



ART 2.2

FEATURE ENHANCEMENT LIST

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ART 2.2 FEATURE ENHANCEMENT LIST

Bowman Systems is pleased to announce the release of ART 2.2.

This release unveils a new Service Transaction universe and gives the user the ability to change providers while in ART.

REPORT PROVIDER

Change Reporting Provider within ART

- ▶ Provider Display
 - The name of your current provider will be displayed at the top-left corner of the InfoView screen, below your login name.
- ▶ Change Provider
 - To change the provider, open a popup window by clicking on the provider name. A list of available providers will be displayed. Click on a provider name to switch to that provider. The provider list is built from the “Enter Data As” list in *ServicePoint*. Queries run from this point forward will be based on the security for the newly selected provider.
- ▶ Notes
 - As in *ServicePoint*, a System Administrator II cannot change providers (the provider name in ART will not be clickable).
 - As in *ServicePoint*, if the user’s access level is higher than Case Manager II, it will be temporarily reduced to Case Manager II when the user switches from their default provider.
 - If the user changes their “enter data as” provider in *ServicePoint* it will not change in ART. The two settings are separate, and a change in one area is not automatically reflected in the other area.
 - When a user logs into *ServicePoint*, and opens ART, the user will be set to their default provider.
 - Changing providers will cause an open report to be reset, and any unsaved changes will be lost.
 - Scheduled reports will execute using the default provider.
 - The default provider WILL NOT be changed when you log out of the system.
 - Your default provider WILL be reset after each ART build.

BENEFIT: Changing the provider in ART allows a user to create reports for multiple providers without the requirement of signing on as a user assigned to that provider. This flexibility will greatly simplify reporting across a community of providers.

ART UNIVERSES

Service Universe

- ▶ The Service Universe is a new transaction-based universe similar in concept to the entry/exit universe, but based around services rather than entry/exits.
 - Service Transactions Category
 - All queries in the service transaction universe are based on this category, much like the “Entry Exit” category in the Entry/Exit universe, or the “Client” category in the Client Universe. All other tables in the Service Universe are related (i.e., joined) to this table. Clients without services will not display in any Service universe reports.
 - Need Category
 - The Need Category contains data about the need for which the service was created. It is identified by the “need_id” field of the service record. One need is returned for each service. Needs that do not have associated services will not display in any Service universe reports.
 - Client Category
 - The Client Category contains data about the client to whom the service applies. It is identified by the “client_id” field from the service record. One client is returned for each service. Clients who do not have a service record will not display in service universe reports.
 - Household Category
 - The Household Category contains data about the household to which the service applies (if any). It is identified by the “family_id” field of the service record. A maximum of one household is returned for each service. If the “family_id” field is null, no household will be returned for that service. Households that do not have associated service records will not display in any service universe reports.
 - Household Relationship Category
 - The Household Relationship Category contains data about the relationship that ties the client and household members served. Normally, no or one household relationships will be returned for each service. However, if there are inactive household relationships that also match the criteria, they will also be returned. If returning inactive records is not desired, the report designer must create a query filter to eliminate inactive records (i.e., “Household Inactive = No”).
 - Goals Category
 - For each service, the Goals Category contains data about client goals that were set by the service provider and received the service during the service transaction period (i.e., between its “start date” and “end date”). If the service transaction does not have a service provider or a start date (for example, if it’s a referral for which no service has been provided), no goals will be returned for the service. Goals that were not established during the service period will not display in any service universe reports.
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- Action Step Category
 - For each goal associated with a service (per the definition of the Goals category above), the Action Step Category returns data about all action steps attached to the goal that were set by the service provider during the service transaction period. Action steps that were not set during the service period will not display in any service universe reports.
 - Case Notes Category
 - For each goal associated with a service (per the definition of the Goals category above), the Case Notes Category returns data about all case notes attached to the goal that were set by the service provider during the service transaction period. Case notes that were not set during the service period will not display in any service universe reports.
 - Entry Exit Category
 - The Entry Exit Category contains data about all entry/exits that were in effect for the client and service provider during the service transaction period. If the service transaction does not have a service provider or a start date (for example, if it's a referral for which no service has been provided), no entry/exits will be returned for that service. If no service transactions fall between the entry date and exit date, the entry exit will not display in service universe reports. Rewrite: Only entry exits that have dates that fall within the service transaction period will be returned.
 - ROI Category
 - The ROI Category contains data on all ROIs that were in effect for the client and service provider during the service transaction period. If the service transaction does not have a service provider or a start date (for example, if it's a referral for which no service has been provided), no ROIs will be returned for the service. If no service transactions fall between the ROI start and end dates, the ROI will not display in any service universe reports.
 - Infractions Category
 - The Infractions Category Returns data about all client infractions for the client and service provider in which the ban period overlapped with the service transaction period. If the service transaction does not have a service provider or a start date (for example, if it's a referral for which no service has been provided), no client infractions will be returned for the service. If no service transactions fall within the ban period of a client infraction, that infraction will not display in service universe reports.
 - Assessment Category
 - An assessment will only appear if one or more of the questions it contains are marked "Reportable in the Service Transaction Universe of the Advanced Reporting Tool" on the question administration page in *ServicePoint*. A minimum *ServicePoint* version has not been set yet for this functionality.
 - Assessment Question Category
 - Each (non-subassessment) question marked reportable in *ServicePoint* generates two objects in the service universe – one for the client's most recent answer as of the start date of the service, and one for the most recent answer as of the end date
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of the service. If the service does not have an end date, it is considered ongoing, and the current date is used as the effective date for the “end” objects.

