EON

EVALUATE OUTCOMES NOW

EON User Manual

iARCA

INSTITUTE FOR EXCELLENCE, INC.

EON User Manual

Introduction – EON in Salesforce

Welcome to EON – Evaluate Outcomes Now! EON is the outcomes database used by IARCA member agencies that participate in the IARCA Outcome Measures Project. As of January 1, 2023, EON is hosted on the Salesforce platform.

The IARCA Outcome Measures Project is a groundbreaking initiative to gather statewide data on the real-life impacts of Indiana's private child and family welfare services. Thank you for being part of such an important effort which helps IARCA advocate for legislative investments in Indiana's most vulnerable children, youth, and families!

Programs in EON

The following is a list of all thirteen program types available in EON, based on programs which IARCA member agencies provide. Each agency and its users will only have access to enter data into the program(s) which their agencies actually provide, as indicated to IARCA by the agency's administrators. For more detailed descriptions of what types of services each program provides, please contact IARCA outcomes staff.

- Crisis Stabilization
- Day Treatment
- Family Preservation Services
- Home-Based
- Older Youth Services
- Outpatient
- PRTF – Psychiatric Residential Treatment Facility
- Residential – Public Schools
- Residential – Public & On-Ground Schools
- Residential – Secure
- Shelter Care
- Traditional Foster Care
- Therapeutic Foster Care

Note: Each sections listed below is hyperlinked – click on the section title to be taken to it.

Table of Contents

Basic Concepts

There are four basic concepts within this EON system that are important to know:

- **Client/Family**: The majority of data entered into EON is done so for individual children/youth being served (called "clients"). This is true for all programs except for Family Preservation Services, for which data is entered for the entire referred family unit. Though many of the steps are similar, for users who work in Family Preservation, please be sure to refer to the Family Preservation Services section for instructions tailored to that program!
- **Intake Packet**: This packet of tools is to be completed within 30 days of the client/family's admission into your program.
- **Discharge Packet**: This packet of tools is to be completed within 30 days of the client/family's discharge from your program (for residential, this means when they are discharged from the facility into the aftercare program). In order for us to measure change from intake to discharge, the discharge packet must be "matched" to the correct intake packet from the client's placement in your program.
- **Follow Up Packets**: We ask that agencies attempt to contact clients to complete Follow Up Packets at either 3 and 6 months or 6 and 12 months after discharge, depending on the program. Not all agencies or programs within an agency participate in completing Follow Ups; check with your supervisor.

Log In to EON

Google Chrome is the required browser for using Salesforce. If you use a different browser (e.g. Microsoft Edge, Firefox), then EON may not function correctly!

The web address for EON is: outcomes.my.site.com/agencies

When a new user is created by IARCA or agency administrators, the user will automatically receive an email from the Salesforce system which includes their username (which is their work email address with ".eon" added to the end), a link to the site, and a button they need to click to "Verify" their account and create their unique password. This email will come from support@salesforce.com (users may need to check junk/spam/quarantine folders).

If the user uses the "Forgot your password?" link on the log-in page, or if an admin has to reset the user's password, they will receive an email from developer+iarca@radianhub.com with a link to set a new password (users may need to check junk/spam/quarantine folders).

All log-in related links in emails from Salesforce will expire after 24 hours!

Navigation

The purple bar across the top of the EON home page has quick access buttons that allow you to easily find what you need:

- **Home**: The EON home page shows a list of My Incomplete Packets (all incomplete packets assigned to you, other than Family Preservation) and, if applicable for you, a list of My Incomplete Family Pres Packets (all incomplete Family Preservation packets assigned to you). If you do not have any incomplete tools, the list will not display. You can access a packet which has incomplete tools by clicking on the Packet Number. Clicking on the Client Name will take you to that client's page, from which you can also access all of their packets. Below these lists, you will also see lists with all of your agency's incomplete packets – in case you need to complete one that is assigned to someone else.

  NOTE: The incomplete packet lists will only display up to 5 cases on the home page; click "View All" at the bottom of the list to see the entire list.

- **Clients**: This page defaults to displaying a list of all your clients in programs other than Family Preservation. If you click on a name, it takes you to that client's page, from which you can access all of their packets. If you need to see all your agency's clients, you can change the list filter by clicking the down arrow next to "My Clients" and choosing instead "All Agency Contacts".

  NOTE: The client list will only display up to 25 items on this page; click "View All" at the bottom of the list to see the entire list.

- **New Client**: As detailed below, click this button to create a new client for any program other than Family Preservation Services.
- **Families**: This page displays a list of all of your agency's Family Preservation Services families. If you click on a family's name, it takes you to that family's page, from which you can access all of their packets.
- **New Family Preservation**: As detailed below, click this button to create a new family being served within Family Preservation Services.
- **IARCA Document Library**: In order to download the EON User Manual or blank packets, NCFAS, Satisfaction Surveys, or PFS-2 Survey with scoring instructions, after clicking on this tab click on the EON symbol titled IARCA Document Library. Click on the desired document to download it (button at the top); you can then open and print it. This is useful for staff who complete packets in a rural area without internet or who complete packets and then submit them to a designated staff member for data entry.
- **Search**: You can use the main search bar at the top right of the screen to search for a client by name, DOB, or agency case number. You can also search for packet numbers.
- **Manipulating Lists**: After clicking "View All" on any packet list or your My Clients list:
  - You can change to other "list views" as needed. To do so, click the title of the list (e.g. "My Incomplete Packets") and select the alternative list view you wish to see (e.g. change to "Agency-Wide Incomplete Packets or from "My Clients" to "All Agency Clients").

- You can change the order of the list by clicking on any of the column headers. An arrow will show whether the list is sorting ascending or descending alphabetically/numerically by that column; click it again to change to the opposite.

Create a New Client

1. To create a new individual client (child) record, for all programs other than Family Preservation Services, click on "New Client" in the purple bar at the top of the screen:

IMPORTANT NOTE: Before creating a client, you should first use the main Search bar to ensure the client is not already created in the system from a previous placement.

