Introduction to Clara

Welcome to the Pollywog Project! We are delighted that you are partnering with us in this groundbreaking endeavor, and hope that the materials contained in this User's Manual will help you to understand the workings of the Clara system.

Let's begin by giving you some basic information about the Pollywog Project:

THE WEBSITE

1. The Pollywog Project includes a website, www.pollywogfamily.org, where families and individuals can go to sign up for Pollywog.

2. The website contains information about classes and workshops (prenatal and postnatal) being held in the three-county region, as well as information about resources for families.

3. When people sign up for Pollywog, they will receive a call from a member of the Pollywog staff in the next three days.

4. As a partner of the Pollywog Project, you can request that your agency information and logo be posted on the website, and that your classes or workshops be included in the listings.

THE DATABASE

1. You should have received an email from the Pollywog Database Coordinator with your license and log-on information, prior to receiving this User's Manual. Please follow the directions in the email to set-up your password.

2. To open the VistaLogic database, nicknamed "Clara", please enter: https://www.vistalogic.net/clarabeta

3. Enter your username and your password to activate the program.

4. You should now be on the Clara Main Menu.

≡ CARE MENU

≡ 🏵 **TRASK, LEANNE**

▼ RECORDS

⊘ Service Requests   Q +

▤ Applications   Q +

⊙ Referrals   Q +

💓 Care Plans   Q

▼ ACTIONS

Courses

Trask, LeAnne

POLLYWOG
Family Connections

WORK ITEMS

Service Requests - Pending Review   **33**

Service Requests - Pending Completion   **103**

Referrals - Pending Review   **7**

Referrals - Pending Approval   **2**

Referrals - Pending Completion   **2**

Table of Contents

This Table of Contents reflects the Main Menu of the "Clara" VistaLogic database. Some menu items on the Main Menu are not in use yet, so are not included in the Table of Contents at this point. If and when they are put into use, they will be added, as well as instructions for their use.

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Clara Basic Functions

Adjacent to this document is a print-out of the Clara Main Care Menu. Let's review a couple of items that will assist you as you move through the database:

<div style="background-color:teal; color:white; padding:8px;">CARE MENU</div>

1. Any time that you wish to return to this Main Menu, from any screen in the database, press the orange "butterfly icon" in the top left corner of the screen, and you will be brought back to the Main Care Menu.

2. The green buttons with a number in the center are "To-Do Buttons":

    - The "Service Requests – Pending Review" button tells the Pollywog staff that there are new contacts that have signed-up through the website and requesting a service from Pollywog. These people will receive a phone call or email within the next three days. Please DON'T use this button to access the service requests as it is only for the Pollywog staff.
    - The "Service Requests – Pending Completion" button tells the Pollywog staff how many service requests are in process and waiting to be completed. Again, please DON'T use this button to access the service requests as it is only for the Pollywog staff.
    - The "Referrals – Pending Approval" button indicates that you have sent referrals to another agency and are waiting for their response. We'll explain this in greater detail further into the User's Manual.
    - The "Referrals – Pending Completion" button tells you how many referrals you have sent out to other agencies and are waiting to receive confirmation that the referral has been completed. We'll explain this in greater detail further into the User's Manual.

3. Your menu choices are listed down the left-hand side of the screen in the "Care" menu. Each of the choices will be explained on the following pages.

Service Requests

Each time someone goes to the Pollywog website and enters their information into the portal so that they can receive services from Pollywog, a "Service Request" is generated and sent to the Clara database. A new record is created and the basic client information is populated into the database record. When our staff speak to the client (or email them), they are able to assist the new client with their resource request.

For example, if Jane Doe went to the Pollywog website and signed into the portal, requesting that she get help finding child care and with parenting education classes, our staff will be able to see that information in the service request, and can then call or email Jane Doe and get her the information and registration for classes that she is requesting.