- Sub Assessment Question Category
 - Each question with a data type other than “money” appears only once in the subassessment category (rather than once for service start and once for service end). Adding these objects to a query will return all subassessment records that were effective at any time during the service period (based on the subassessment’s start and end date, and the service record’s start and end date). Questions with type “money” (like “Last 30 Day Income” in the “Monthly Income” subassessment) generate two objects, one for the value at service start, and one for the value at service end. This behavior allows you to report on changes in income between two points in time. The objects “Effective at Service Start” and “Effective at Service End” return Yes/No based on whether or not a subassessment record was in effect at the start date or end date of the service period. This makes it easier to report on changes (for example, whether an income source was lost or gained during a service period).

BENEFIT: The Service Transaction Universe allows easier creation of reports based on assessment values at the time of service.

Client Universe

- ▶ Provider Detail Fields
 - The following fields were added to the Client Universe.
 - Provider CoC Code
 - Provider Program Type Code
 - Provider Area
 - Provider County
 - Provider City
 - Provider Legal Status
 - Each of the provider details are available for the following transaction types:
 - Actionstep Provider
 - Casenote Provider
 - Entry Exit Provider (Inner/Outer)
 - Need Provider (Inner/Outer)
 - ROI Provider (Inner/Outer)
 - Service Provide Provider (Inner/Outer)
 - Service Referto Provider (Inner/Outer)
 - Infraction Provider (Inner/Outer)

BENEFIT: These fields allow report designers to group service providers on applicable demographic and geographic data.

- ▶ Quick Calls Metadata
 - The following metadata fields were added to the Quick Calls category:
 - Quick Call Provider Creating
 - Quick Call User Creating
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- Quick Call Provider Updating
- Quick Call User Updating

- ▶ Case Worker
 - A Case Worker category was added to the Client Universe. The following fields are included:
 - Provider
 - Name
 - Title
 - Phone Number
 - Email Address
 - Date Started
 - Date Ended
 - Date Started
 - Date Updated
 - Provider Creating
 - User Creating
 - Provider Updating
 - User Updating

BENEFIT: These fields facilitate Quick Call and Case Worker reporting.

- ▶ Count Client Uid
 - This field allows the user to create results similar to *ServicePoint's* Duplicate Client Report, which is keyed off of the Client Unique Id field.

- ▶ PD Join Fix
 - Client Universe/ Service(Outer) Service Household Id is now set as an outer join.

Entry/Exit Universe

- ▶ Provider Detail Fields
 - As described above in the Client Universe.

- ▶ Quick Calls Metadata
 - As described above in the Client Universe.

Provider Universe

- ▶ *ServicePoint* 4.03 I&R Changes
 - The following fields were incorporated into the Provider Universe to reflect the fields now available in *ServicePoint* as of the *ServicePoint* 4.03 I&R release.

 - ▶ Providers Category
 - Person in Charge
 - Person in Charge Title
 - Person in Charge Email Address
 - Person in Charge Phone Number
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- Person in Charge Phone Description
 - Employer ID
 - Year of Incorporation
 - Fax #1 (renamed from “Fax”)
 - Fax #2
 - Resource Contact Person
 - Resource Contact Title
 - Resource Contact Email Address
 - Resource Contact Phone Number
 - Resource Contact Phone Description
 - Resource Contact Notes
 - Contact Person #1
 - Contact Person #1 Title
 - Contact Person #1 Email Address
 - Contact Person #1 Phone Number
 - Contact Person #2
 - Contact Person #2 Title
 - Contact Person #2 Email Address
 - Contact Person #2 Phone Number
 - Facility Type
 - Capacity Type
 - Service Capacity
- Provided Services category (subcategory of Providers)
 - Type
 - Out of Resource
 - Licensing/Accrediting category (subcategory of Providers)
 - License Type
 - Accrediting Body

BENEFIT: Synchronizes ART with the *ServicePoint* 4.03 I&R release.

- Correct Bed Counts
 - Currently a bed will not be marked as occupied unless the Client exited the Service. The change eliminates this requirement. The logic is: Return 1 where ShelterItem = 1 AND service start <= Prompt(Date) AND (service end > Prompt(Date) OR service end ISNULL).
- Merge Fields
 - Provider + Uid
 - User + Uid

BENEFIT: More flexibility in merging dimensions from the Client Universe into the Provider Universe.

- PD Join Fix
 - Users.Users Dataentry List. Enter Data As Provider is now an outer join.
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