GUIDE TO THE OKLAHOMA SYSTEMS OF CARE WEBSITE AND YOUTH INFORMATION SYSTEM
# Table of Contents

Getting Started Using the Oklahoma Systems of Care Website ................................................................. 2  
Accessing the Oklahoma Systems of Care Website ..................................................................................... 2  
Contacting the Oklahoma Systems of Care Website Helpdesk ................................................................. 3  
Editing Your Profile ....................................................................................................................................... 4  
Managing Oklahoma Systems of Care Website Users .................................................................................. 7  
Using the Site Menu ...................................................................................................................................... 9  
Entering Referral Information / Creating a New Case ................................................................................ 10  
Entering a New Enrollment .......................................................................................................................... 14  
Viewing, Entering, and Editing Client Information ..................................................................................... 16  
  To Edit an Enrollment Record .................................................................................................................. 18  
  To Add a New Assessment ....................................................................................................................... 20  
  To Edit an Existing Assessment ............................................................................................................... 22  
  To Add a New Wrap Event ....................................................................................................................... 22  
  To Edit an Existing Wrap Event .............................................................................................................. 24  
  To Add a Flex Fund Expenditure .............................................................................................................. 25  
  To Exit an Existing Flex Fund Expenditure .............................................................................................. 26
Getting Started Using the Oklahoma Systems of Care Website

This guide is designed to provide Oklahoma Systems of Care website users the information needed to navigate the website. The guide gives step-by-step instructions on how to log in to the Youth Information System (YIS); enter and edit data in the YIS from referral forms, enrollment forms, and assessment forms; add and edit YIS users; and screen clients using the Ohio Scales and GAIN Short Screener.

Accessing the Oklahoma Systems of Care Website

Enter the Oklahoma Systems of Care website address (systemsofcare.ou.edu) into your browser and you will be taken to the page below. From this page, you can log in to the YIS, screen clients using the Ohio Scales and GAIN Short Screener, and contact the helpdesk.

To log in to the YIS, click YIS.

Enter your login and password and click the Login button. If you do not have a login and password or if you have forgotten your login and password, click on the CONTACT US button or email the helpdesk directly at yiseteam@ou.edu (see Contacting the Oklahoma Systems of Care Website Helpdesk for more information).
When logged in, you can edit your profile, add or edit YIS users, and access the YIS. You can also screen clients using the Ohio Scales and GAIN Short Screener and contact the helpdesk.

**Contacting the Oklahoma Systems of Care Website Helpdesk**

You can contact the Oklahoma Systems of Care website helpdesk from the website or by sending an email directly to the helpdesk. Email the helpdesk directly at yiseteam@ou.edu. To contact the helpdesk from the Oklahoma Systems of Care website, click on **CONTACT US** from the home page.
Type in your name, your email address, and a description of your problem/comment/suggestion. Click **Submit**.

The helpdesk will respond to your question/comment/suggestion as soon as possible.

**Editing Your Profile**

To edit your Oklahoma Systems of Care website profile you must be logged in to the Oklahoma Systems of Care website. Once logged in (see [Accessing the Oklahoma Systems of Care Website](#) for more information), click **MANAGE** from the menu and select **EDIT PROFILE**.
All your information will be pre-populated on the screen. From this screen, you can edit your name, email, and phone numbers. You can also change your password and username.

To change your username, enter the username you would like to use in the *Username* field and click **Check**. You will receive a message that indicates whether or not that username is currently in use. If the username is unique, click **OK** and **Save Changes** and your username will be changed. If the username is not unique, choose a different username. Continue until you receive a message stating that the username is unique and click **OK** and **Save Changes**.

To change your password, select **CHANGE PASSWORD**.
Enter your current password and enter the password you would like to use in *New Password*. Click *Set New Password*.

To change your email, enter the email address you would like to use in the *Email* field and click *Check*. You will receive a message that indicates whether or not that email address is currently in use. If the email address is unique, click *OK* and *Save Changes*. If the email address is not unique, enter a different email address. Continue until you receive a message stating that the email address is unique and click *OK* and *Save Changes*.