When a Service Request comes into Pollywog, it looks like this:
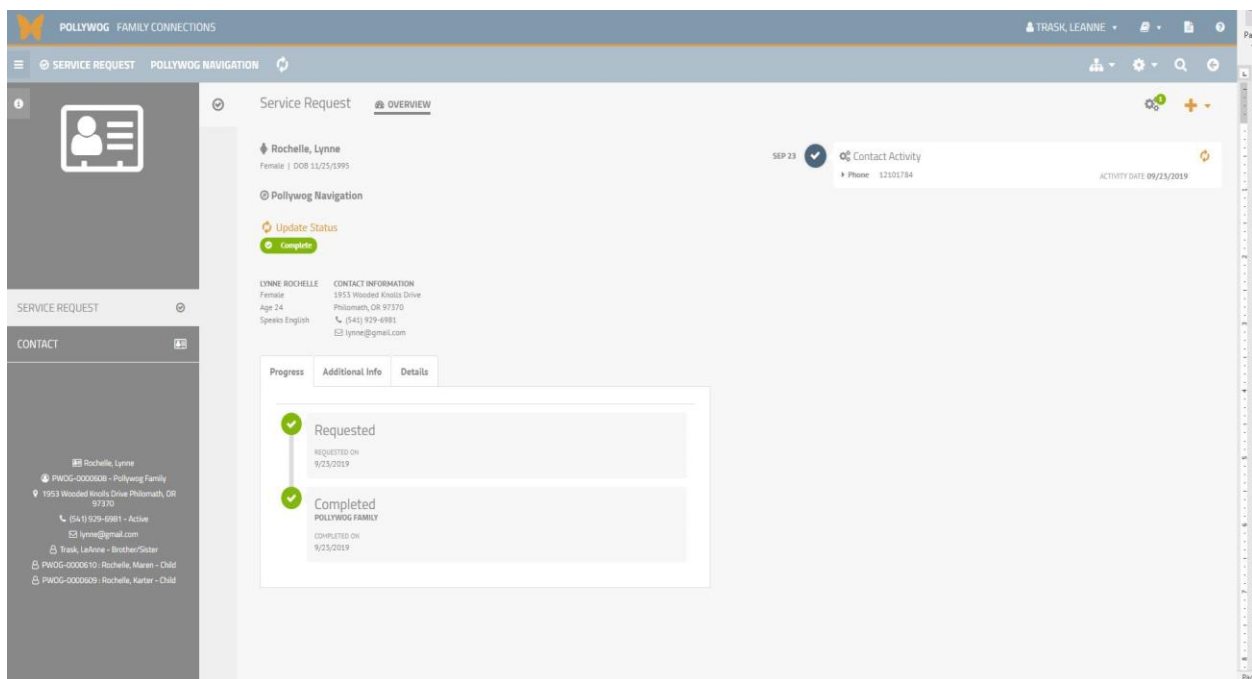
1) Contact information – All of the current information that we have is shown, including name, sex, age, preferred language, address, phone, and email.

2) When the Pollywog client submits their information through the portal on our website, a short survey pops up on the screen and asks for a few more pieces of information, including:
   - What county they live in
   - What information are they looking for
   - How they heard about Pollywog
   - Would they like to receive information from us via text message instead of by phone or email

3) Progress of Service Request:
   - Requested – shows the date the Service Request was made
   - Completed – shows the date the Service Request was completed

4) Contact Activity – When the Pollywog staff work with a new contact, they document each time that they tried to get a hold of them, if they talked to them by phone or email, how long the conversation lasted, and what is happening with the Service Request: Complete, In-Process, or Unable to Contact. All contact is documented.

Service Requests are completed by the Pollywog staff.

Applications

When a new person wants to become a Pollywog member, there is some information that we need to know, in order to inform them about services which they could potentially qualify for. Some of this information gathering seems very personal, but the hope is that the questions can be answered once, and then partners won't have to ask the same questions again and again because the information is documented in Pollywog.

Again, this is a process that the Pollywog Staff take care of when they speak to the new Pollywog client.

THE APPLICATION

1. Basic personal information gathered includes:

   - LAST NAME
   - FIRST NAME
   - MIDDLE NAME
   - PREFIX – Dr., Mrs., Sir, etc.
   - BIRTH DATE
   - GENDER
   - RACE & ETHNICITY – The drop-down menu attached to this field is the new model that the Oregon Health Authority is using. Click on all of the choices that apply to this client.
   - ADDRESS
   - PHONE
   - EMAIL

2. Pollywog asks for information about other children in the home, including their birth date, gender, race and ethnicity. The program also asks you to define the relationship: child, aunt, uncle, sibling, parent, grandparent, etc. Pollywog asks who the primary contact is for this child, and if this person is the guardian for this child.

3. Pollywog asks if the client is pregnant.

4. Pollywog asks about eligibility:

    - HOUSEHOLD MONTHLY INCOME (in dollars)
    - HOUSEHOLD SIZE
    - TYPE OF MEDICAL INSURANCE
    - PUBLIC ASSISTANCE CURRENTLY ON
    - SUPPORT FOR YOUR FAMILY IN THE AREA

5. Pollywog asks about Consent:

    - TYPE OF CONSENT
    - CONSENT START DATE
    - CONSENT END DATE

6. At the end of the question session, each member of the family is enrolled into Pollywog, and, if necessary, a care plan can be created for each member separately.

The final screen of the Application looks like this:

Referrals

The referral function allows you to send a closed-loop referral to any of our Pollywog partners, in a manner that is both HIPAA and FERPA compliant. Instead of waiting to talk to a partner or faxing a referral, it can all be done as an "eReferral", securely and quickly.

