settings box to display a list of related settings. See the screenshot of the Program Settings. Notice how the settings below the Filter Settings block all contain the work "track" in them because the user entered "track" into the Filter Settings block.

#### Available Settings

Below is a description of the settings available. Please note that the "Financial", "Insurance", and "Authorization" settings may be unavailable for your agency as they require the <a href="Enterprise">Enterprise</a>
<a href="Financials">Financials</a>. If you are interested in using Enterprise Financials, please contact <a href="Sales@extendedreach.com">Sales@extendedreach.com</a>.

Settings include options for compliance checklists, tracking program categories, admission types, discharge types, worker assignments, custom labels, and many more configuration options.

# Setup



Setup —	
Checklist Categories (Column 1):	Intake Discharge
Checklist Categories (Column 2):	Counseling Treatment Casework
Worker Label:	Social Worker
Sec. Worker Label:	Therapist
Admission Types:	Routine Emergency
Relationships (Other Cases):	Neighbor Friend Second Cousin
Treatment Tab Label:	Treatment
Treatment Goal Categories:	Behavioral/Emotional/Psychologic al Educational/Vocational Health Safety Community Involvement

Drop-down Lists

Add or remove drop-down list items

Field Labels

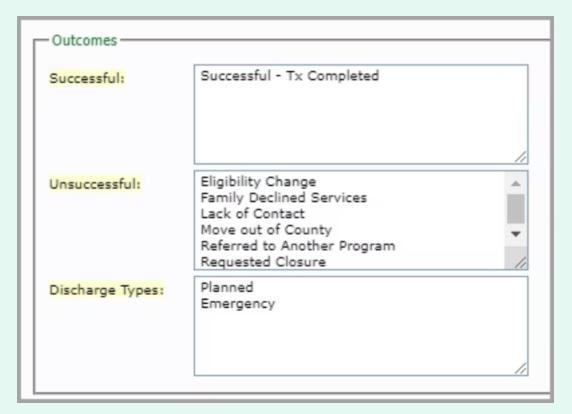
Change the label of certain fields within extendedReach

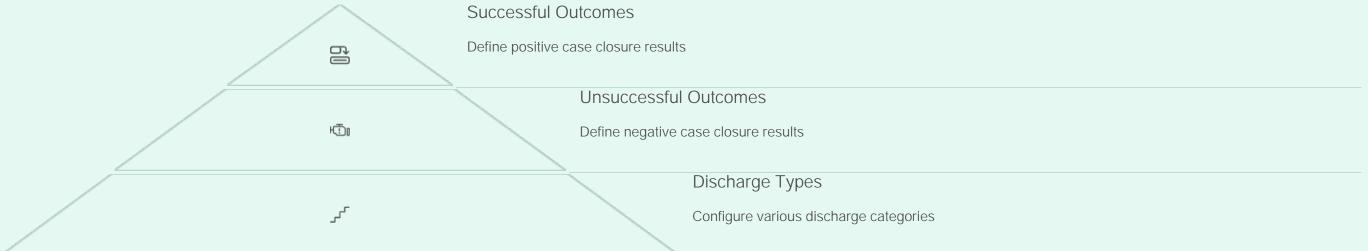
Categories

Compliance Checklist

## Outcomes







Outcomes are selected when a case is closed/discharged. Here you can add the list of successful outcomes or unsuccessful outcomes as well as discharge types. To track the discharge types, the setting "Program: Track discharge types" must be enabled.

Ref. Reasons:	Abandonment Failure to Protect Improper Supervision Other Extenuating Circumstances	4
	In Need of Therapy Services Medical Neglect	
Ref. Sources:	County	
Ref. Services:	Outpatient	
Ref. Rej. Reasons:	Change in Insurance Eligibility	
	Client AWOL Family Declined Services Ineligible for Services - Age Moved Out of Service Area No Response From Family	,

# Referrals





#### Referral Reasons

Modify the list of reasons why clients are referred to your program



#### Referral Sources

Configure the list of organizations or individuals who refer clients



#### Referral Services

Define the types of services clients can be referred for



## Rejection Reasons

Specify reasons why referrals might be rejected

If your agency is tracking referrals, you can modify selections for the referral reasons, sources, services, and reasons the referral was rejected. If these options are not available and you would like to start tracking referrals, go to System Settings > System Configuration > disable the setting "Referrals: Don't track referrals".

# Required Case Fields



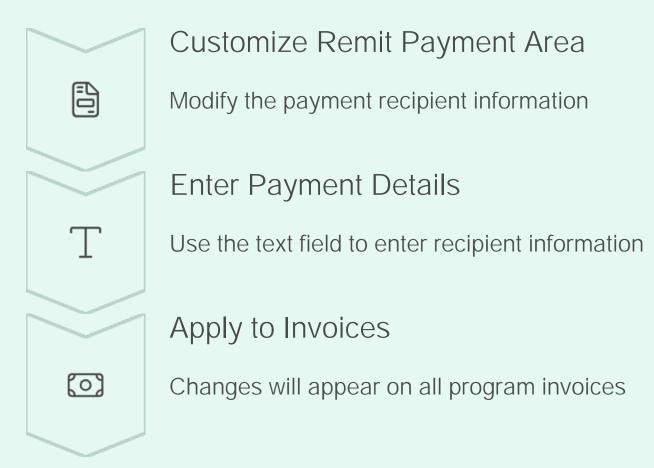
Required Case Fields			
Gender	Family Size		
✓ Date of Birth	Houshold Income		
Education Level	Address Street		
Occupation	City		
Employer	County		
Employment	State		
Primary Language	Zip		
Race	Phone: Fax		
Religion	Phone: Home		
<b>✓</b> SSN	Phone: Mobile Phone		
Marital Status	Phone: Work		
Marriage Date	E-mail		
	Mark Required Fields		
$\checkmark$	Select which fields must be comple	atod	
	Select Which helds must be comple	steu	
	J	Case Editing	
т	т		
F	1	Staff must complete all required field	S
			Data Validation
	Q		Ensures complete case information
	,		

