ECRS Guidance 2014-01 – Tracking Data in the Oversight IDF
(Effective 02/03/2014)

In order to produce accurate reports from Therap to replace the monthly reports for

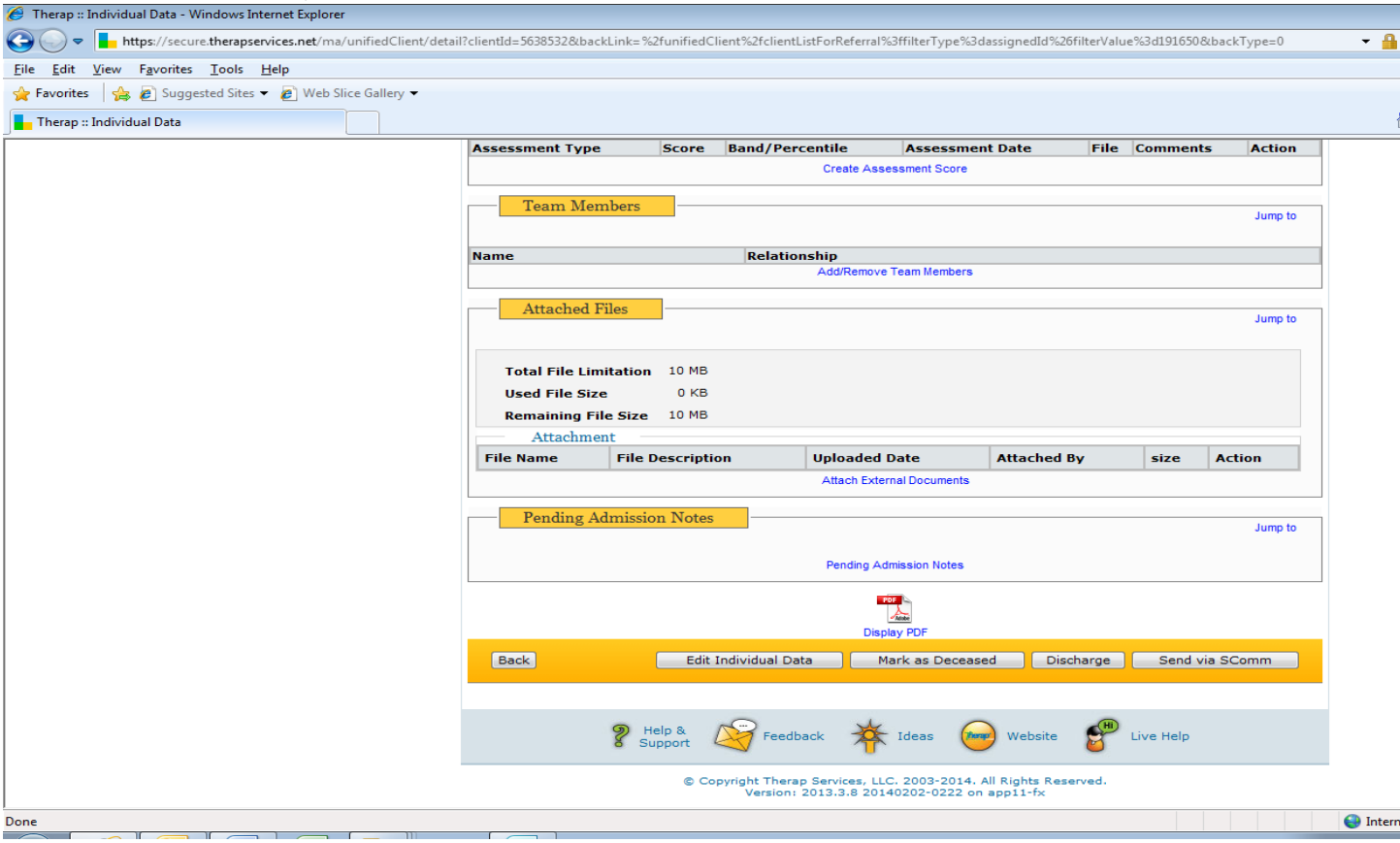
- Residential Listing Report
- Case Load Report

It is important that the information is kept current in the Individual's Oversight IDF. Attempts have been made to at least have basic demographic information captured in the system. We are approximately 80% complete with this process. Your assistance to review and correct any misinformation will be very beneficial.