ADDING CLIENT REFERRALS

1. To Add a Referral:

   - On the Care Menu, click on the "+" next to referrals –

     ⊕ Referrals   Q   +

   - Add New Client Information or Select an Existing Client – (Fields with an orange bar at the beginning are required information that must be entered before you can move to the next screen or save it)

     - LAST NAME – Enter last name, including hyphenated names and names with spaces.
     - FIRST NAME – Enter first name, including spaces and other punctuation.
     - MIDDLE NAME – Enter middle name, if known.
     - PREFIX – Dr., Mrs., Sir, etc.
     - BIRTH DATE – Enter birth date in the mm/dd/yyyy style.
     - GENDER – Select gender from drop-down table.
     - SPOKEN LANGUAGE – Select language spoken at home from drop-down table.
     - RACE & ETHNICITY – Click on all of the choices that apply to this client. (This is the newest table from the Oregon Health Authority.)
     - ADDRESS – If you don't have address information, unclick the "Address" box, and all of the address information will disappear from the screen.
       - If this is a normal address, enter the street, city, state, zip code, and zip code extension fields, as normal.
       - If this person is homeless, click the "This person is

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homeless" box and the street information is auto-filled for you; however, the system still wants city, state, and zip code information.

- If this person has a separate mailing address, click on the "Enter separate mailing address" and additional fields will appear on the screen for entering the mailing information.
- PHONE – If you don't have phone information for a contact, unclick the "Phone" button and all of the phone information will disappear from the screen.
  - Under PRIMARY PHONE:
    - PHONE NUMBER – Enter the primary phone number.
    - PHONE TYPE – From the drop-down menu, select the type of phone that it is, such as home, mobile, work, etc.
    - PHONE STATUS – From the drop-down menu, select the status of this phone, such as active, disconnected, etc.
    - MESSAGE OK? – From the drop-down menu, select yes or no.
- EMAIL – If you don't have an email address for this contact, unclick the "Email" box and the email information will disappear from the screen.

2. Request Services:

- The screen that is now displayed contains a list of all of the services (and agencies that offer those services) that are available in this area (Linn, Benton, and Lincoln Counties). Your client's name will appear at the top of the screen, and you have some choices to make:

- STEP 1 – SEARCH FOR SERVICES
  - All of the available services are listed alphabetically on the left-hand side of the screen, under "Services".
  - If you click on "Services", you have the option of searching for services by "Location", which will give you the name of all of the agencies in the system.
  - Type the name of the service you wish to refer to in the search field next to "Services", such as "Home Visits" for example, and then press the search button, .

  - The center column on the page will now show you all of the agencies that offer home visits and you can scroll down through the list and see who they are.

- If you need more information about their service, you can click on the information button, ⓘ The system will process for a moment, and then you will be taken to the 211 information available about this service, including a complete description of what they do, eligibility requirements, area services, phone numbers and address. You can open and close all of the details for all of the services until you find the one that you (and your client) wish to use.

- Click on the **+ Add** button next to the agency you wish to refer to. The system will process for a moment, and then you'll be able to see in the right-hand column that Home Visits have been selected from a particular agency.

- Click on the **⊘ Save and Continue** button when you have selected your service.

- STEP 2 – REVIEW SERVICES
  - This screen is a reminder to the user that not all of the agencies who offer services are technically able to accept an on-line referral. If you believe that they are, click on the **⊘ Request this Service** button. If the referred to agency are not able to accept an on-line referral, click the **↺ Skip** button to exit the referral process.

- STEP 3 – CUSTOMIZING THE REFERRAL
  - This screen gives you the opportunity to customize the referral and give information to the referring agency. When the referral appears on the screen, you can see who it is for, who you are referring it to, and the type of service you are requesting.
  - REFERRAL URGENCY – Select a level of urgency from the drop-down menu. For example, if this client is in serious trouble and you are VERY concerned, please select "1-CRITICAL" from the drop-down menu. This information is only to assist the service agency that will be filling the referral.
  - REASON FOR REFERRAL – this field is formatted so that you can write a couple of sentences to the service agency. Please remember: no confidential info in this area!

- REFERRED ON – the system will default to today's date.
- Click on the [Save and Continue] button when you have finished.

- STEP 4 – SUBMITTING THE REFERRAL
  - This screen displays your finished referral, and allows you the opportunity for one more look before you hit the [Submit Request] button. Notice that there is a "release check" at bottom of the screen, and you cannot leave the screen without checking the box to indicate that your client has agreed to let you make the referral.