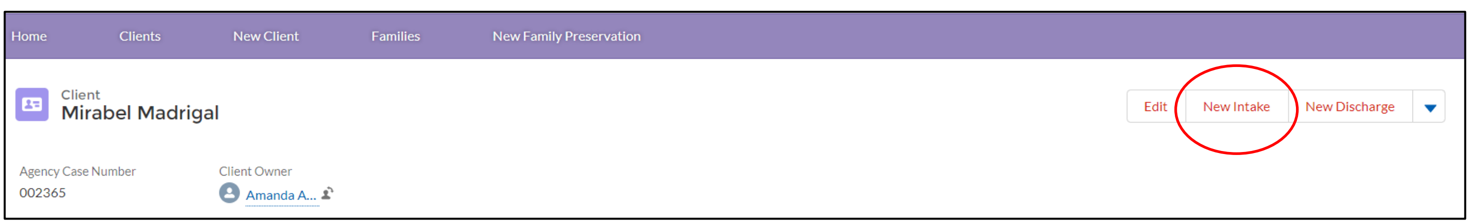
2. On the New Client screen, fill in all the required information as well as the client's first name. Inputting your agency's case number is optional, but recommended, and individual agencies may direct their staff to always complete these fields – refer to guidance from your supervisor.

3. Once all information is entered, click the red "Confirm" button. The system will then create and take you to the client's page.

Create a Packet

Create an Intake Packet

1. On the client's page, click "New Intake" on the upper right side of the screen:



2. On the screen that pops up, complete the required fields of Program and Admission Date. For a list of program names, see page 1.

   If you are uncertain which program to choose, consult with your supervisor and/or IARCA outcomes staff; **it is <u>critical</u> that the correct program is chosen**, as it affects which tools/questions are created and required.

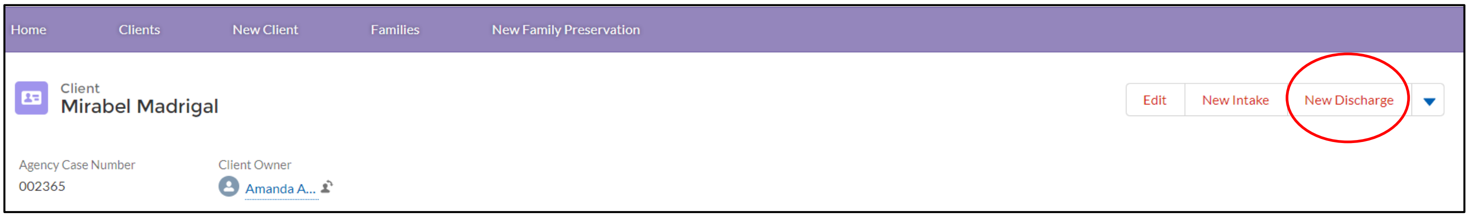
   Once you type in at least three letters of the program name, options to choose from will start to pop up.

   If the client is also being served in other secondary programs by your agency, you may optionally enter those. If the admission is being entered into the system a considerable amount of time after it actually happened, you may optionally enter the date it is being completed/entered.

3. Once the required fields are completed, click Save.

Create a Discharge Packet

1. On the client's page, click "New Discharge" on the upper right side of the screen:



2. On the screen that pops up, complete the required fields of Matched Intake Packet and Discharge Date. **It is <u>critical</u> that the correct discharge date is entered**, as it affects which tools/questions are created and required.

   When you click in the "Search Packets" box under "Matched Intake Packet", the system will show you all the intake packets that exist for that client. Select the intake packet from the placement you are currently discharging. This allows the system to compare intake information to discharge information.

   If the discharge is being entered into the system a considerable amount of time after it actually happened, you may optionally enter the date it is being completed/entered.

3. Once the required fields are completed, click Save.

Follow Up Packets: Auto-Creation Process and Timelines

Once a discharge packet is created, the system will automatically create the Follow Up Packets at the appropriate time. It will also email the agency's administrator(s) to alert them that a Follow Up Packet has been created. The timing of these packets depends on the program, as below:

Programs	Follow Up 1 Due Date	Follow Up 2 Due Date
• Day Treatment • Family Preservation • Home Based • Older Youth Services	Three (3) Months After Discharge	Six (6) Months After Discharge
• Outpatient Treatment • All Residential programs (including PRTF) • Traditional Foster Care • Treatment/Therapeutic Foster Care	Six (6) Months After Discharge	Twelve (12) Months After Discharge

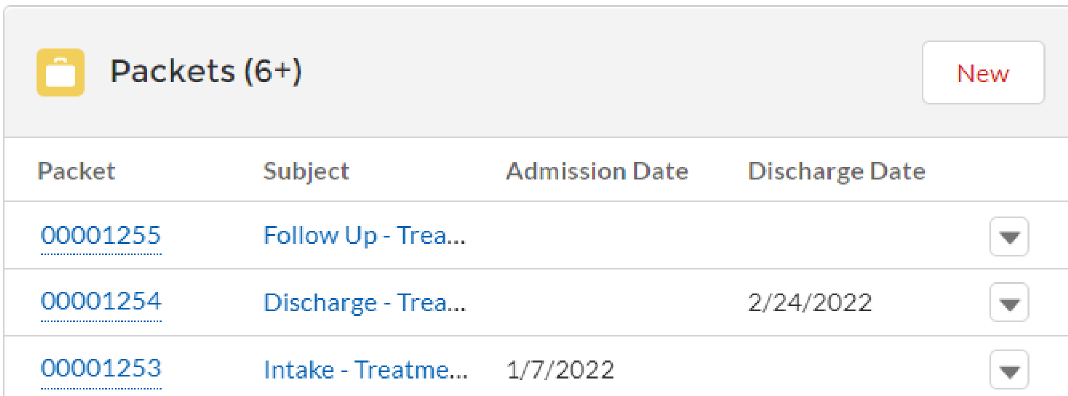
The packets are created 2 weeks before the due date, and are available for completion for up to 2 weeks after the due date. *If you enter a discharge so late that this window has already passed, then the Follow Up Packets will not be created.*

Shelter Care and Crisis Stabilization do not require Follow Up Packets, due to the nature of their programming.

Complete a Packet

Packet Information

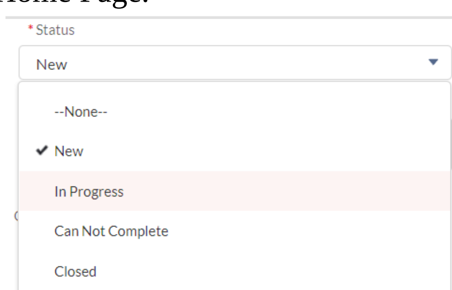
1. Once a Packet is created (above), it will display on the client's page in the "Packets" box on the righthand side of the screen:



The list in this box shows the Packet Number (automatically created by the system), the Subject (which type of Packet and the Program), and the Admission or Discharge Date.