To change your name or phone numbers, enter the new information you would like to use in the appropriate fields and click *Save*. 
Managing Oklahoma Systems of Care Website Users

To manage Oklahoma Systems of Care website users you must be logged in to the Oklahoma Systems of Care website and have administrative privileges. Once logged in (see Accessing the Oklahoma Systems of Care Website for more information), click MANAGE from the menu and select MANAGE STAFF.

From this screen, you can edit a user’s information and add a new user.

To edit an existing user’s information, enter their name (first and/or last) or username in the Search field. Click the box next to Include Inactive Staff to find a staff member that is no longer active. Click Search. Locate the user that you want to edit and click on Edit next to their name.
Make the necessary changes to the *Edit Staff* screen and click **Save**.

To add a new user, click **Add New Staff** from the *Staff Management* screen.
Enter all the information for the user and click **Save**.

Using the Site Menu

All of the functions of the YIS can be accessed using the site menu. To access the site menu, click on the **Menu** button on the top left of the screen.

The site menu will pop out. From this menu, you can search for a client, access and edit records for an existing client, and enter data for new clients. You can also access reports and forms and change the agency and/or site you are working in (you can only access agencies and sites for which you have been given permission). The site menu can be accessed from any screen.
To minimize the site menu, click on the arrow at the top right of the menu.

**Entering Referral Information / Creating a New Case**

To enter referral information into the YIS, click the New Case link from the **YIS Operations** screen or select the **New Case** option from the site menu.

You will be directed to the **Youth Information** section of the **New Youth Referral** screen.
Complete the form and select **Next**. Site, referral source, referral date, date of birth, first name, last name, and gender are required fields – you will not be able to continue until these fields are complete.

Dates can be entered by entering the date manually in the format MM/DD/YYYY or by clicking on the calendar icon and choosing the date from the calendar. To access a calendar from a previous month or year, click on the left arrow(s) or click on the month/year on the displayed calendar. Clicking on the arrow(s) will allow you to go back a month (or 3 months) at a time. Clicking on the month/year on the displayed calendar will open a box showing all months and several years from which you can choose. To go farther back in years, click on the left double arrow. From this box, you can select the month and year you wish to view. Then click OK and the calendar for the selected month and year will appear. Select the day you wish to choose and it will appear in the **Date** field.

Once you have entered all of the information on this screen, click the **Next** button.
The YIS will search the database to determine whether or not the information entered matches a youth who is currently in the system. If there are matches, the following screen will appear. Review the possible matches. If your client is enrolled at another site, you will not be able to enter referral information for them. You will need to contact the site administrator to proceed. If none of the possible matches are for your client, click **Create Case for New Client**.

You will be directed to the **Additional Information** section of the **New Youth Referral screen**. Fill out the fields on this page as completely as possible. Address, city, county, and state are required fields. You will not be able to continue until these fields are complete. Click **Next**.
You will be directed to the **Involved Organizations** section of the *New Youth Referral* screen. Fill out the fields on this form as completely as possible and click **Save**.

You will get a message stating that you have successfully added the client. You can repeat the process with another new referral by clicking the **New Referral** button from this screen. If you would like to enter enrollment information for this client, click **Enroll Client**.
Entering a New Enrollment

If you have just completed the referral for the client and wish to enroll them, select **Enroll Client** from the *New Referral* screen.

You will be taken to the *Client Services* screen where you can enter enrollment information for the client. Once you have completed the form, click **Save**.

If you are entering a new enrollment but the referral information was entered previously, you can enroll the client by selecting Enrollment from the site menu or you can select Enrollment from the YIS Operations screen.
You will be directed to the Select a Youth screen. You can search by the youth’s name, SOC ID, Medicaid number, or social security number. Enter your search criteria in the Search field. Click Search.

When you are presented with your search results, select the youth you wish to enroll by clicking anywhere on the row associated with that youth.