- STEP 5 – REQUESTING SERVICES
  - This screen gives you the opportunity to print out the referral instead of sending it digitally. For those agencies without the needed technology, this is a way to create a paper referral for them. Otherwise, press the [Close Client Referral] button.
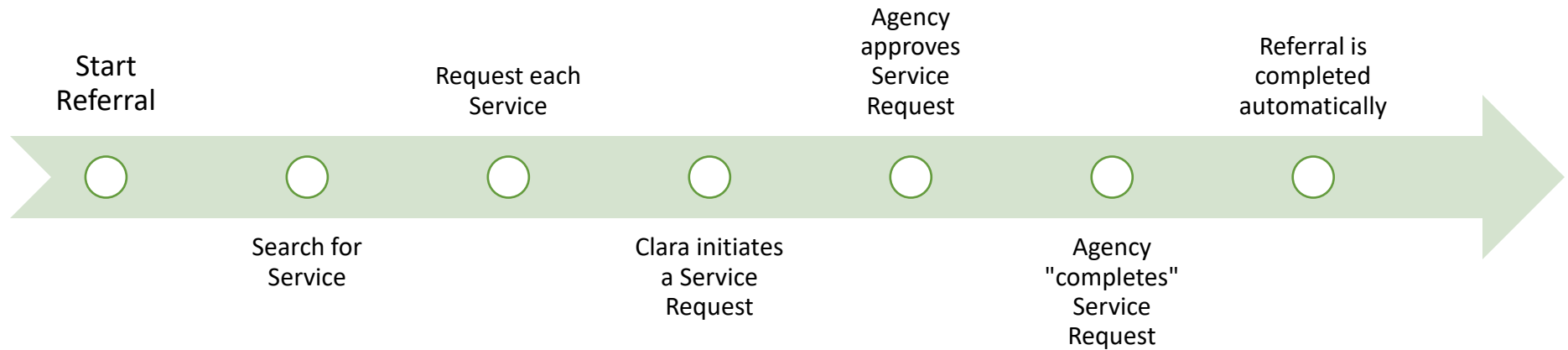
- STEP 6 – CLOSE CLIENT REFERRAL
  - This screen gives you the opportunity to print out the referral for your client to have a copy of, or to add another referral, or to close the referral and send it on its way.
  - Press the [Close Client Referral] button to send the request and return to the main menu.
  - Press the [Printable Form] button to print out a hard copy of the referral, including the 211 information to give to your client, or to save in your files. (See sample on page 15.)
  - Press the [Add Another Referral] button to return to STEP 1 and begin adding an additional referral for the same client.
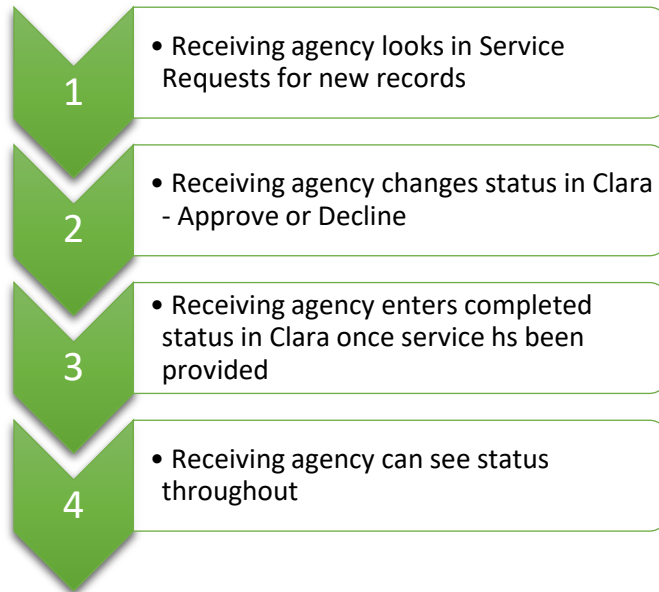
- If you believe that an agency is NOT able to accept an "eReferral" due to technology issues or staff limitations, you will instead be creating a "Service Request", and the process is a little different.

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- The following page contains an Overview of an eReferral versus a Service Request so that you will understand the different steps involved.
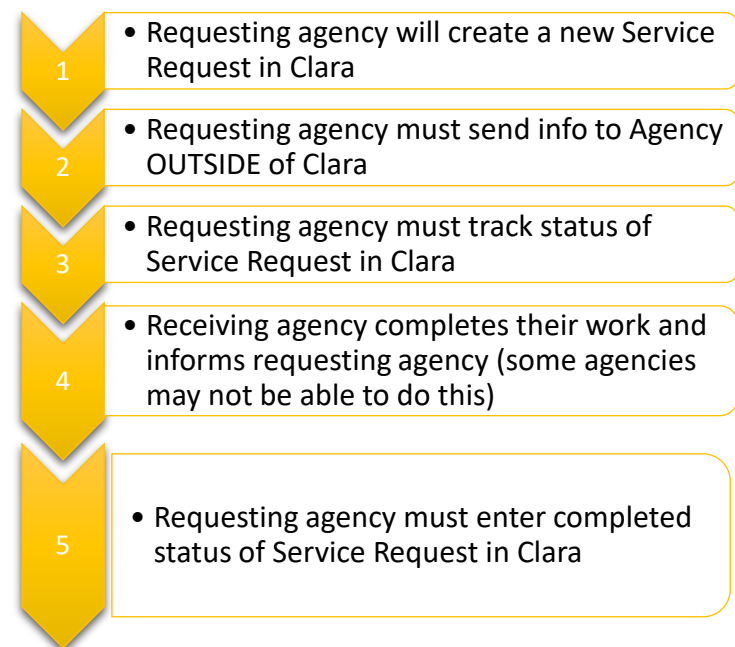
OVERVIEW OF REFERRALS VERSUS SERVICE REQUESTS

Start Referral → Search for Service → Request each Service → Clara initiates a Service Request → Agency approves Service Request → Agency "completes" Service Request → Referral is completed automatically