2. To open a packet, click on the Packet number or its Subject line.

3. On the packet page, click the pencil icon next to "Status" and change the status to "In Progress". Updating this status value accordingly as you work through packets will help you and your supervisor keep track of where you're at with each packet, as this value shows on the lists on the Home Page.



4. If desired, you can scroll down to enter Other Assessment Scores, such as the CANS, C-SSRS (suicide screening), ACEs, or other assessment tools used by your agency.

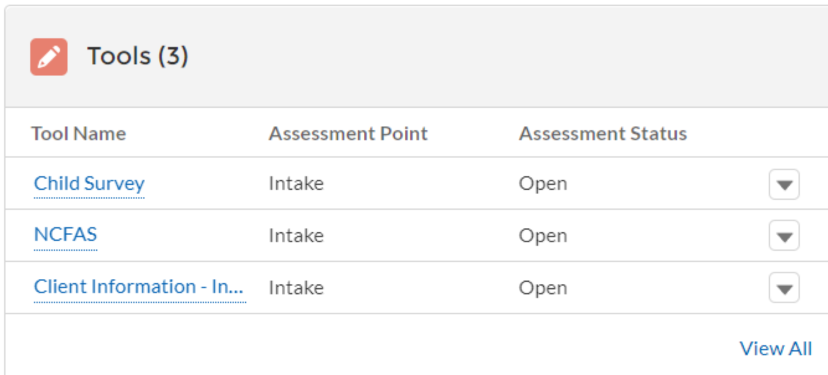
5. Your agency may instruct you to enter certain notes in either the Description or Internal Comments field. Examples include noting which family was being assessed at intake (e.g.

bio or foster) in case of worker turnover before discharge, or noting to which specific Residential Unit the client is assigned.

6. Click Save at the bottom of the page.

Complete Assessment Tools

1. A list of required tools is on the righthand side of the packet page:



All of the tools which are required for the packet type (intake/discharge/follow up), program, and the client's age will appear here. You must complete all of the tools listed (you may have to click "View All" to see them all). Once you do, the packet will automatically appear on your supervisor's list of packets they need to review and approve.

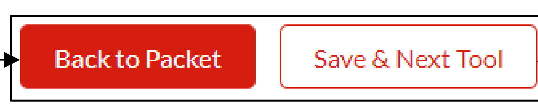
2. Click on a Tool Name (e.g. Child Survey) to open it.

   a. Each tool has some questions which are required, noted by a red asterisk; you will not be able to save the tool until all of these questions are answered.

      In some tools, a question may become required depending on how you answer a previous question; in this case, it may not look required at first but you will get an error message when you attempt to save and then it will show which field is required.

   b. For all tools besides NCFAS, answer the required and desired optional questions, and then hit Save & Next Tool in the upper right hand corner. If you hit Back to Packet, your work will NOT be saved!

Any answers just entered will NOT be saved! It will not erase answers that were previously saved.



Saves your answers and takes you to the next incomplete tool.

      Once you have completed all the tools, when you hit "Save & Next Tool" it will pop up a "Warning" that all required assessments have been completed. At that point, you can safely hit "Back to Packet" or use other navigation tools in the purple bar to move to your next task.

   c. Child Survey Details

      i. For the question "Does the child come from a single parent family?", the home is considered "Single Parent" IF either of the following apply:

1. The primary caregiver is living with the child(ren) and the secondary caregiver is absent from the home (e.g., due to divorce, separation, maintaining second home, death.)

2. Two adults are living in the home, but the secondary caregiver has lived in the home for less than one year or the secondary caregiver has not lived *consistently* in the home

d. Client Information – Intake/Discharge/Follow Up Details:

i. Restrictiveness of Living Environment Scales:

1. At intake, this will auto-populate a response for some programs – do not change this! If it does not, choose the living situation the child is in upon admission to your program. If you need assistance choosing, contact your supervisor or IARCA outcomes staff.

2. At Discharge and Follow Up, choose the living situation the child was in once they discharged or when they were contacted for follow-up. If you need assistance choosing, contact your supervisor or IARCA outcomes staff.

ii. Employment at Discharge and Follow Up:

1. If the client is less than 14 years old, the system will automatically populate "N/A – child under 14 years of age".

2. For all clients aged 14+, choose the appropriate response. "Employment ready" is defined as being able, with appropriate outside help, to find, acquire, and keep a suitable job as well as to be able to manage transitions to new jobs as needed. Some of the measures needed are: is the youth willing to work, able to learn new skills, believe they can succeed in a job, and able to overcome personal challenges.

iii. Nature of Discharge – use the following definitions to determine the proper response:

1. In Accordance with Plan of Treatment: The referral source and the provider have made a joint decision to discharge. It does NOT require completion of EVERY goal of treatment but does reflect a general agreement between the provider and the referral source that the child/youth was successful in program.
2. Runaway: The child is on runaway at the time of discharge and has made the decision to leave (a self-discharge).
3. Removal initiated/mandated against the recommendation of the provider: The referral source has made the decision to discharge against the recommendation of the provider. In other words, the child was removed or pulled from placement.

4. Discharge initiated by provider without accomplishment of goals: The provider initiates or makes the decision for the child to leave – an administrative discharge from the program – because he/she is not successful in the program.
5. Death while in placement: Clinician indicates if by Suicide, Accidental, Homicide, Natural Causes, or Unknown.

e. CYRM (Child and Youth Resilience Measure) details and instructions:

   i. This tool is required for all clients aged 9 and up; it will not be created for those under age 9.

   ii. The tool can either be completed by the child themselves if age/developmentally appropriate, or by a "Person Most Knowledgeable" (PMK). A PMK could be a primary caregiver, involved older sibling, teacher, youth care worker (yourself), or others who play a significant role in the individual's life and are familiar with their challenges, opportunities, and resources. Indicate which person (youth or PMK) is completing the tool in the first question.

   iii. The tool must be administered individually, not in group settings. Read each statement to the youth and ensure that they understand the question.

   iv. Preface the assessment by relaying the following general information: "Listed below are a number of questions about you, your family, your community, and your relationships with people. These questions are designed to better understand how you cope with daily life and what role the people around you play in how you deal with daily challenges. Each question/statement should be answered according to how you believe the statement fits for you. There are no right or wrong answers."

   v. The tool was developed by Ungar & Liebenberg, 2011.

f. NCFAS Details:

   i. The required domains for the assigned program type are marked with an asterisk. Your agency may also want you to complete certain optional domains; check with your supervisor.