You will be taken to the Enrollment Summary screen. Click on Enroll Client.
You will be taken to the *Client Services* screen where you can enter enrollment information for the client. Once you have completed the form, click **Save**.

Viewing and Editing Client Information

From the site menu, click **Select a Youth**. (You can also view or edit a client’s information by clicking on **Edit Client Info** from the *Enrollment Summary* page.)

You will be directed to the *Select a Youth* screen from which you can search for the youth by the youth’s name, SOC ID, Medicaid number, or social security number. Enter your search criteria in the *Search* field and click **Search**.
Find the client you want and click anywhere on the row associated with that youth.

You will be directed to the *Client Summary* page. From this screen you can view, add, and edit demographics, referral information, caregiver information, enrollment information, Ohio Scales scores, service events, and flex fund expenditures.
To Edit an Enrollment Record

From the Client Summary page, click on **Edit Enrollment Record**.

You will be taken to the Enrollment Summary page.
From this page you can choose several operations:

- **Edit Client Info:** Change demographic, caregiver, and identifier information;
- **Edit Case:** Change information about systems involvement, diagnoses, permissions to contact;
- **Change Service:** Change health home status, service level/type, special projects;
- **Discharge:** Record date and circumstances of youth leaving service.

For each option, you will be directed to the appropriate section of the Enrollment process for all but the Discharge option, which has its own page. Make the necessary changes and click **Save** at the bottom. The screenshot below illustrates the page for the Change Service option.
To Add a New Assessment

From the Client Summary page, click on **Add Worker Assessment**, **Add Caregiver Assessment**, or **Add Youth Assessment** under Assessments. You can also add a new assessment by clicking on the Assessments option from the site menu.

Select the assessment period (e.g., baseline, 3 month, 6 month) from the dropdown menu. Enter the date of the assessment, and select the age group if you are completing a worker assessment or a youth...
assessment. For the caregiver assessment, select who completed the form from the dropdown menu and enter a description, if necessary.

The menu options for the assessment will change, depending on which version of assessment you select and the age of the youth. See chart below.

To enter Ohio Scales Problem data, click on **Problem** from the menu. Enter the response for each item by selecting the appropriate response options from the dropdown menus. Continue entering data for each section. Once you have finished entering data for all sections, click **Save Assessment**.
When you’ve saved the assessment, you will receive a message letting you know your assessment was saved. You can edit an existing assessment, add a new assessment, go back to the Client Summary page, or select a different option from the site menu.

**To Edit an Existing Assessment**

Navigate to the *Client Summary* page or click on Assessments from the site menu. Select the assessment you wish to edit.

Make the necessary changes to the assessment. Select **Save Assessment**.

**To Add Risk Factors**

From the *Client Summary* page, click on **Add Risk Factors** under Assessments. You can also add risk factors by clicking on the Assessments option from the site menu.
Complete the form and select **Save**.

To Add a New Service Event

From the *Client Summary* page, click on **Add a New Event** under *Service Events* or select Service Events from the site menu.
Complete the form and click **Save**.

To Edit or Delete an Existing Service Event

Navigate to the *Client Summary* page or click on Service Events from the site menu. Select the event you wish to edit.
Make the necessary changes and click **Save Changes** or click **Delete Event**.

To Add a Flex Fund Expenditure

From the **Client Summary** page, click on **Add a New Expenditure** under **Flex Fund Expenditures** or select Flex Funds from the site menu.

Complete the form and click **Save Expenditure**.
To Exit an Existing Flex Fund Expenditure

Navigate to the Client Summary page or click on Flex Funds from the site menu. Select the expenditure you wish to edit.

On the Flex Funds Expenditure screen, make the necessary changes and click Save Expenditure.

Accessing and Printing Forms

The latest version of all OKSOC forms will be available through the YIS. To access them, either click the Forms button on the site menu, or click the PRINTABLE FORM hyperlink on the relevant YIS screen. For
example, to access the enrollment form, you can click on the PRINTABLE FORM hyperlink on the 
*Enrollment Summary* screen.