To start, review the most current report for your regional office. The report has individuals alphabetized within a location based on the sort by street address.

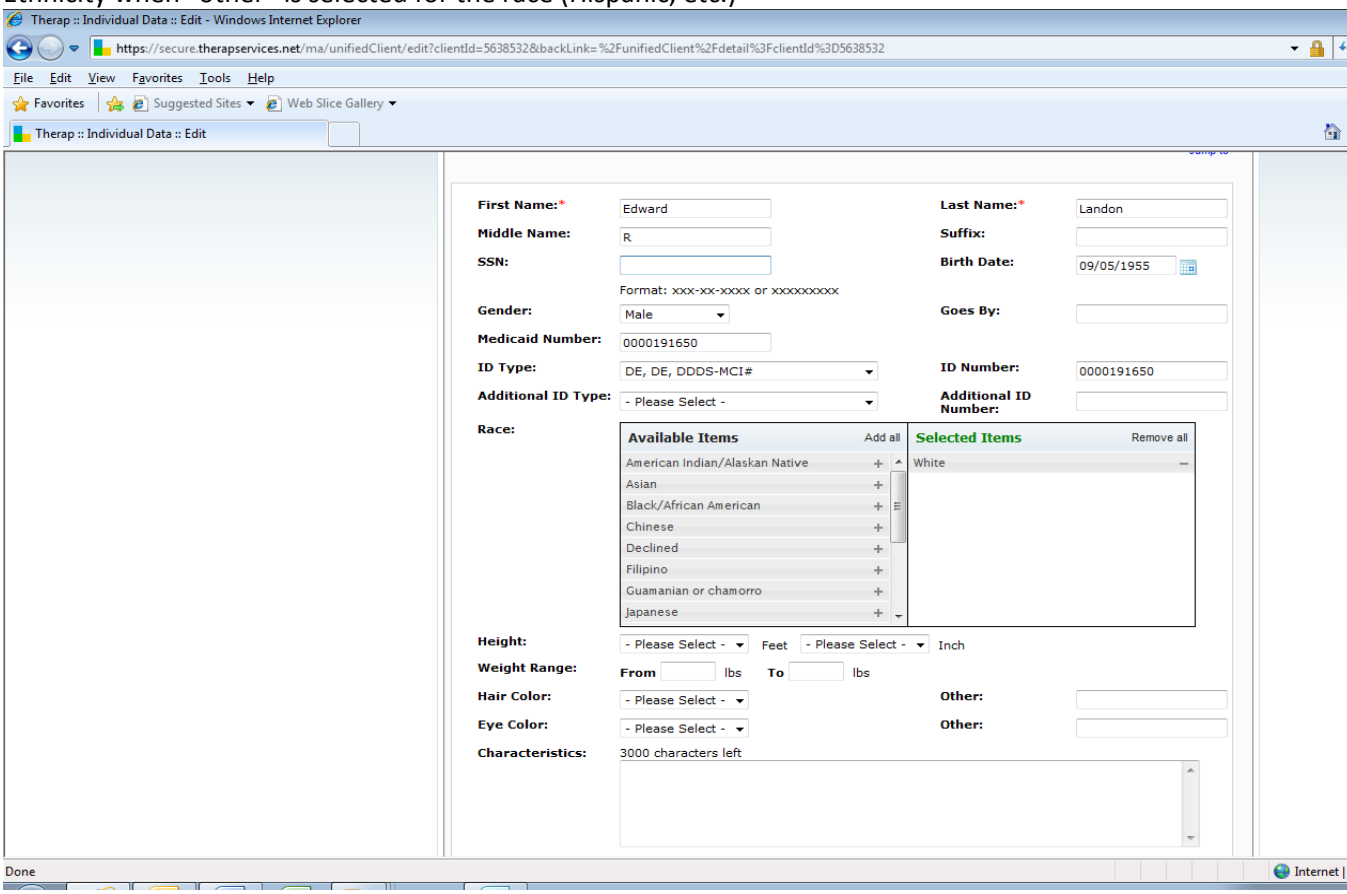
To update or correct information you will first need to search for the individual's IDF in the oversight account.
Following standards of data entry will also help with producing valuable reports.