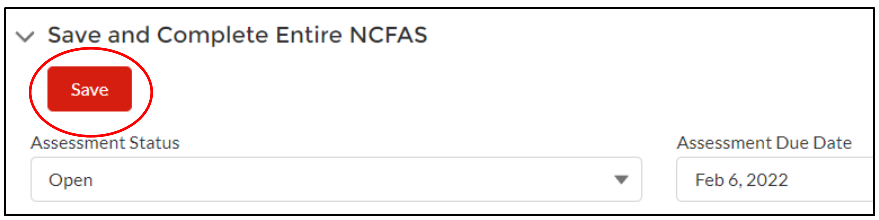
   ii. Definitions for the types of situations for each question which constitute a "Clear Strength", "Baseline/Adequate", or a "Serious Challenge" are listed in the Definitions section, underneath the Domains. Please refer to these as needed.

   iii. Since this is such a long tool, the navigation is a bit different to allow for saving individual domains in case you cannot complete the entire tool at one time.

1. Click on a domain name (e.g. Parental Capabilities) to display its questions/sub-domains. Enter a response for each item, **then click Save under the Domain name**:

Click on the next Domain you need to complete, then repeat this process until the entire tool is complete.

2. Once the entire tool has been completed, scroll to the bottom and click on the tab titled Save and Complete Entire NCFAS. Click the Save button; this will automatically mark the entire tool as closed.



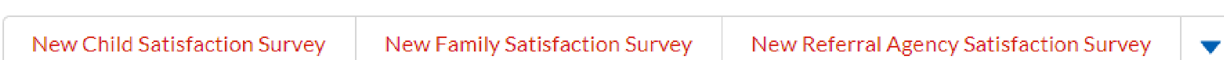
g. Services Survey details:

i. Use this tool at discharge to indicate which services were provided to the client while they were in your program, no matter who/what agency provided them! For example, if the client is in a foster care placement with your agency, but is receiving individual therapy from another agency, you would still include Individual Therapy.

Satisfaction Surveys

IARCA recognizes that some agencies complete satisfaction surveys of their own; as such, we do not require use of ours. However, you should check with your supervisor as to whether your agency has its own internal "requirement" that you have clients or referral sources complete our satisfaction survey(s). To create and complete a survey at discharge:

1. At the top of the Discharge Packet page, click on the button for the type of survey you wish to create:



2. In the window that pops up, click Save.
3. The survey will now appear in the Tools box on the packet page, although you may have to click "View All" to see it. Click on the name of the survey to open it.
4. Enter (or have the client/family member/referral source enter) the applicable responses.

5. Click “Save & Next Tool”. The survey will automatically calculate the scores when you hit this button.

Important Note about Follow Ups

Completing Follow Up packets can provide your agency and IARCA with valuable information about how well the changes a client experiences while in your program persist over time. However, we recognize that it is not always possible or allowable to contact clients after discharge.

If you are unable to contact a client to complete a Follow Up packet, complete these steps to indicate this to your supervisor:

1. From the Client’s page, click on the appropriate Follow Up packet in the Packets box.

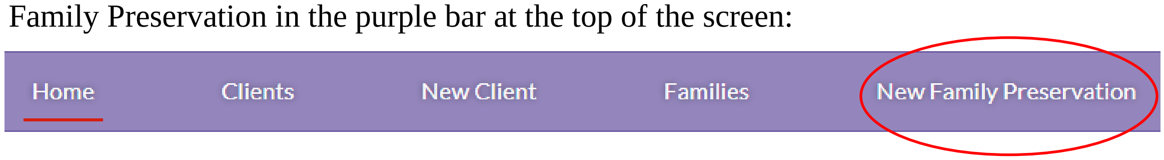
2. Click the pencil icon under “Status”:
3. Change the Status to “Can Not Complete”.
4. Click Save at the bottom of the screen.

If your agency does not complete Follow Up packets as a rule, then they will periodically be deleted in mass on a regular schedule (likely quarterly), and you do not need to follow the steps above. Check with your supervisor if you are not sure if this applies to your agency.

Family Preservation

Create a New Family

1. To create a new family record for a Family Preservation Services case, click on “New Family Preservation in the purple bar at the top of the screen:



2. On the New Family Preservation screen, fill in all the required information.

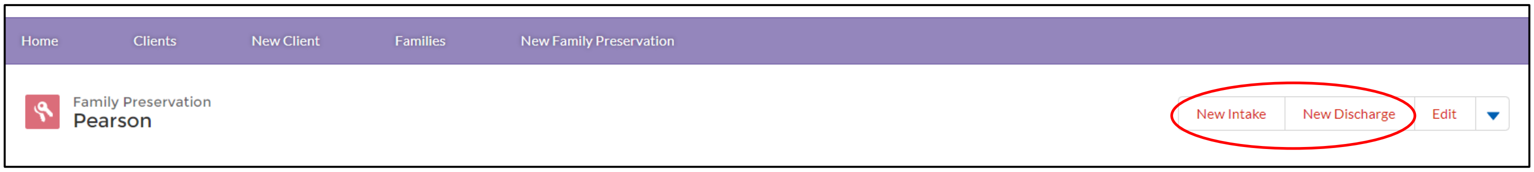
   For Race and Ethnicity, add all that apply for all family members.

   Inputting your agency’s case number, children listed on the referral, and other household members are all optional, but recommended, and individual agencies may direct their staff to always complete these fields – refer to guidance from your supervisor.