FOR AGENCY RECEIVING SERVICE REQUESTS THRU CLARA

1. • Receiving agency looks in Service Requests for new records

2. • Receiving agency changes status in Clara - Approve or Decline

3. • Receiving agency enters completed status in Clara once service hs been provided

4. • Receiving agency can see status throughout

FOR AGENCY MAKING SERVICE REQUESTS FROM AGENCY NOT IN CLARA

1. • Requesting agency will create a new Service Request in Clara

2. • Requesting agency must send info to Agency OUTSIDE of Clara

3. • Requesting agency must track status of Service Request in Clara

4. • Receiving agency completes their work and informs requesting agency (some agencies may not be able to do this)

5. • Requesting agency must enter completed status of Service Request in Clara

👤 Rogers, Nguyen

⚲ Female | DOB: 09/05/1999 | PWOG-0000571

Service Resources

Home Visits

Referral #4103125

REFERRAL STATUS	SERVICE REQUEST STATUS	SERVICE	LOCATION
✓ **Complete**	••• **Request Pending**	**Home Visits**	**Family Tree Relief Nursery**

ADDRESS

1005 NW Springhill Drive Albany, OR 97321

TRAVEL/LOCATION INFORMATION

When traveling from Corvallis on Highway 20: turns to SW 9th Ave, turn left onto the ramp to Lebanon/Eugene/Salem, Merge onto US 20 E/Pacific Blvd SE, turn right after Starbucks (on Left) Our facility is on Left side right after Boys and Girls Club on Hill

SERVICE DESCRIPTION

Relief Nurseries serve families with young children who are experiencing high levels of stress. Family Tree Relief Nursery provides high-risk families with intensive support through individualized case management. Risk factors include: poverty, high stress, depression, history of mental illness, lack of reliable transportation, single parent, criminal history, adult victim of child abuse, drug & alcohol history, unemployment, low self-esteem, limited education, anger issues, homelessness, and social isolation. Services include parenting education, support through home visits, group activities, resource referral. Children participate in therapeutic classrooms with low adult-child ratios, and families receive home visits that promote healthy parenting and child development.

INTAKE PROCEDURE

Call for information

FEES

None

ELIGIBILITY

At-risk families with a child under 6 years of age

SERVICE HOURS

Monday-Friday 9am-5pm

DOCUMENTS

Call for information

LANGUAGES

English, Spanish

AREA SERVED

Benton and Linn Counties

Main phone

541-967-6580

Care Plans

Care Plans are a new addition to the Pollywog program, and they allow us to work with an entire family unit at one time, and to see what has been done to serve them. When an application has been completed, and a family is enrolled in Pollywog, the Main Care Menu adds an additional column so that you can more easily see the Active Care Plans that you are working with:
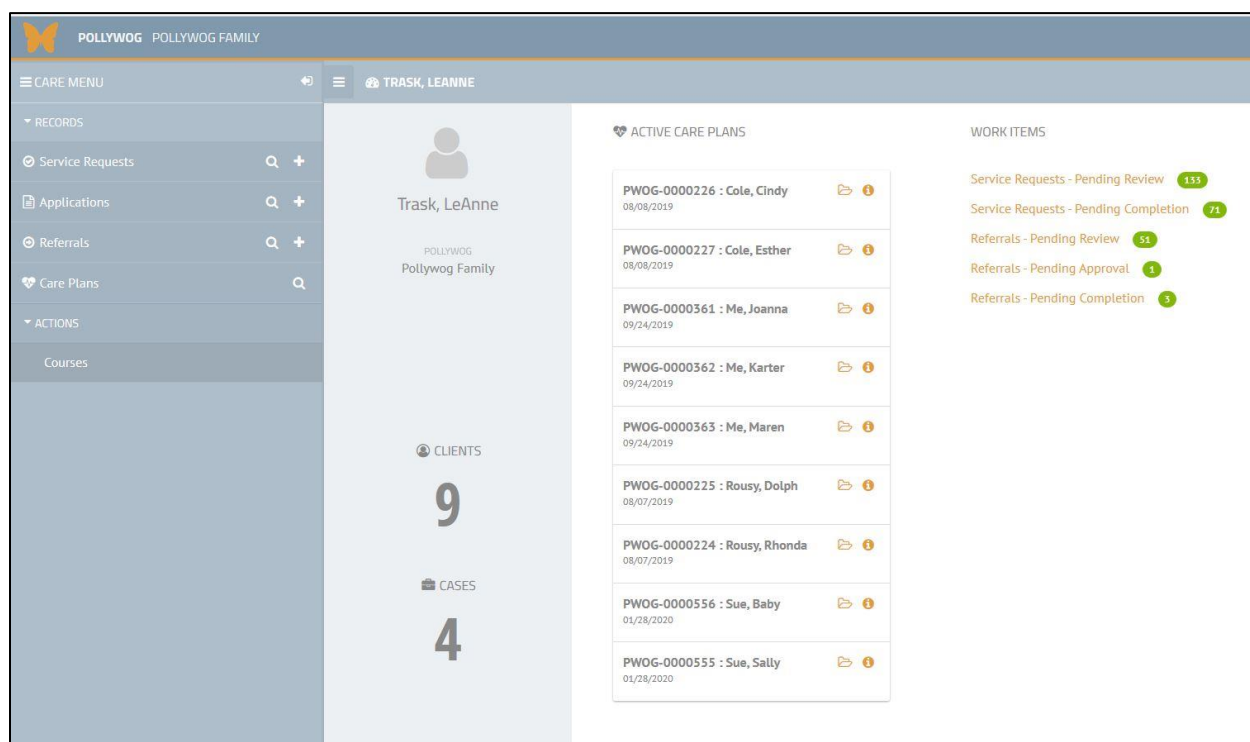
To work with open someone in a care plan, you may either select "Care Plans" from the Care Menu, , or you may select a client