1. Click on the individual's name in blue. Once the IDF displays;
2. Press your end key or scroll to the bottom of the IDF;
3. Select Edit Individual Data;



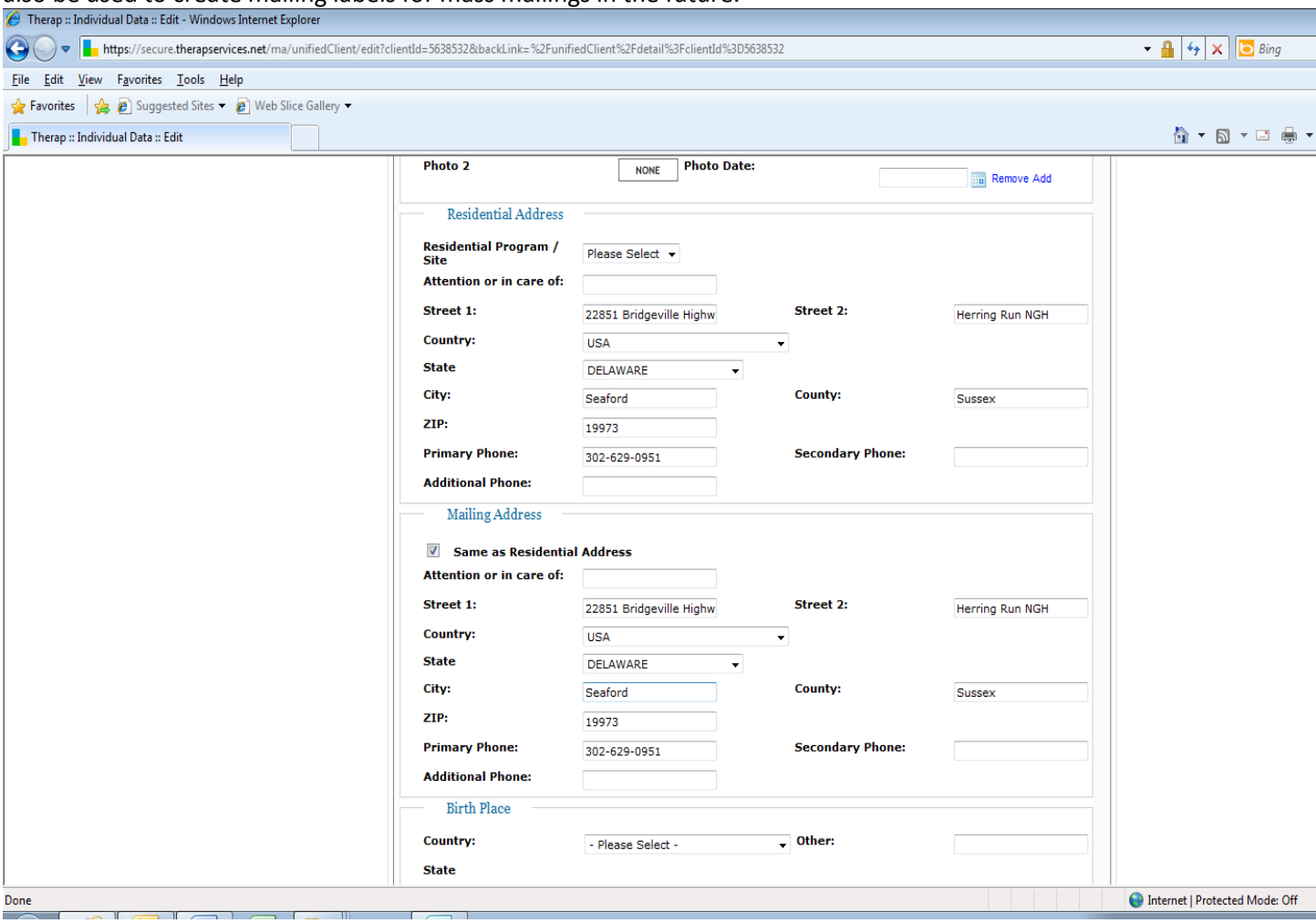
4. We are looking to make sure that the following fields are completed at a minimum.
    a. SSN if known
    b. Birth date
    c. Medicaid Number (10 digits to include leading zeroes)
    d. Race