3. Once all information is entered, click the red “Confirm” button.

Create Intake & Discharge Packets

1. To create an intake or discharge packet for a Family Preservation case, navigate to the family’s page. Click the New Intake or New Discharge buttons, as needed:



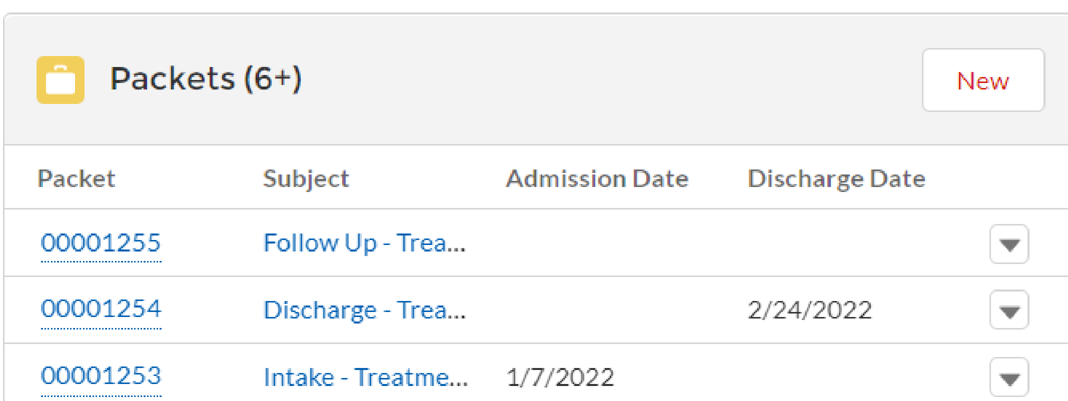
2. Complete the required fields.
   a. Intake: Admission date
      i. Optional: If the family is also being served in other secondary programs by your agency, you may optionally enter those.
   b. Discharge: Discharge Date and Matched Family Preservation Intake
      i. **It is <u>critical</u> that the correct discharge date is entered**, as it affects which tools/questions are created and required.
      ii. Matched Family Preservation Intake: When you click in the “Search Packets” box under “Matched Family Preservation Intake”, the system will show you all the intake packets that exist for that family. Select the intake packet from the placement you are currently discharging. This allows the system to compare intake information to discharge information.
3. Click “Save”.

Follow Up Packets

See section “Follow Up Packets: Auto-Creation Process and Timelines” and “Important Note About Follows Ups” above.

Enter Packet Information

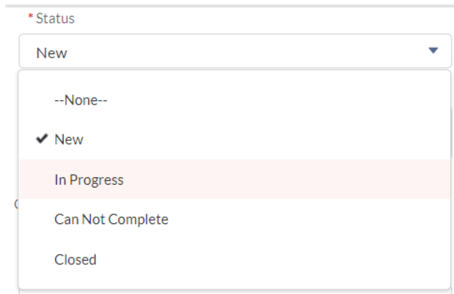
1. Once a Packet is created (above), it will display on the family’s page in the “Packets” box on the righthand side of the screen:



The list in this box shows the Packet Number (automatically created by the system), the Subject (which type of Packet and the Program), and the Admission or Discharge Date.

2. To open a packet, click on the Packet number or its Subject line.

3. On the packet page, click the pencil icon next to “Status” and change the status to “In Progress”. Updating this status value accordingly as you work through packets will help you and your supervisor keep track of where you’re at with each packet, as this value shows on the lists on the Home Page.



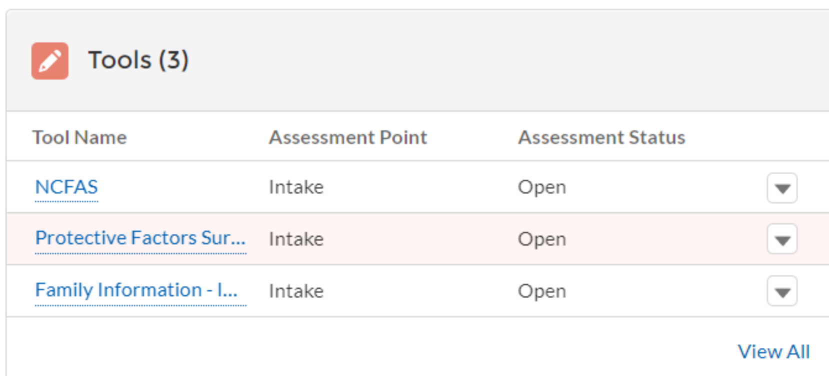
4. If desired, you can scroll down to enter Other Assessment Scores, such as the CANS, C-SSRS (suicide screening), ACEs, or other assessment tools used by your agency.

5. Your agency may instruct you to enter certain notes in the Description field.

6. Click Save at the bottom of the page.

Complete Family Preservation Assessment Tools

1. A list of required tools is on the righthand side of the packet page:



All of the tools which are required will appear here. Once you complete all the tools, the packet will automatically appear on your supervisor’s list of packets they need to review and approve.

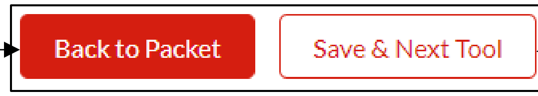
2. Click on a Tool Name (e.g. NCFAS) to open it.

    1. Each tool, except the PFS-2, has some questions which are required, noted by a red asterisk; you will not be able to save the tool until all of these questions are answered. For the PFS-2, if you completed it elsewhere and do not wish to enter it here, simply open the tool and click the “Save & Next Tool” button.

       In some tools, a question may become required depending on how you answer a previous question; in this case, it may not look required at first but you will get an error message when you attempt to save and then it will show which field is required.

2. For all tools besides NCFAS, answer the required and desired optional questions, and then hit Save & Next Tool in the upper right hand corner. If you hit Back to Packet, your work will NOT be saved!

Any answers just entered will NOT be saved! It will not erase answers that were previously saved.

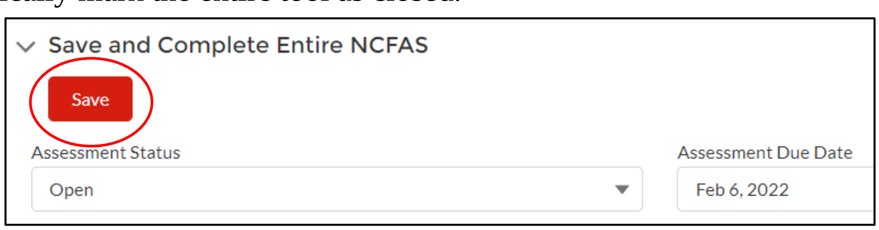


Saves your answers and takes you to the next incomplete tool.