from the Active Care Plans column in the center of the screen, by clicking on the file folder icon, .

You cannot add a Care Plan on this screen. Care Plans are created when an application is completed for a client and they are enrolled in Pollywog. You can search for a Care Plan on this screen by entering their name in the CLIENT field and pressing the SEARCH button. The screen displays student courses they have enrolled in, referrals made for them, and client activity notes.

When you select Care Plans from the Main Menu, and you have searched for your client, this is the screen that will appear:
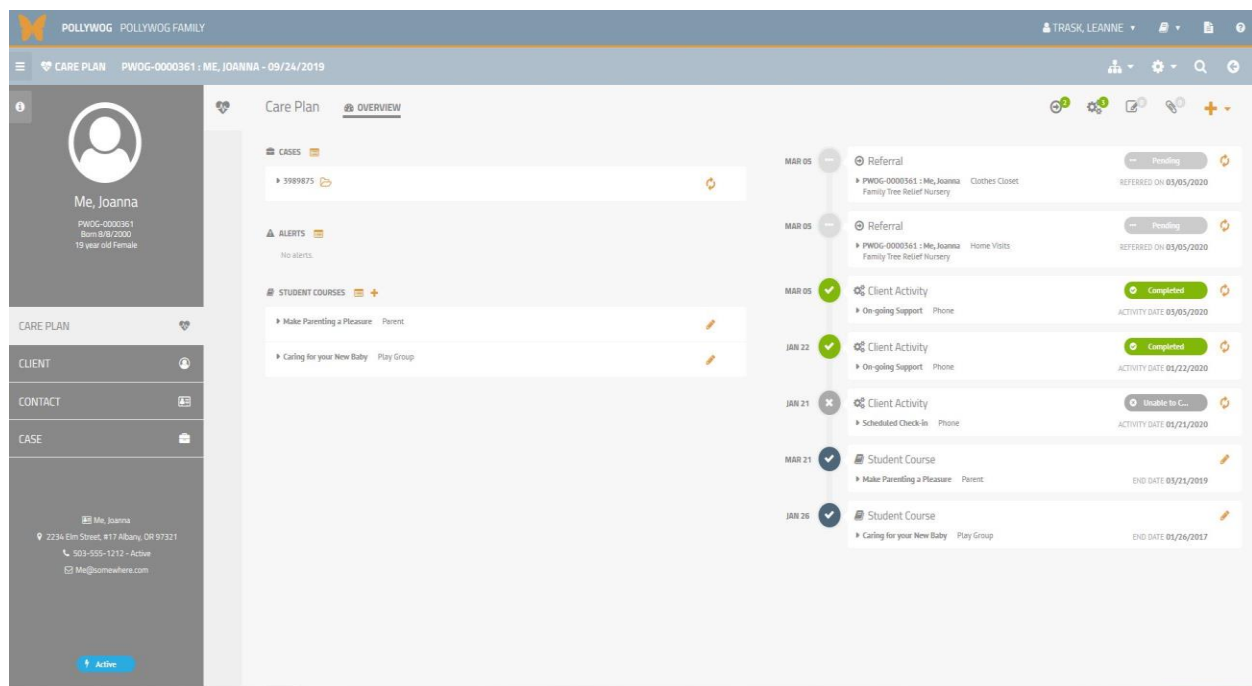
The left-hand side of the screen gives you basic information about your client: address, phone, email, date of birth, and Pollywog ID number. There are also four choices of how you wish to view the date: as a care plan (shown), as a client record, as a contact record, or as a case (which would include all members of the family that have care plans).

CARE PLANS

1. Student Courses:

   - This option lets you see all of the courses that this client has registered for since they have been a Pollywog member. (If you have a client who needs to register for a class, please contact the Pollywog staff to do that for you.)

2. Referrals:

   - On the right-hand side of the screen is a list of activities that this client has had, if any. For example, any courses they signed up for, any referrals that have been made for them, any client activities

notes that were included for this client are all located here, in chronological order.

- To add a new referral, click on the referral button, , on the upper-right menu ribbon. If there is a green circle with a number in it, that indicates how many referrals have been made for this client.
- When you have clicked on the referral button, you will be taken to a "summary" screen that shows all of the referrals, and the status of those referrals. There is also an add button, , in the upper right corner of the screen. Press that to begin adding a new referral.
- See page 10 of the User's Manual for detailed instructions on creating a referral. Start with STEP 1.
- When you have completed creating a referral, you will be returned to the referral summary screen. Click on the Care Plan icon to be returned to the Care Plan menu, .

3. Client Activities:

- It's important to document the activity that we have with clients, but using care not to include confidential information.
- To add a client activity record, click on the button on the upper right-hand menu ribbon. If there is a green button with a number in it, that indicates how many client activity records already exist for this client.
- When you click on the activity button, you will be taken to a "summary" screen that shows all of the activity recorded for this client.
- To add a new one, click on the button in the right-hand corner of the screen.
- A "New Client Activity" record will appear on the screen:
    - CLIENT ACTIVITY – select option from drop-down menu
    - ACTIVITY MODE – select option from drop-down menu
    - ACTIVITY DATE – should default to today's date, but can be changed, if needed.
    - ACTIVITY STATUS – select option from drop-down menu.
    - HOURS – select number from drop-down menu. Select the number of hours that the activity took to complete.
    - MINUTES – select option from drop-down menu. Select the number of minutes that the activity took to complete.

- COMMENTS - Enter any COMMENTS that are appropriate for this activity record.

- ASSIGNED TO - select your name from the drop-down menu.
- SAVE YOUR WORK – press the SAVE & CLOSE button.
- When you have completed creating a referral, you will be returned to the referral summary screen. Click on the Care Plan icon to be returned to the Care Plan menu, .

4. Client Notes:

- There is also a option on the menu ribbon for adding client notes, . As with Client Activity, you can enter additional pieces of information about a client for storage with their records.

5. Documents:
- On the menu ribbon is an additional icon, , for attaching documents to a clients record. For example, if you are doing ASQs for a child in Pollywog, you could upload those ASQs here so that other agencies would have access to them. Or, if you have a paper consent form for the client, this would be a good place to attach it.

Courses

On the Main Care Menu, at the very bottom of the menu, is an option for "Courses". This refers to the prenatal and parenting education classes that we register families for. Registration is only done by Pollywog staff; however, it is possible to go look at classes to see how many are registered for a particular class. (It is much easier—and preferable—to review what classes are available by going to the Pollywog website.)

VIEWING COURSES

1. From the Main Care Menu, under ACTIONS, click on COURSES.

2. From the Index Menu, click on COURSES again.

3. All of the courses currently available will now be displayed on the screen, as well as a search box, if you need to look for a specific course. Click on the NAME field in the SEARCH COURSES box (on the left-hand side of the screen), and type in the name of the course you are teaching.

4. Click on the **Q Search** button.

5. Clara will process for a moment, and then all of the courses with the name you selected (that are active) will display on the right-hand side of the screen.

6. Close the COURSE SEARCH box by clicking on the ⬅ button.

7. Scroll down to the course you wish to visit, and click the **📂 Open** button.

8. On the left-hand side of the screen you are now viewing the course information: event type, course name, venue, start and end dates, session start time and number of sessions in class.

9. On the right-hand side of the screen you are now viewing the list of students who have registered for the class. If you click on the name of the person in the list of attendees, their contact details will be displayed.
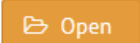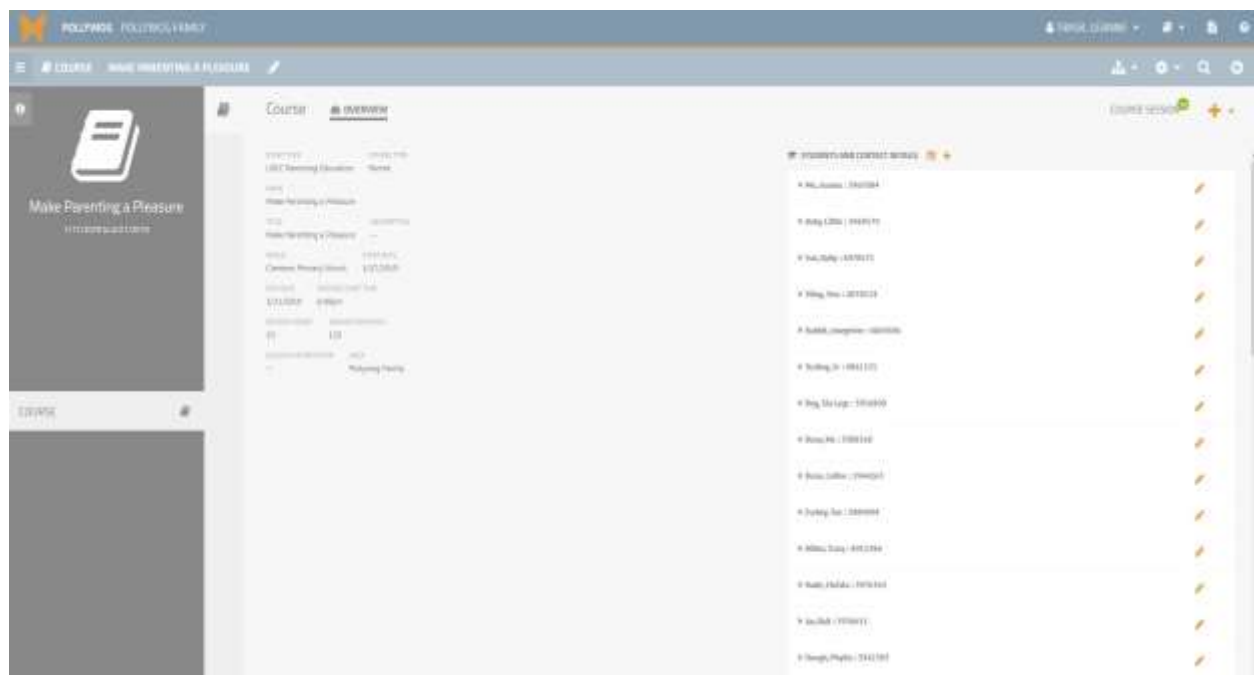
- If there is a green button with a number in it in the upper right-hand corner of the screen, this indicates how many sessions of the class there are.

PRINTING A COURSE ROSTER

1. On the right-hand side of the screen you are viewing student information – who is in the class. To print out a class roster, click on the ⚙ ▾ button and select PRINT from the drop-down menu.

2. The Class Roster is now displayed on the screen, including course information, individual session information, students in the class, and contact information for each student. Press PRINT and the Roster will print out.

3. To download a class roster, click on the ⚙ ▾ button and select DOWNLOAD from the drop-down menu.

4. Clara will process for a moment, and then you will be taken to a screen showing a list of files you have previously downloaded (including the file name, date and time), and the file that is ready for you to download will be listed at the top of the page. Click on the name of your course to download your roster.

5.	A message will appear on your screen asking if you wish to open it or save it. If you open it, it will immediately appear on your screen as an Excel spreadsheet. If you save it, it will save in your DOWNLOAD directory on your hard drive.

6.	As you review your Excel spreadsheet, you will see that the top of the document contains information about the course, including event type, venue, course type, and number of sessions. The last section is student contact details, including phone numbers, email addresses, and mailing addresses. (If you are sending out emails to your students, highlight the column containing the email addresses, and then copy and paste those emails directly into your email software address field—we recommend using the BCC address field for confidentiality!—and the email addresses will drop right into your email.

TAKING ATTENDANCE

1.	From the Main Menu, under ACTIONS, click on COURSES.

2.	From the Index Menu, click on COURSES again.

3.	Click on the NAME field in the SEARCH COURSES box (on the left-hand side of the screen), and type in the name of the course you are teaching.

4.	Click on the [🔍 Search] button.

5.	Clara will process for a moment, and then all of the courses with the name you selected (that are active) will display on the right-hand side of the screen.

6.	Close the COURSE SEARCH box by clicking on the [◀] button.

7.	Scroll down to the course you wish to visit, and click the [🗁 Open] button.

8.	On the left-hand side of the screen you are now viewing the course information: course type, event type, venue, start date, end, date, session count, session duration, course audience type, and venue. If this information is distracting to you, use the SLIDE BUTTON - [◀] and remove it from view.

9.	You should now be viewing a list of students who are enrolled in the class, and in the upper right-hand side of the screen you will see this button:

Course Sessions
10

10.	If there is a green button with a number in it, this indicates how many sessions of the class there are. For example, if this is the "All About Breastfeeding"

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course, there is only going to be a "1" in the bubble because it is one session of the class. For a Childbirth Preparation class, there will be four sessions showing.

11. In order to take attendance for one of the COURSE SESSIONS, you need to know which session number you are on. For example, if this is a Childbirth Preparation class, four sessions will be showing, and you might be in week three of the class, so you should scroll down through the course sessions until you find the correct session, and click on the [▷ Open] button.

12. Again, on the left-hand side of the screen an INFORMATION box opens with details about this session: name of course, course venue, start date, end date, etc. Use the button to close it out of the way.

13. Click on the [⚙ ▾] action button on the menu bar in the upper right-hand side of the screen. When the drop-down menu appears, select TAKE ATTENDANCE from the menu choices.

14. Click on the orange ↻ attendance arrow in front of a student name:
    • Tapping on the orange arrows ONCE turns the student name bubble green and indicates that the student was present in class.
    • Tapping on the orange arrows TWICE turns the student name bubble red and indicates that the student was not present in class.
    • Tapping on the orange arrows THREE times turns the student name bubble gray again and indicates that you don't know if they were in attendance or now.

15. At the bottom of the screen is a [⊘ Complete Attendance & Close] button. Click on it to save your attendance record and return to the main course menu.

OPTIONAL: There two training tutorial videos on YouTube that can also be accessed for additional instructor training.

View at: https://www.youtube.com/channel/UCwWdaTY50dudVli7tYDmttw

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