e. Ethnicity when “other” is selected for the race (Hispanic, etc.)



5. Standard data entry guidelines
    a. Any “In Care Of” notations should be captured in the field prior to the street address 1 in the residential portion of the IDF.
    b. Street addresses should be spelled out with the exception of North, South, East and West you can use the standard abbreviations. (S-South, N-North, E-East, W-West)
    c. Apartment numbers should be in “Street 1” separated from the street address by a comma. (Ex – 43 W Third Street, Apt 3)
    d. “Street 2” for NH and CLA should be the name of the site. We will be compiling a list/report of all locations within the state so that you can refer to it for consistent entry.
    e. County, this is the county of the regional office supporting the individual and not necessarily the county of which the city is located. This is important to enter the regional office in this field so that reports can be sorted by regional office. (For Example Kent County is supporting an individual in the city of New Castle, the county would be “Kent”.)
    f. Phone numbers should be listed in the format (302-555-5555)
6. If the mailing address and information is identical, check the box “Same as Residential” in the Mailing contact section. This will import the information for you so that duplicate entry is not required. This data section will

also be used to create mailing labels for mass mailings in the future.



7. If the mailing address is different, you would need to enter the mailing information in the field. It is not necessary to complete the phone number fields in this section as they would be shown in the Residential Address section.
8. Scroll to the bottom of the IDF and click save.

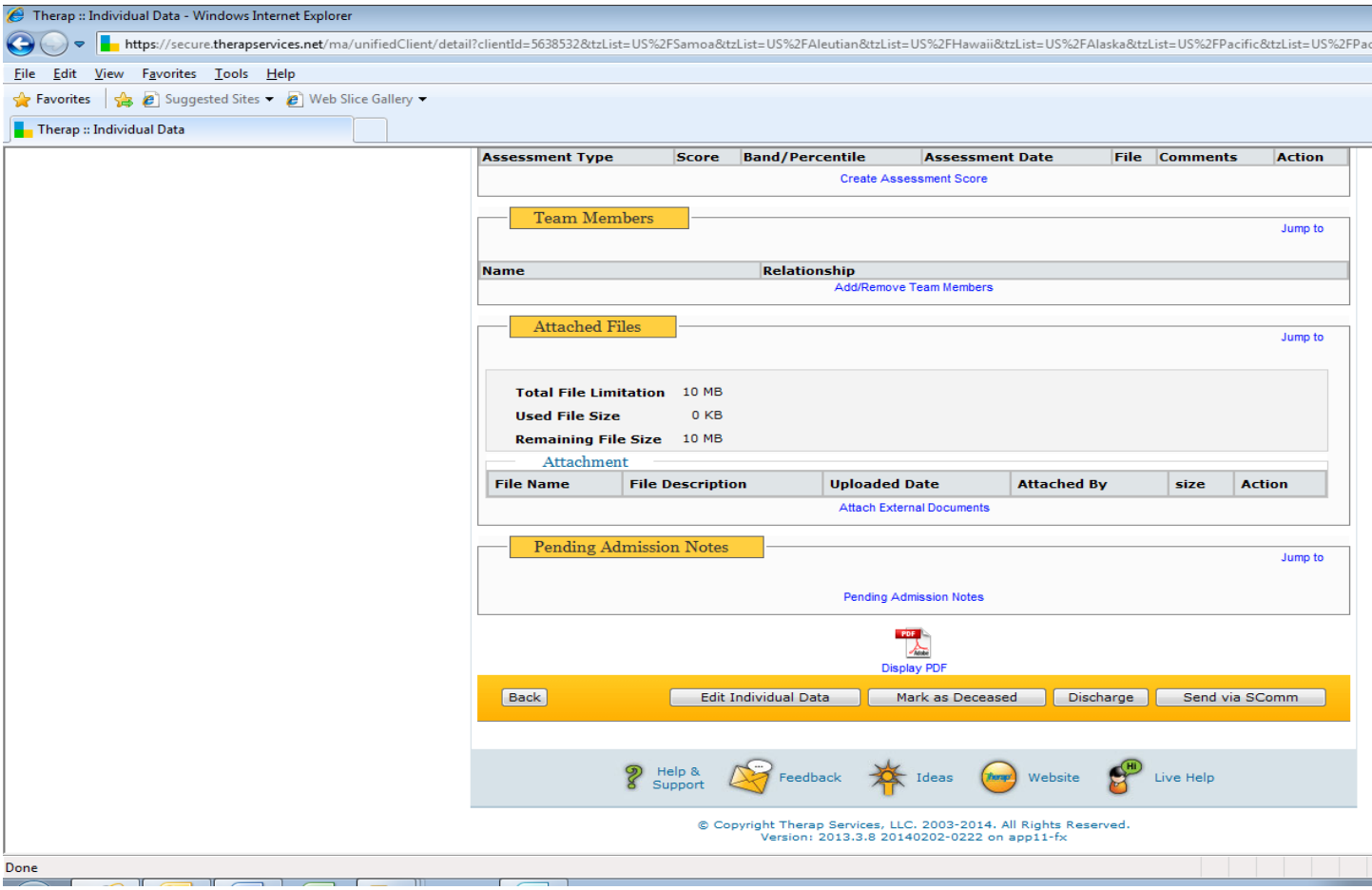
Tracking Team Members Data

This is a new requirement will aid in the replacement of the case load reports. In order to select Team Members in this section, the user must have the individual assigned to their case load. For example to change the case manager team member, the individual must be assigned to their case load in Therap prior to completing this section.

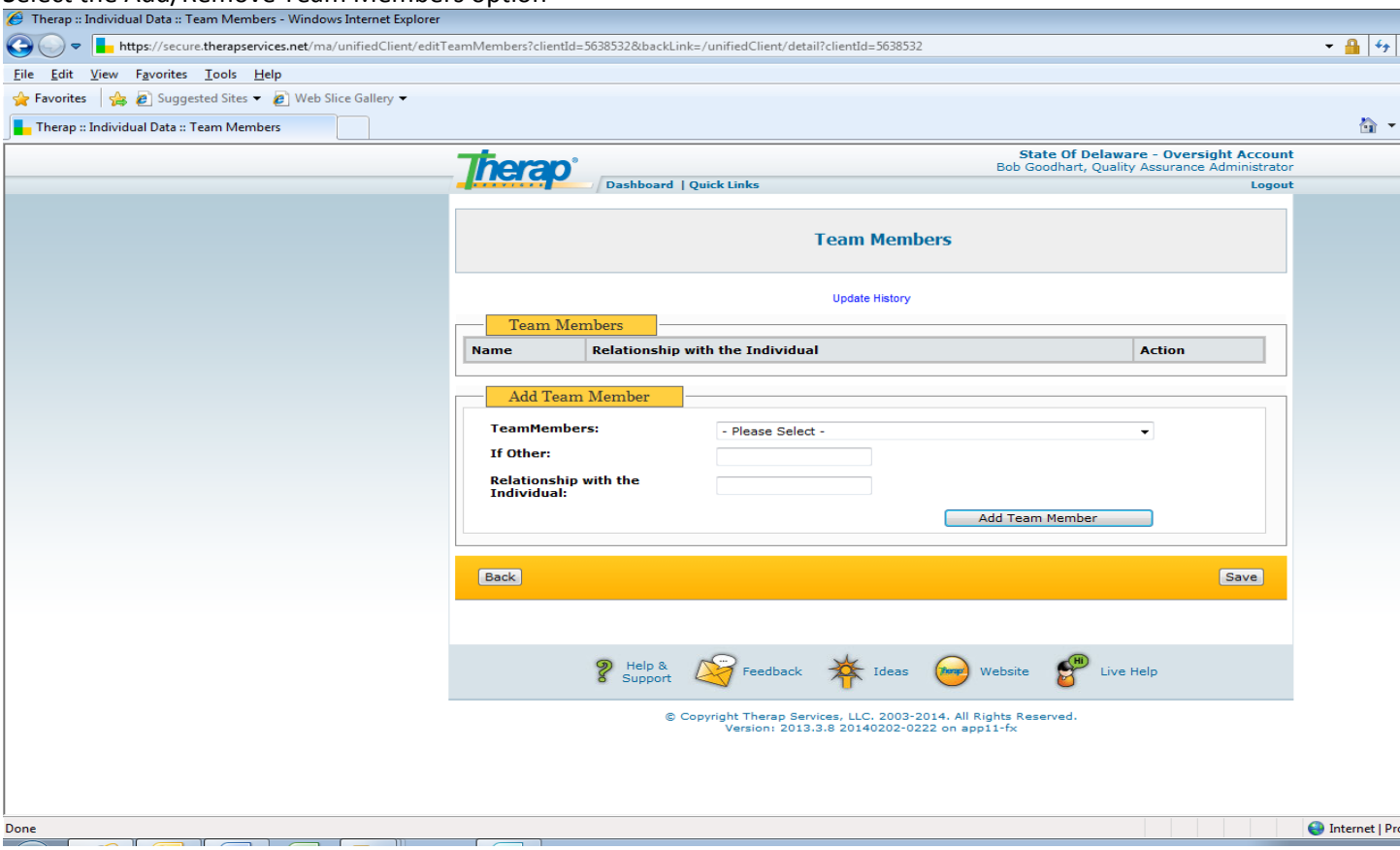
To begin

1. If you just updated other information on the IDF and selected save, you can select the “back” option when it appears. This will take you back to the updated IDF in regular mode. You would then scroll to the bottom of the IDF.

2. If you did not complete any updates then you would just scroll to the bottom of the IDF to the team member section.

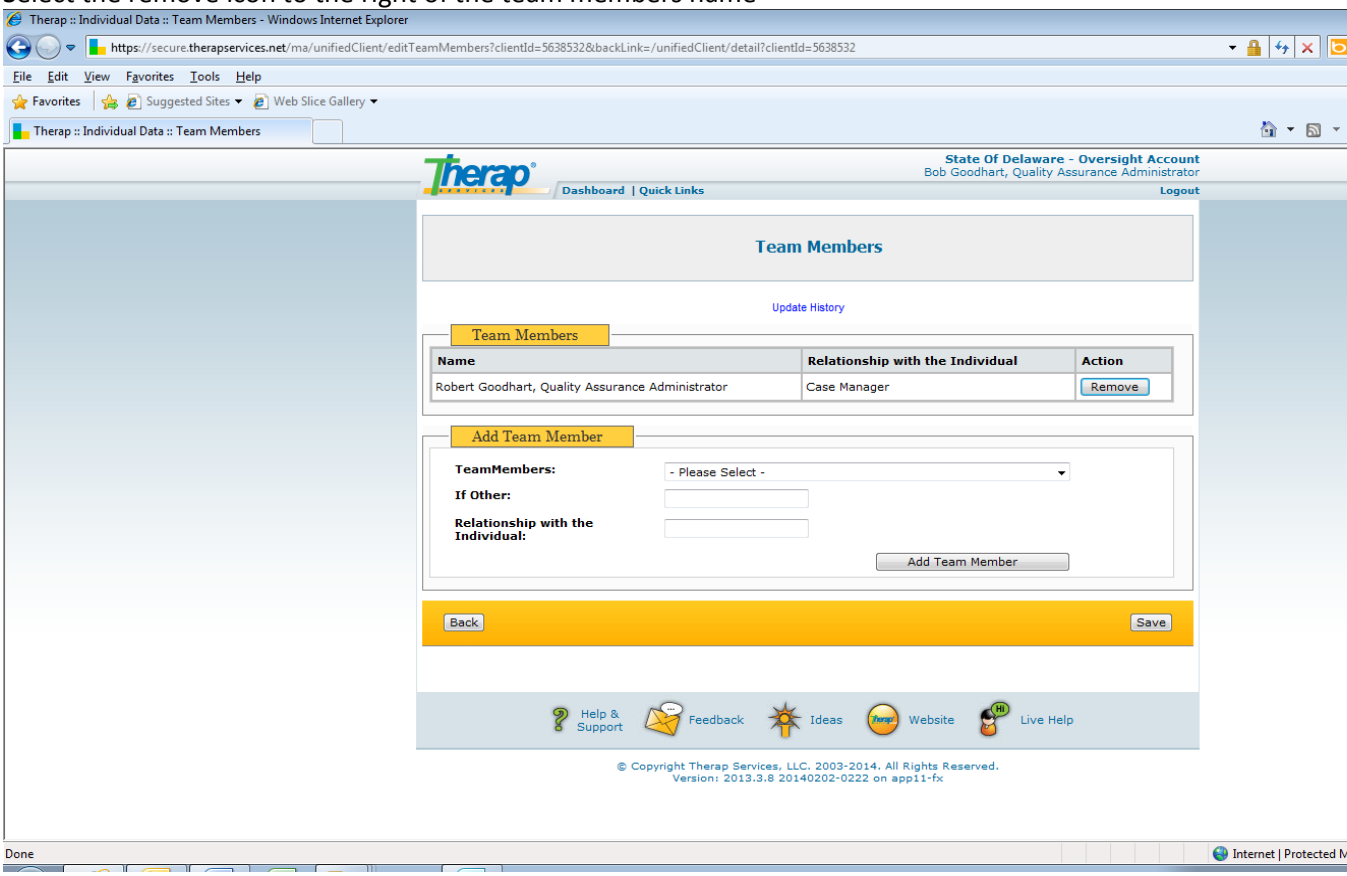


3. Select the Add/Remove Team Members option



4. Type the last name of the team member and select their name from the drop down field. (if the name doesn't appear, then this indicates that the individual has not yet been assigned to that users caseload) Team members from agency providers should also be displayed and selected for the appropriate clinical service.
5. Leave "If Other" blank for the current time.
6. Relationship with the individual: should be completed with one of the following options. Consistency in this field will help to produce a reliable report. (These are only used as a label that helps the system pull the name into the appropriate column in the report. It is not meant to be the actual title of the team member.)
    a. Case Manager
    b. Nurse
    c. Behavior Analyst
7. After each selection of a team member and their relationship field is completed, click on "Add Team Member".
8. To Remove a team member make sure that you are in the Add/Remove Team Member mode.

a. Select the remove icon to the right of the team members name



9. When all team member updates have been completed, select the save option.

If you need to update another individual's record, you will need to go back to the dashboard and begin again.

Your assistance with keeping this data current and accurate will lead to many benefits in producing valuable reports.