Once you have completed all the tools, when you hit "Save & Next Tool" it will pop up a "Warning" that all required assessments have been completed. At that point, you can safely hit "Back to Packet" or use other navigation tools in the purple bar to move to your next task.

3. NCFAS Details:
   a. The required domains for Family Preservation are the only ones which appear, and all must be completed.
   b. Definitions for the types of situations for each question which constitute a "Clear Strength", "Baseline/Adequate", or a "Serious Challenge" are listed in the Definitions section, underneath the Domains. Please refer to these as needed.
   c. Since this is such a long tool, the navigation is a bit different to allow for saving individual domains in case you cannot complete the entire tool at one time.
      i. Click on a domain name (e.g. Parental Capabilities) to display its questions/sub-domains. Enter a response for each item, **then click Save under the Domain name**:

      ii. Click on the next Domain you need to complete, then repeat this process until the entire tool is complete.
   d. Once the entire tool has been completed, scroll to the bottom and click on the tab titled Save and Complete Entire NCFAS. Click the Save button; this will automatically mark the entire tool as closed.



4. PFS-2 Details
   a. We do not require you to enter any responses in this tool. If you completed it elsewhere and do not wish to enter it here, simply open the tool and click the "Save & Next Tool" button.

b. Please refer to the PFS-2 User Manual at https://friendsnrc.org/wp-content/uploads/2020/02/PFS-2-User-Manual-10.22.18.pdf for detailed instructions on how to complete and score (page 31-33) the tool.

5. Services Survey details:
    a. Use this tool at discharge to indicate which services were provided to the family while they were participating in Family Preservation Services, no matter who/what agency provided them! For example, if a member of the family received residential drug treatment from another agency while you were working with the rest of the family in Family Preservation, you would still include "Residential drug/alcohol treatment program".

6. See Satisfaction Surveys above.

Agency Supervisors/Admins

Home Page Layout and Usage

In addition to the Navigation covered above, as an agency administrator/supervisor you have some additional features and ways you should use what's on your home page:

1. "Packets with Incomplete Tools" and "Family Pres Packets with Incomplete Tools": Use these lists to help monitor whether your staff are completing packets in a timely manner.
2. "Packets Needing Approval": This list shows you all of the packets your staff have completed which you now need to review for accuracy and then approve (see below). Click on the Subject line to open the packet. You may have to click "View All" to see the full list.
3. The "Staff" tab in the purple bar shows you the list of all your agency's staff members with EON accounts.
4. Clicking "More" shows the "New Staff" button which allows you to create a new staff member (see below for details) and the IARCA Document Library.
5. If you need to view when a staff member last logged in to the system, click on "More" in the purple bar and then "Agency Management". Click on the user's name, and then on the next screen you can find their "Last Login". NOTE: you cannot actually make any changes to a user's account or active status from these pages; see below for those steps.

Approving Packets

IMPORTANT: IARCA will not use data in any reports (including your agency's Provider Report) unless it has been approved by an agency administrator. Follow these steps:

1. From the Packets Needing Approval list, click on the Subject line of the packet you wish to review and approve.
2. Review the information on the packet page, as well as the responses within each Tool (click on a tool's name in the Tools box to open each tool).
    a. On the packet page, ensure the following are correct:
        i. Admission/discharge date
        ii. Program type

        iii. Other Assessment Scores
    b. On the NCFAS, ensure that the user did not enter "Unknown" or "N/A" except when actually appropriate.
    c. If there are errors, you can correct them yourself or (best practice) communicate the needed changes to the responsible staff member.
3. Once the packet's information is all accurate, on the packet page click the pencil icon to the right of "Approval Complete", then check the box and click "Save" at the bottom of the screen.

Follow Ups that Cannot be Completed

If a user cannot contact a former client/family in order to complete a Follow Up Packet, then they should mark that packet's status as "Can Not Complete" (see above - Important Note about Follow Ups).

In your "Packets/Family Pres Packets with Incomplete Tools" lists, if you see a Follow Up packet with a status of "Can Not Complete", complete these steps:

1. Click on the Packet Number to open the packet.
2. You'll need to delete each tool (will only ever be 1 or 2 tools). Do the following for each tool:
    a. In the Tools box on the right side of the packet page, click on the down arrow next to the tool.
    b. Click Delete.
    c. In the box that pops up, click "Delete".
3. Click on the pencil icon to the right of "Approval Complete", then check the box and click "Save" at the bottom of the screen.

Completing Follow Up Packets can provide your agency and IARCA with valuable information about how well the changes a client experiences while in your program persist over time. However, we recognize that it is not always possible or allowable to contact clients after discharge. If your agency can not complete Follow Up packets as a rule, then an agency admin needs to alert IARCA to this, and we can mass delete Follow Up Packets on a regular schedule (likely quarterly).

Creating a New User

As an agency admin, you are responsible for creating new accounts for new staff members. Follow these steps:

1. On the purple navigation bar, click "More" and then "New Staff".
2. On the next screen, enter the staff member's First Name, Last Name, and email address. Then click Confirm.

3. On the page that then opens, click “Enable Partner User” in the upper right corner.

4. In the window that pops up, complete these steps:
    a. **For the Username, add “.eon” to the end of the new user’s work email address.**
    b. Ensure that the staff member’s work email address is listed in the Email field.
    c. Choose the appropriate “Role”:
        i. Field staff should be “(agency name) Partner User”
        ii. Supervisory/administrative staff (who need the ability to approve packets and/or create new users) should be “(agency name) Partner Manager”
    d. Choose the appropriate “Profile”:
        i. Field staff should be “Agency User”.
        ii. Supervisory/administrative staff (who need the ability to approve packets and/or create new users) should be “Agency Admin”
    e. Do NOT uncheck the “Generate new password and notify user immediately” – this is what sends them the link to verify their account and log in!
    f. Click “Save” at the top of the pop-up window.
5. Inform the new staff member that they should receive an email from “support@salesforce.com” with a link they need to click to “Verify Account”. They may need to check their spam/junk folder. This email will also inform them of their username and provide a link to the log-in page.
6. Share this User Manual and a link to the training video with the new staff member!