The fields in this section can be marked as required. When a staff member is editing the case, they would be required to fill in the fields that are marked with a check mark.

- Invoice Customization	
- Invoice Customization	
Remit To:	
Nemic 101	

# **Invoice Customization**



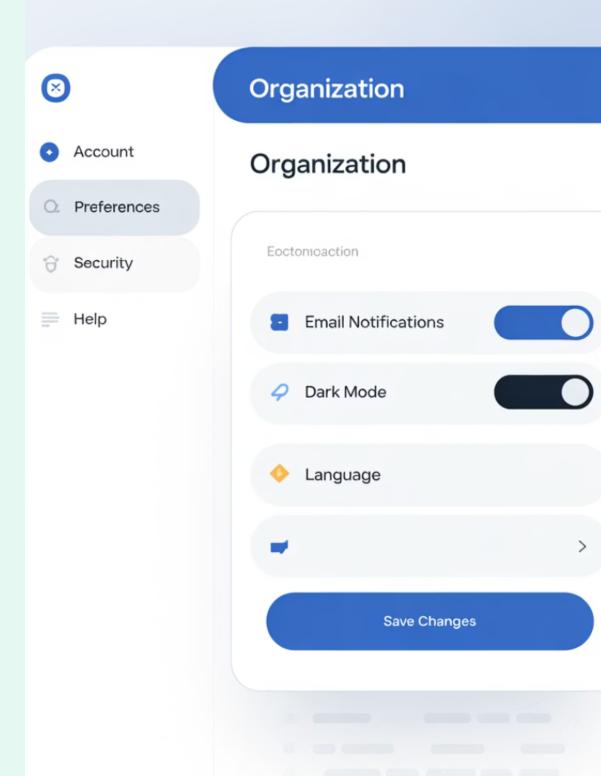


Invoices can have their "remit payment to" area modified. Use the text field to enter in the name of the individual or organization for payment to be remitted to.

# Organization Preferences - Settings

This presentation provides details on the Settings Tab in Organizational Preferences, which serves as the configuration control center for your agency's extendedReach system. You'll learn how to assign custom options that affect how your agency works with eR.









# Introduction

## Purpose

This article is meant to provide you with details on the Settings Tab in Organizational Preferences. Organizational Preferences is the configuration control center for your agency's extendedReach system.

## Function

The Settings Tab is where you will assign custom options that will affect how your agency will work with eR.

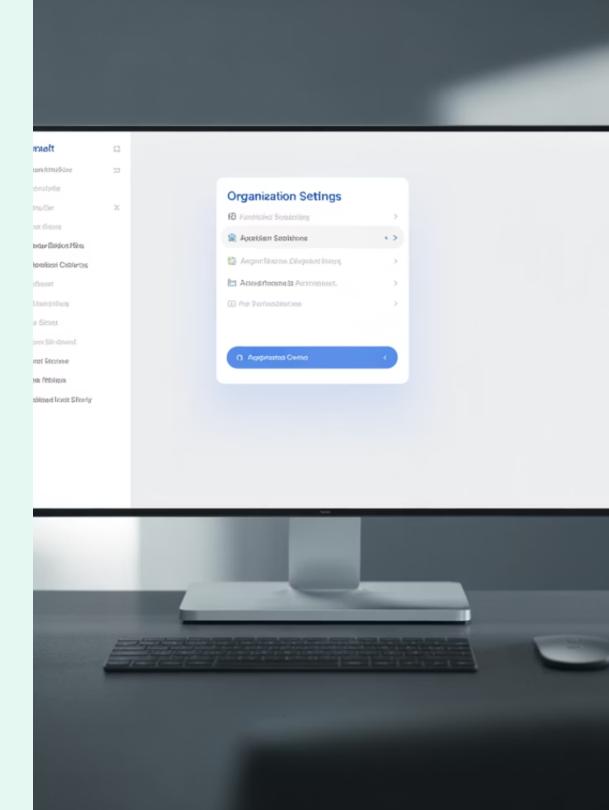
# Prerequisites

#### Administrator Access

You must be an Agency Administrator to access the "Administration" menu on the left side of your Workspace.

## Navigation

Hover over Organization Settings and click on "Organizational Preferences".



# Overview



## Configuration Hub

The Organizational Preferences screen serves as your central configuration hub



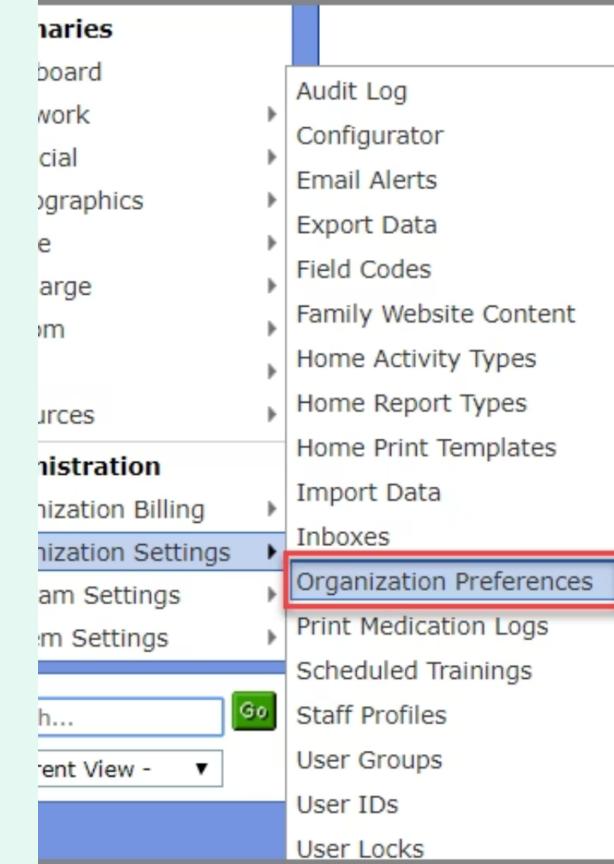
## Multiple Settings

Contains various tabs for different aspects of system configuration



## Agency-Wide Impact

Changes made here affect all users in your agency



# General Settings

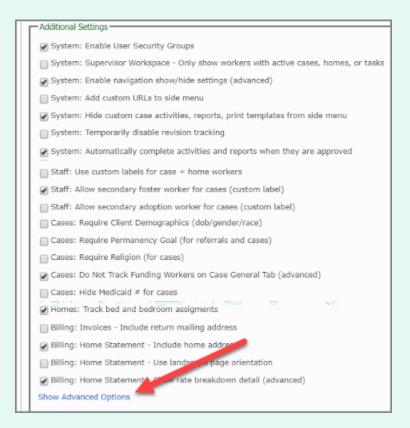


General Se	ettings Keywords Financials Custom Comments
General	
	lly assign case #'s
Next Number	
_	lly assign customer #'s
✓ Keep cu	stomer # the same as case #
✓ Automatica	lly assign home #'s; next number: 1002 home # prefix: H
Keep same	case # on readmission
Manage fos	ter home inquiries
Place all ne	w admissions at:
Placement	t type:
Automatica	lly create due activities and reports at intake
Do not allo	w entry of activities before:
Restrict pla	cement and rate changes to administrators only before:
Skip proof	on activities and reports
Default File Ma	nager: eR Plugin
Default Downlo	pad Folder: System Temporary
Default Progra	m for Referrals: Austin Area Foster Care
Do not requ	ire license numbers on foster homes licenses
Clean up du	ue documents on closed cases and homes that are more than 3 🔻 months past due.
✓ Automatica	Ily logout after 5 v minutes of inactivity

Setting	Description
Automatically assign case #'s	New cases added to the system will automatically be assigned a case number - here you can see what the next
	case number will be as well as change the prefix of the number.
Automatically assign customer #'s	Option to assign customer numbers from a different "counter" than the case number counter. (or just keep
	customers the same as case #) (or just leave customer #'s left blank) (or just hide customer #'s)
Automatically assign home #'s	New homes added to the system will automatically be assigned a home number - here you can see what the
	next home number will be as well as change the prefix of the number.
Keep same case # on readmission	If a case is closed and then re-admitted, it will keep the original case number.

# Additional Settings





#### Accessing Advanced Options

Scroll down to the bottom and click on "Show Advanced Options" to see all available settings or you can type a keyword into the Filter settings box at the top to display a list of related settings.

The best way to search for a desired setting in this section is to open up the Advanced Options and use CTRL + F to search for a specific keyword.

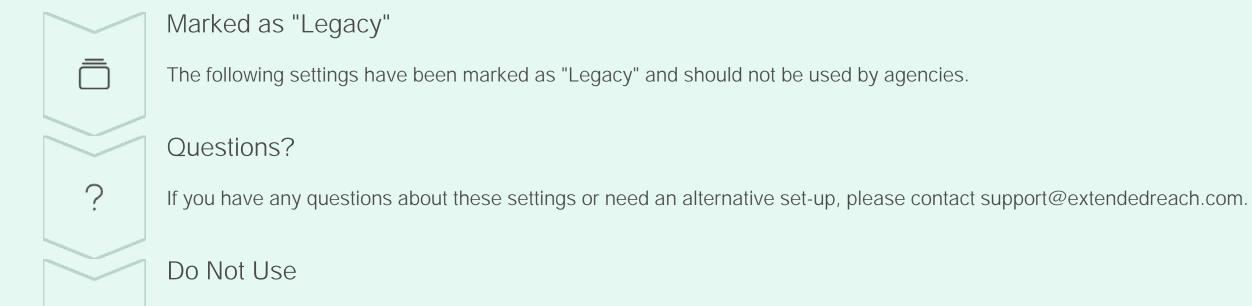
#### Categories of Settings

- System settings
- Staff settings
- Services settings
- Relationship settings
- Referral settings
- Medical settings
- Home settings
- Case settings
- Billing settings



# Legacy Settings

 $\bigcirc$ 



Settings like "Only allow agency administrators to edit activities marked as exported" and "Use DYMO LabelWriter for Home Addresses" are no longer supported.

# Advanced Password Options



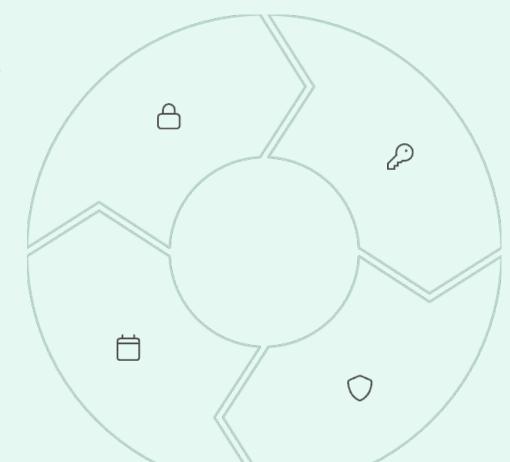
-	Advanced Password Options
-	
	Minimum password length: 8 v characters
	Require a password change every 1 vmonths
	At least one lowercase and one uppercase letter
	At least one number
	At least one special character !@#\$%^&*()_+~=\`{}[]:";'<>?,,/;
	No three duplicate characters in a row (e.g. 'AAA')
	No three consecutive numbers or letters in a row (e.g. '123')
	Can't contain first name or last name
Į.	

### Enable Advanced Options

When the setting "System: Use advanced password options" is enabled the section Advance Password Options will displayed and can be configured.

#### Password Expiration

Require password changes every 1-12 months based on your security policies.



#### Character Requirements

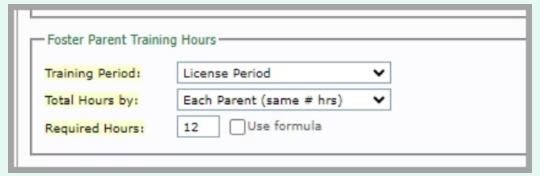
Set requirements for lowercase, uppercase, numbers, and special characters in passwords.

#### Security Rules

Prevent use of names, consecutive numbers/letters, or duplicate characters in passwords.

# Foster Parent Training Hours







# **Custom Labels**



## Field Customization



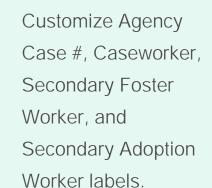
Home Labels



Case Labels

Allow for labels to be customized to match titles/labels used by the agency/organization.

Customize Agency Home #, Home Worker, and Secondary Home Worker labels.





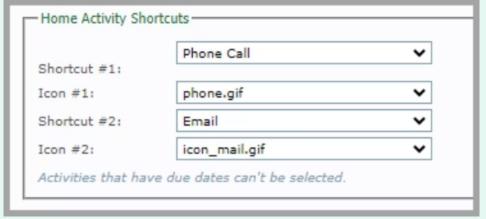
### **Header Text**

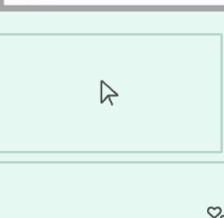
Customize the agency name displayed in the workspace header.

Agency Case #:	Agency Case #	
Customer #:	Customer #	
Agency Home #:	Agency Home #	
Vendor #:	Vendor #	
Caseworker :	Case Specialist	
Home Worker:	Licensing Specialist	
Secondary Foster Worker:	Sec. Case Specialist	
Sec. Home Wkr:	Sec. Licensing Specialist	
Teacher/Contact:		
Special Ed:		
Header Text:	Avengers Agency	

# Home Activity Shortcuts

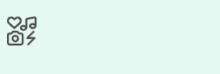






#### Select Activities

Choose two home activities to create quick access from the User's workspace screen



#### Choose Icons

Select icons to designate the specific home activities for quick access



## Improve Efficiency

Provide users with one-click access to frequently used home activities





# Understanding the Auditor Role in extendedReach

The Auditor Role in extendedReach provides secure, read-only access to case files, home records, and staff profiles for external reviewers and auditors. This functionality allows organizations to grant temporary access to specific information while maintaining appropriate security and confidentiality controls. This presentation walks through the setup process, functionality, and best practices for implementing the Auditor Role in your extendedReach system.



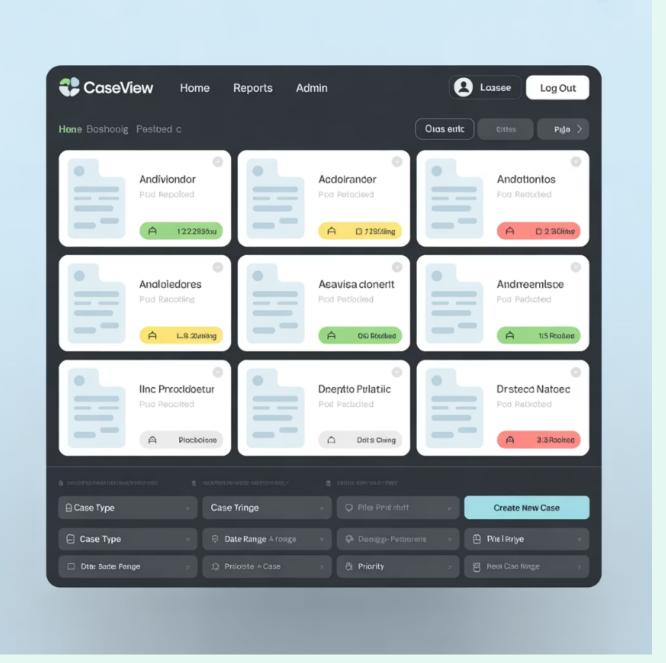
# **Auditor Role Overview**



#### What Auditors Can Access

- Case files (activities, reports, documents)
- Home records (compliance documentation)
- Staff profiles (training records)

All access is read-only and can be customized based on specific audit requirements. Organizations maintain complete control over which records auditors can view.



The auditor interface provides a streamlined view with basic information about each record and filtering capabilities to quickly locate specific documents.

# Prerequisites for Implementation



## Foster Care/Residential System

The Auditor Role feature is exclusively available in Foster Care/Residential systems and is not currently supported in General Case Management.



#### **Full Administrator Permissions**

Setting up the Auditor Role requires an extendedReach User ID with Full Administrator permissions to enable the feature and create auditor accounts.



## Manage Auditor Access Permission

Staff who will be granting and removing auditor access to specific records must have the "Manage Auditor Access" permission enabled on their user profile.

# Enabling the Auditor Role

## Access Organization Preferences

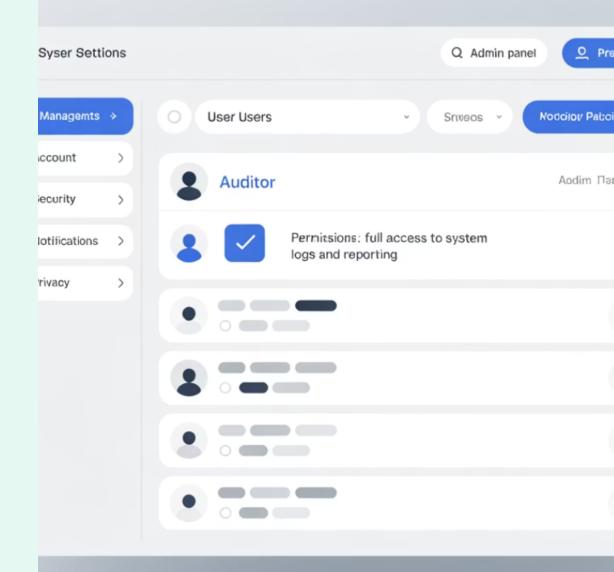
Navigate to Side Menu  $\rightarrow$  System Administration  $\rightarrow$  Organization Settings  $\rightarrow$  Organization Preferences to access system configuration settings.

## Navigate to Settings Tab

Click on the "Settings" tab within Organization Preferences to find security and access-related options.

#### **Enable Auditor Role**

Locate the "Enable Auditor Role" checkbox and select it to activate this functionality. Click "Save" to apply the changes to your system.



# Creating an Auditor User ID



Add New User

Navigate to Side Menu  $\rightarrow$  System Administration  $\rightarrow$  User Management  $\rightarrow$  User IDs and click "Add" to create a new user account.



Select Auditor Security Level

Choose "Auditor" from the Security Level dropdown menu. This automatically assigns appropriate permissions.



Configure Auditor Options

Decide whether to enable "Show Confidential Information" and "Show Health Information" based on audit requirements.



Save and Create Password

Complete the user creation process by saving the profile and setting up initial login credentials for the auditor.

# **Enabling Manage Auditor Access**

#### **Grant Permission to Staff**

Navigate to the User ID for any staff member who will be responsible for granting auditor access to records.

## Access Permission Settings

Click "Edit" on the user profile and locate the "Manage Auditor Access" permission under the appropriate section.

#### **Enable and Save**

Check the box next to "Manage Auditor Access" and click "Save" to update the user's permissions.

Staff members with this permission will see an "Auditor Access" button on the top menu when viewing cases, homes, or staff profiles, allowing them to grant access to auditors.

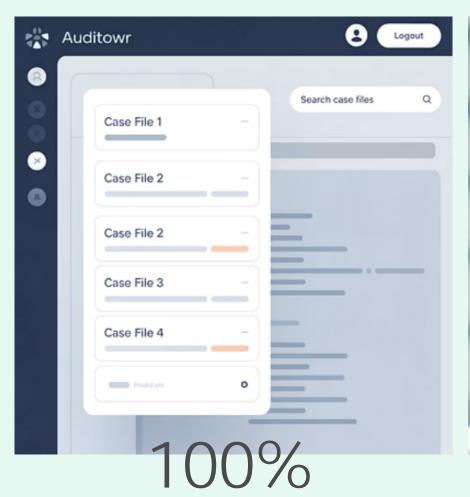


# **Granting Auditor Access**



# Auditor Experience and Best Practices









Read-Only Access

Ensures data integrity by preventing any modifications to records

Day Limit

Maximum recommended access duration for standard audits

Steps to Remove

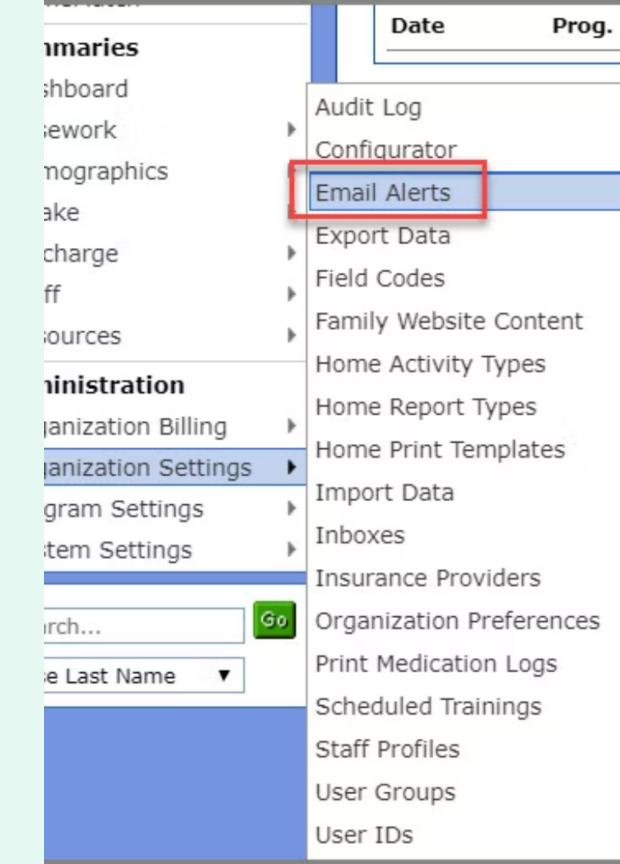
Quick process to revoke access when audit is complete

# Understanding Email Alerts in extendedReach

Email Alerts are a powerful feature within extendedReach that enable automated communication about critical events in your case and home management workflows. These pre-planned email messages announce either "Action-Based" events (such as approvals) or "Scheduled" events (like birthdays or court dates), ensuring that key stakeholders remain informed about important developments within your organization.

With proper configuration, these alerts help maintain timely communication across your team and external partners, reducing manual follow-up and improving overall efficiency in your organization's operations.

by Emily Parks



# Administrator Access and Security Requirements



## Required Permissions

You must have Agency
Administrator privileges to access
the Email Alerts configuration
section. This restriction ensures that
only authorized personnel can
create or modify organization-wide
notifications.

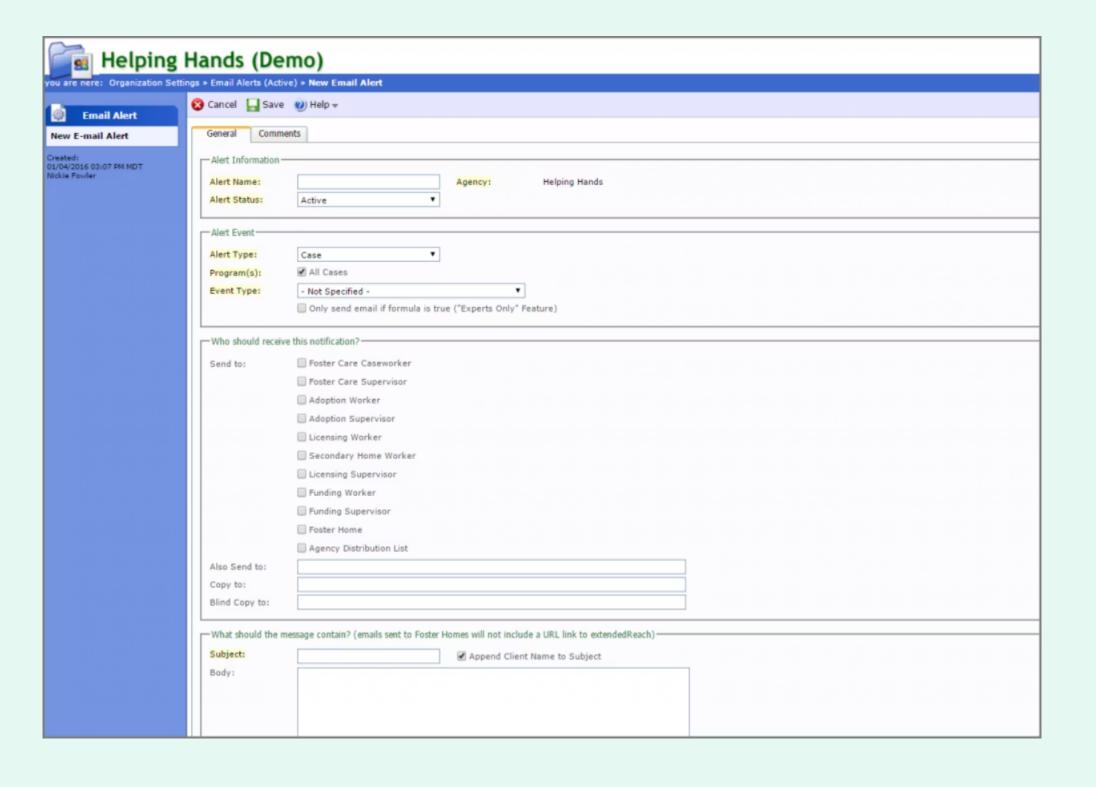
## Navigation Path

From your Workspace, locate
"Administration" on the left side
menu, then select "Organization
Settings" and click on "Email Alerts"
to access the configuration area.

## Security Considerations

Email alerts contain potentially sensitive information about cases and homes. Make sure to review your organization's data privacy policies when determining who should receive specific types of alerts.

Maintaining proper security controls for email alerts is essential, as these communications often contain confidential information about clients and organizational activities. Consider implementing regular audits of your email alert configurations to ensure they remain aligned with your current operational needs and security policies.





# Creating New Email Alerts



# Access the Email Alerts Section

Navigate to Administration >
Organization Settings >
Email Alerts and click on
"Add Email Alert" to begin
the configuration process.

# Configure General Information

Enter an Alert Name (which will auto-fill as the email subject), set the Alert Status to active, and select the appropriate Agency if you manage multiple organizations.

# Define Alert Event Parameters

Specify whether the alert is for a case or home, select applicable programs, and choose the Event Type that will trigger the notification (such as due dates, approvals, or specific milestones).

# Set Recipients and Message Content

Determine who receives the alert, customize the subject and body text, and decide whether to include a link to extendedReach in the notification before saving your configuration.

When creating alerts based on due dates or expiration dates, be precise with naming conventions. For due date alerts, list the exact Activity/Report Type name. For expiration date alerts, use the exact name and append "Expires" to the end to ensure proper system recognition.

# Recipient Configuration Options



### **Primary Recipients**

Select from role-based options including:

- Foster Care Caseworker
- Foster Care Supervisor
- Adoption Worker
- Adoption Supervisor
- Licensing Worker
- Licensing Supervisor
- Funding Worker
- Funding Supervisor

#### **Distribution Lists**

Leverage pre-configured distribution channels:

- Foster Home
- Agency Distribution List (configured in Organization Preferences)
- Branch Distribution List (configured in Branch Profiles)

These options allow for efficient communication to standardized groups without having to maintain individual email addresses.

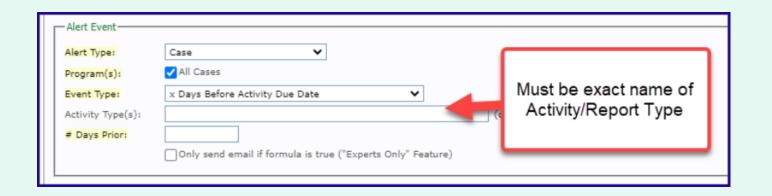
#### Additional Recipients

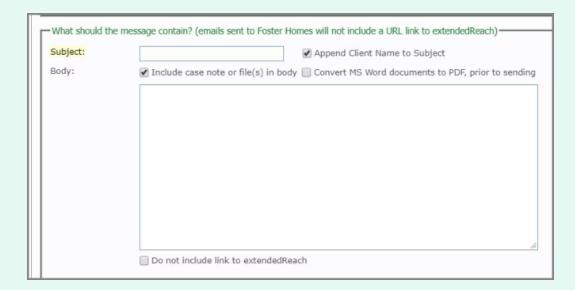
Extend your communication reach by using:

- "Also Send to" for additional direct recipients
- "Copy to" for carbon copy recipients
- "Blind Copy to" for confidential recipients

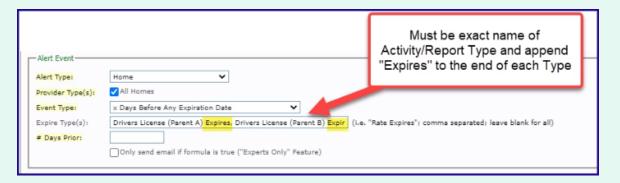
Multiple addresses can be included in each field by separating them with commas.

When setting up recipients, consider the nature of the information being shared and ensure compliance with your organization's confidentiality policies. External recipients should be informed that emails will arrive from alerts@extendedreach.com to prevent them from being filtered as spam.









Who should receiv	ve this notification?
Send to:	Foster Care Caseworker
	Foster Care Supervisor
	Adoption Worker
	Adoption Supervisor
	Licensing Worker
	Licensing Supervisor
	Funding Worker
	Funding Supervisor
	☐ Foster Home
	Agency Distribution List
	Branch Distribution List
Uso Send to:	
Copy to:	
Blind Copy to:	



# Message Content Customization



## Subject Line

The email subject is automatically populated from the Alert Name but can be customized to better reflect the notification's purpose.



#### Client Name

Enable the "Append Client Name to Subject" option to automatically add the relevant client's name to the email subject for easy identification.



## **Body Content**

Add detailed information and instructions in the email body to provide context and action items for recipients.



## System Link

Control whether to include a direct link to extendedReach in the email by toggling the "Do not include link to extendedReach" option.

Creating effective email content is crucial for driving appropriate action. Use clear, concise language and include specific details about what action is needed, who needs to take it, and by when. Consider including placeholders that will automatically populate with relevant case information when the alert is triggered.

# Special Considerations for Different Event Types

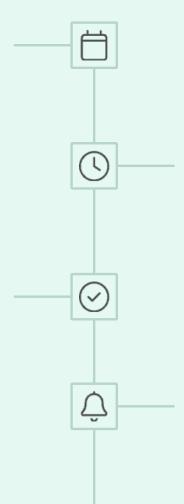


#### Due Date Alerts

When configuring alerts based on "x Days After Activity is Late", "x Days After Report is Late", "x Days Before Activity Due Date", or "x Days Before Report Due Date", you must specify the exact name of the Activity/Report Type for proper system recognition.

#### Approval Workflow Alerts

When creating alerts for approval processes, consider setting up notifications for both submission and completion to keep all stakeholders informed throughout the workflow.



## **Expiration Date Alerts**

For alerts triggered by "x Days Before Any Expiration Date", list the exact name of the Report/Activity and append the word "Expires" to ensure the system correctly identifies the expiration event.

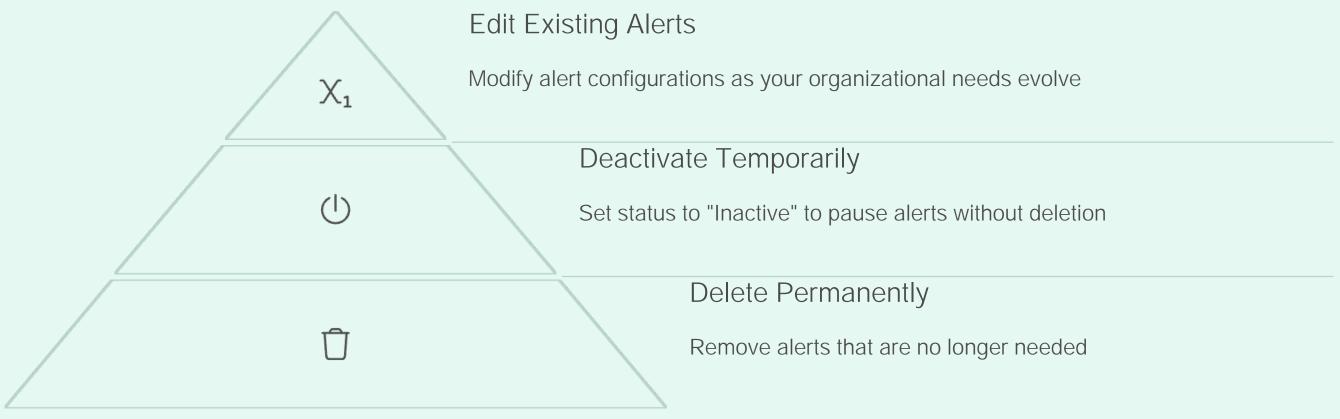
#### Scheduled Event Alerts

For birthdays, court dates, and other calendar-based events, determine the optimal timing for notifications to ensure adequate preparation time for the relevant parties.

The timing of your alerts can significantly impact their effectiveness. Consider creating a sequence of alerts for critical deadlines, with initial reminders sent well in advance and follow-up notifications as the deadline approaches.

# Managing Existing Email Alerts





To modify an existing alert, navigate to the Email Alerts section, click on the blue hyperlinked Alert Title, then select "Edit" to make changes or "Delete" to remove the alert entirely. If you want to temporarily disable an alert while preserving its configuration for future use, change the "Alert Status" to "Inactive" instead of deleting it.

Regular audits of your email alert configurations can help ensure they remain relevant and effective. Consider reviewing all alerts quarterly to confirm they still align with your organization's workflows and communication needs.

# Best Practices and Troubleshooting





#### **Test New Alerts**

After creating a new alert, perform a test action that should trigger the notification to verify it works as expected before relying on it for operational purposes.



### Inform Recipients

Let external recipients know that emails will come from alerts@extendedreach.com and advise them to add this address to their safe senders list to prevent notifications from being filtered as spam.



## Avoid Alert Fatigue

Be strategic about which events trigger alerts and who receives them to prevent overwhelming staff with too many notifications, which can lead to important alerts being overlooked.



### Regular Maintenance

Schedule periodic reviews of your alert configurations to remove outdated alerts, update recipient lists as staff changes occur, and ensure alerts remain aligned with current workflows.

If alerts are not being received as expected, first verify the alert is set to "Active" status. Next, check that the event criteria are correctly configured and that recipient email addresses are accurate. For role-based recipients, confirm that the appropriate staff members are correctly assigned to those roles within the system.

Consider creating a documentation reference that outlines all configured alerts, their purposes, and their recipients to maintain organizational knowledge about your notification strategy.



# Pro Tip

Create a rule, folder, or label in your email to push all email alerts from extendedReach to a special folder. This will help you see and find the alerts without having to go through your email.

- <a href="https://support.microsoft.com/en-us/office/create-a-folder-or-subfolder-in-outlook-3d3120d4-3c0e-4fef-b396-89b68324eba6">https://support.microsoft.com/en-us/office/create-a-folder-or-subfolder-in-outlook-3d3120d4-3c0e-4fef-b396-89b68324eba6</a>
- Create a rule to push all emails from alerts@extendedreach.com to your extendedReach Email Alerts Folder, or use Label:
   https://support.microsoft.com/en-us/office/manage-email-messages-by-using-rules-in-outlook-c24f5dea-9465-4df4-ad17-a50704d66c59