Updating a User’s Information

1. On the purple navigation bar, click “Staff”.
2. Find the staff member in the list and click on their name.
3. If you need to edit any information on the staff member’s page, click on a pencil icon, edit as needed, and then click Save at the bottom of the page.
4. If you need to change a staff member from a user to an admin, or vice versa:
    a. Click “View Partner User” in the upper right corner
    b. Click “Edit” on the pop-up window
    c. Make changes as needed in the Role and Profile fields
    d. Click Save
5. If you need to clear a user’s password so they can set a new one:
    a. Click “View Partner User” in the upper right corner
    b. Click “Edit” on the pop-up window
    c. Check the box for “Generate new password and notify user immediately”
    d. Click Save
    e. The user will receive an email from developer+iarca@radianhub.com with a link to set a new password (they may need to check spam/junk/quarantine).

All log-in related links in emails from Salesforce will expire within 24-48 hours, so encourage them to use the link right away or you'll have to repeat this process!

Changing a User's Assigned Agency Administrator

If you need to change who the assigned Agency Admin is for a user (so someone else gets email notifications about their packets, or to allow for creating list views with only each admin's assignee's clients/packets):

1. On the purple navigation bar, click "More" and then "Agency Management".
2. Click the drop-down arrow to the right of the staff member whose assigned admin you want to change, and click "Edit Member".
3. In the pop-up window, find the "Agency Admin" field and delete the current entry (click the X or hit backspace/delete after clicking in the field).
4. Search for the name of the new admin and select it. Click Save.

Deactivating a User

As an agency admin, you are responsible for deactivating user accounts when staff leave your agency. This is critical for data security! Follow these steps:

1. On the purple navigation bar, click "Staff".
2. In the list, find the staff member who has left the agency in the list and click on their name.
3. Click "View Partner User" in the upper right corner.
4. Click "Edit" on the pop-up window.
5. Uncheck the "Active" box.
6. Click "OK" on the pop-up window.
7. Click Save.

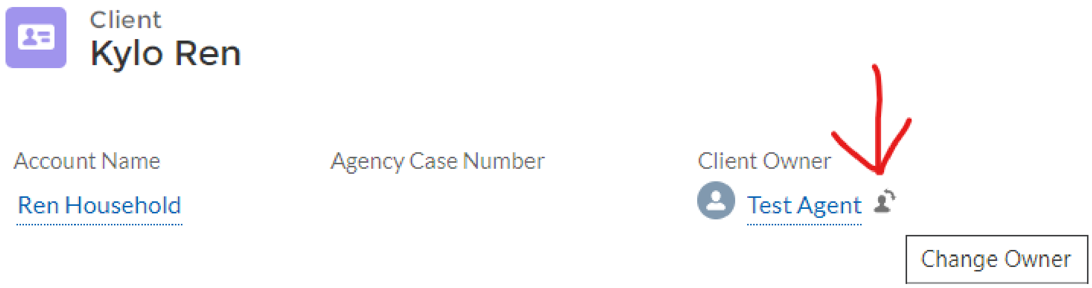
Transferring Ownership of Clients

Clients will only appear in a user's "My Clients" list if the user is assigned as the "owner" of clients. At times, you may need to change the ownership of a client for various reasons – staff turnover, shifting responsibilities, or because clients were owned/created by users in the previous EON system who are no longer with your agency. You can change ownership of clients individually; unfortunately it is not currently possible to change ownership of multiple clients at once. Also, if an Agency Admin is the current client owner, they or an IARCA Admin will have to change the ownership.

To change ownership of a client:

1. Navigate to the Client Page of the client for whom you want to change ownership (e.g. click on the Client Name from one of the lists on your Home page).

2. Under “Client Owner”, click the “Change Ownership” icon to the right of the name of the current client owner.



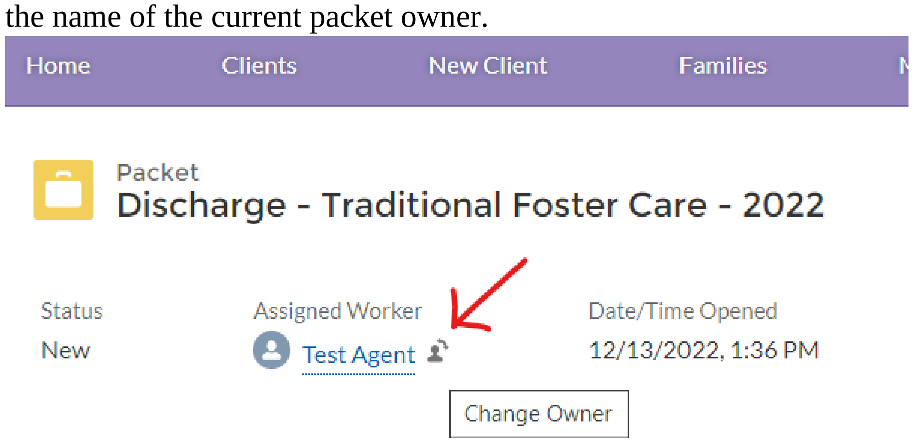
3. In the pop-up “Change Client Owner” window, search for the name of the staff member who should be the new owner of the client. Once their name is selected, click Change Owner. If desired, you can check the “Send notification email” box for the new owner to receive an email notifying them that they now own this client.

NOTE: Transferring ownership of a client will NOT transfer ownership of previously created packets. To do so, see next section.

Transferring Ownership of Packets

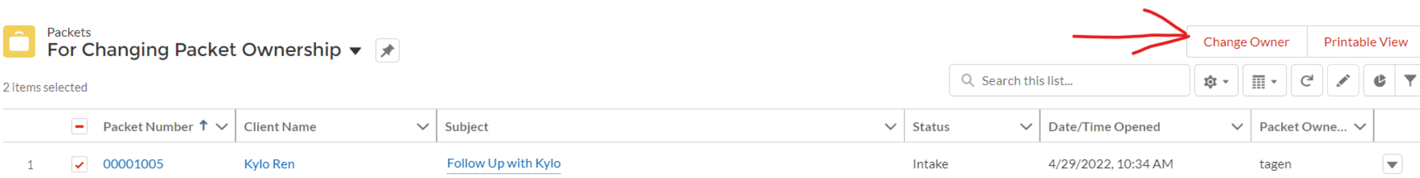
Packets will only appear in a user’s “My Incomplete Packets” list if the user is assigned as the “owner” of packets. At times, you may need to change the ownership of a packet for various reasons – staff turnover, shifting responsibilities, or because clients were owned/created by users in the previous EON system who are no longer with your agency. You can change ownership of packets individually or en masse.

1. To change ownership of a single packet:
    a. Navigate to the Packet Page of the packet of which you want to change ownership (e.g. click on the Packet Number or Subject from one of the lists on your Home page).
    b. Under “Assigned Worker”, click the “Change Ownership” icon to the right of the name of the current packet owner.

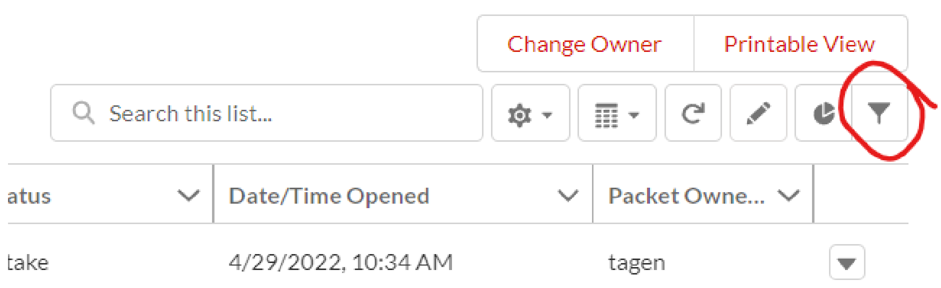


    c. In the pop-up “Change Owner” window, search for the name of the staff member who should be the new owner of the packets. Once their name is selected, click Change Owner. If desired, you can check the “Send notification email" box for the new owner to receive an email notifying them that they now own these packets.

2. To change ownership of a group of packets:
   a. Under any of the Packets lists on your Home page, click "View All".
   b. Click the "gear" icon in the upper right corner of the list, then click "New". This allows you to create a new "List View" that you can manipulate as needed.
   c. Give the list a List Name, such as "For Changing Packet Ownership".
   d. There will be a "Filters" section that opens on the right side of the screen. Within this, click on the "Filter by Owner" box and change it to "All Packets". Click Save. You can now close the Filters box by clicking the X on the top right corner of it.
   e. You can now select the packets for which you want to change their ownership by checking the boxes to the left of their names, then click the "Change Owner" button near the top right corner of the screen.

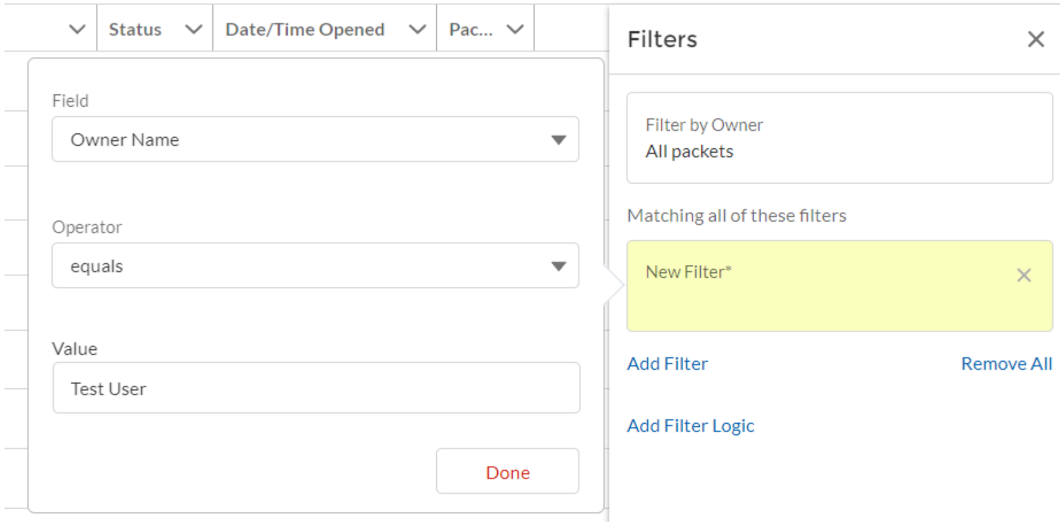


   f. In the pop-up "Change Owner" window, search for the name of the staff member who should be the new owner of the packets. Once their name is selected, click Submit. If desired, you can check the "Send notification email" box for the new owner to receive an email notifying them that they now own these packets.
   g. If you want to change the ownership of all the clients currently owned by a specific staff member, click on the Filter icon again.



      i. Once the Filters box is open, click "Add Filter".

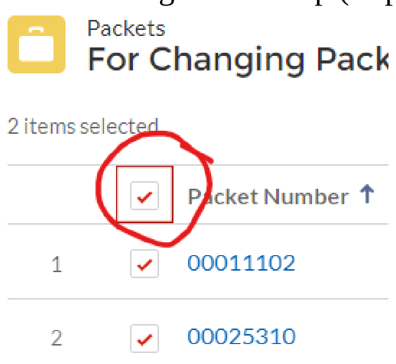
ii. In the “Field” dropdown, select “Owner Name” and in the Value field type in the name of the staff member who currently owns the packets



you want to transfer to another staff member. Click Done.

iii. Click Save at the top right of the Filter box. You can then close the Filter box again.

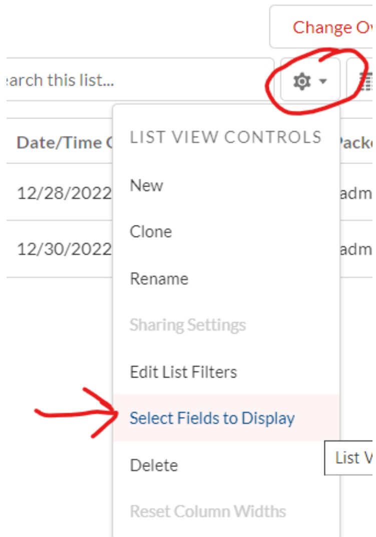
iv. You can now click the “Select All” box and then follow the directions above to change ownership (steps e & f).



v. Repeat this process as needed, changing Value in the Owner Name filter as needed. You could also use other fields to filter the list as needed, such as Program, Packet Record Type (Intake/Discharge/Follow Up), Status, Tools to Complete, etc.

h. You can also edit the columns in your list as desired:

i. Click the little gear icon and then select "Select Fields to Display".



ii. Use the right/left arrows to move fields out of or into the "Visible Fields" box. You can also rearrange the order of the columns using the up/down arrows. A suggested helpful layout is shown below: