LOCAL POLICY BULLETIN #2024-06

Effective Date: April 3, 2025

ATLAS PARTNER PORTAL

PURPOSE

This policy establishes the requirement for all contractors and subrecipients to utilize the ATLAS Partner Portal (hereafter "the Portal") for referrals, tracking service outcomes, and collaboration. To ensure all is designated as the official platform for tracking, managing, and reporting client referrals among service providers.

SCOPE

The Workforce Development Board of Ventura County (WDBVC) and its contractors and subrecipients.

POLICY AND PROCEDURES

All contractors and subrecipients under the WDBVC must use the Portal for managing and tracking client referrals. The Portal will serve as the primary system for inter-agency communication regarding service coordination, ensuring a streamlined and efficient referral process. Failure to comply with this requirement may result in corrective action, including potential funding consequences.

1. Access and User Roles

a) Each contractor and subrecipient must designate at least one Partner Admin to oversee Portal activities.
b) Providers must register their organization on the Portal by completing the New Partner Registration process.
c) Additional users (e.g., System Users) must be added by the designated Partner Admin within the Portal.

2. Referral Management

a) All client referrals must be submitted through the Portal using the standardized referral form.
b) Contractors and subrecipients receiving referrals must acknowledge receipt within three (3) business days.
c) Referral status updates (e.g., "Accepted," "Individual Non-Responsive," and "Rejected") must be recorded in the Portal.
d) Contractors and subrecipients must document outcomes and follow-ups within the Portal to ensure accountability and data integrity.

3. Compliance and Monitoring

a) WDBVC and One-Stop Operator staff will conduct periodic audits to ensure compliance with Portal usage requirements.
b) Contractors and subrecipients should generate reports from the Portal to review referrals.
c) Non-compliance with this policy may result in technical assistance, corrective action, or potential suspension of funding.

4. Training and Support

a) The WDBVC or the One-Stop Operator will provide initial training for contractors and subrecipients on Portal use.
b) Contractors and subrecipients must ensure all relevant staff are trained in Portal procedures.

5. ATLAS Network Standards

Key Network Standards to which all in-network partners are held include the following:

a) The maximum length of time partners should take to respond to a referral- within two (2) business days.
b) How many attempts should be made to contact an unresponsive client before closing a case or referral- Three (3) attempts over ten (10) business days.
c) How regularly organizations should review/update their organization and program information- Once a quarter/as needed.
d) How regularly organizations should update their user information when users leave the organization/should no longer have access- Within two business days of change in user access.
e) The maximum length of time users should take to close clients cases once they know the outcome- Within two (2) business days of resolution.
f) The maximum length of time users should take to add the first note to the client's case after the case is created- Within seven (7) business days.
g) The maximum length of time a case should be open without a note being added. Otherwise, the case should be closed with a resolution- No more than three (3) months.

6. Script for Calling a Referral

Purpose: *A consistent way to introduce ourselves to a customer based on a referral. Most referrals may be coming from Ventura County WORKS.*

a) **When you receive a referral and call the individual, start by saying:**
Hi, my name is [name], *and I am calling because you recently spoke with someone at the Ventura County WORKS or submitted a form online. You were looking for services to help you with* [fill in whatever your agency does regarding the referral]. *I am with* [agency name]. *Ventura County WORKS referred you to us because we can help you with* [whatever the referral was for]. *Are you available to talk now?*

b) **Then proceed with your regular conversation/process**

7. Reporting Issues
The WDBVC and the One-Stop Operator must be notified of any prolonged system outages affecting service delivery.

ACTION

Bring this directive to the attention of all appropriate staff.

INQUIRIES

Inquiries regarding this policy can be addressed to the WDBVC at 805-477-5306.

/S/ Rebecca Evans, Executive Director
Workforce Development Board of Ventura County

ATTACHMENTS:

Attachment I - ATLAS Portal User Guide

CommUNITY Conextions Partner Portal

USER GUIDE

August 2024

ATLAS

Table of Contents

The CommUNITY Connextions Partner Portal is a critical component to any service delivery flow to address the ongoing needs and challenges of your customers.
From here forward the CommUNITY Connextions Partner Portal will be referred to as the portal.

The portal is a quick access tool you can utilize to identify partner agencies to connect customers to needed resources, and a closed-loop referral system. Also, the portal encourages collaboration and engagement from the partner network as a whole. This guide walks you through step-by-step how to access the portal, submit and manage referrals, and much more!

The portal has three (3) main functionalities to the system the consist of:

- **Available Resources & Services:**
  - Know what partner services are available in your Partner Network.
  - Partners maintain and update their own service profile page, so information is relevant and up to date.
  - Key word search services, learn about funding availability, partner locations, application process, eligibility criteria all within one platform.
- **Referral Connection & Communication:**
  - Real time referral to Partner Network agency to address customer's needs.
  - Stay connected via four-way referrals, as the referring agency, receiving agency and Super Admin(s) simultaneously receive the referral allowing for accountability, tracking & follow up from all related parties.
  - Referrals are automatically converted to a PDF & electronically stored with the date/timestamp of referral execution.
  - Referrals are housed and stored in a secured online platform, which is the COMMUNITY CONNEXTIONS Partner Portal.
- **Tracking Results:**
  - Issuance of quality referrals.
  - Ability to track referral outcomes/impact.
  - Track referrals by related Partner Organizations, User, & Service Type.
  - Export Referrals Report.

1: Main User Levels

It is important to note that not every user will have the same level of access privileges. There are three (3) different user access levels. It is important that the user is aware and has knowledge of which user level they fall under prior to accessing the portal.

Super Admin: this user level is created and established by the ATLAS Support team. This user level oversees the entirety of the portal.

If a user is needing to establish a Super Admin account, the user must follow the steps below to create the account and gain access to the portal:

1. An already existing Super Admin of the portal will need to go to the main login page of the portal.
2. Click on the ***Staff*** option from the Staff Menu, then select ***All Staff*** from the submenu.
3. Click the ***Add Staff*** button, then fill in the following information:
   a. **Full Name:** defined as entering the users First and Last Name

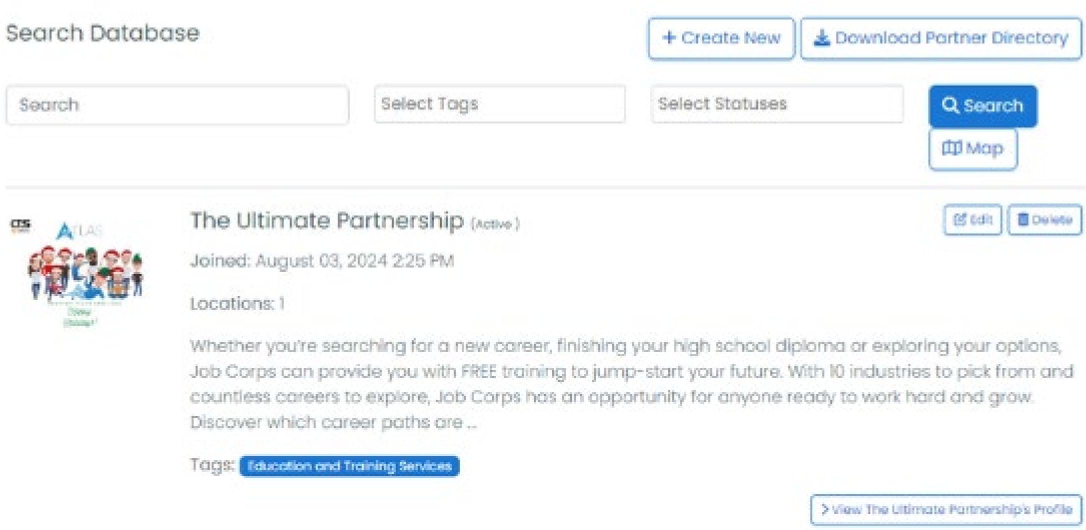
b. **Email Address:** defined as entering the email address of the user. This will become the user's username and will be the email address that receives notifications from the portal.
c. **Current Position:** defined as selecting the ***Admin*** option from the dropdown menu.

The link below walks through the steps outlined above: [Video #01]

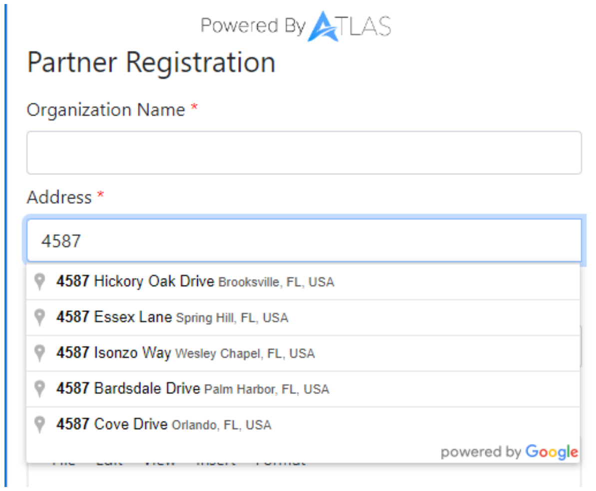
<u>Partner Admin</u>
If a user is needing to establish a Partner Admin account, the user must follow the steps below to create their login credentials and begin building out their partner profile page:

Partner Admin Option 1: If the Partner Admin account that is needing to be created, and the overall partner account is needing to be created as well, then the user will complete the following steps:

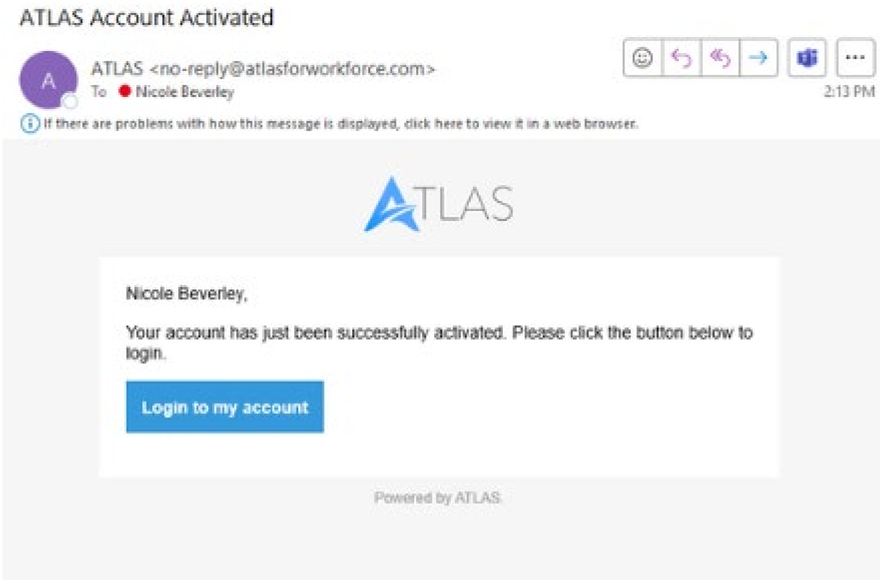
1. Go to the main login page of the portal.
2. Click the green ***New Partner Registration*** button and fill in the following fields:
   a. **Organization Name:** defined as the name of their partner organization. The organization name that is entered in this field is the name that will appear within the portal's partner database and be viewed by all users.



   b. **Address:** defined as the physical (brick & mortar) street address of the partner organization. You <u>MUST</u> make your address selection from the dropdown menu that is powered by Google. See image below for reference.

i. 

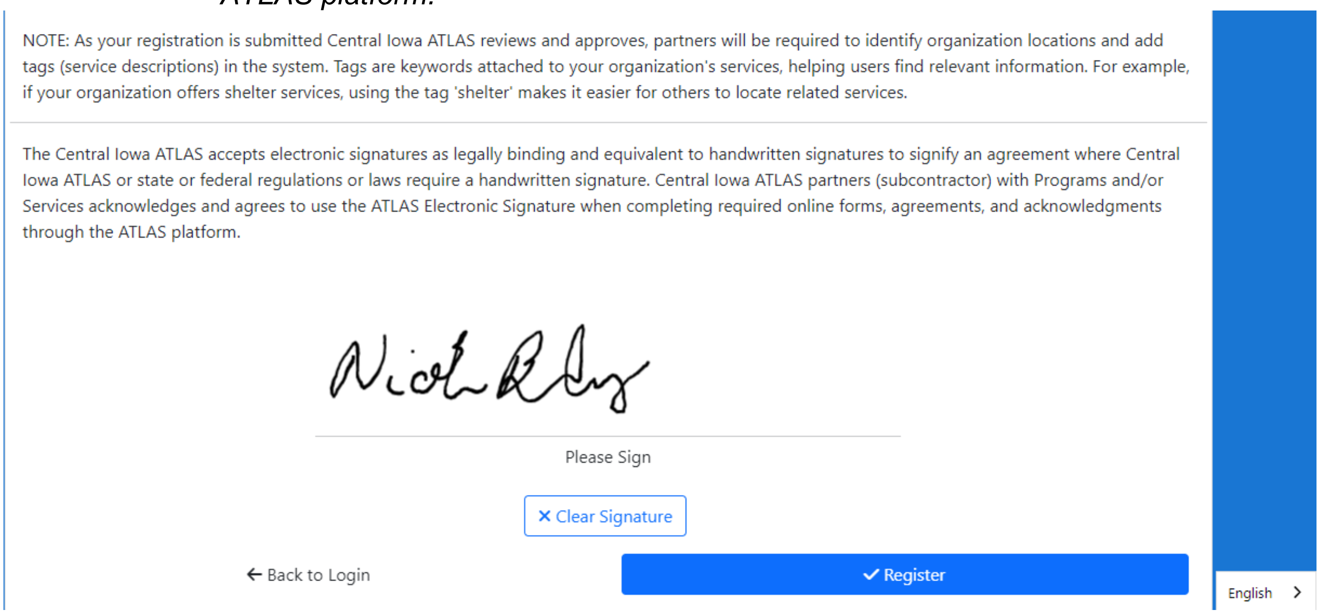
c. **Partner Organization Overview:** defined as entering a brief, however detailed, overview of their organization and services that are provided.
d. **Partner Organization Logo:** the logo that is uploaded must be in jpeg format and will appear throughout various areas of the portal, such as the partner database to the organizations partner profile page.
e. **Partner Mission Statement:** defined as entering the organization mission statement.
f. **Population Served:** defined as entering a brief, but detailed description of the specific populations the organization serves.
g. **Referral Requirements:** defined as a brief, but detailed description of any eligibility requirements that must be met by customers to be serviced by the organization.
h. **Office Hours:** defined as entering the organizations open office hours.
i. **Website Address:** defined as the organization's website. If your organizations website has https:// within the web address, please remove prior to entering the web address into the field as https:// is prepopulated.
j. **Partner Point of Contact First Name:** defined as the first name of the Partner Admin user.
k. **Partner Point of Contact Last Name:** defined as the last name of the Partner Admin user.
l. **Partner Point of Contact Job Title:** defined as the job title of the Partner Admin user.
m. **Partner Point of Contact Email:** defined as the email address of the Partner Admin user. This email address will receive the notification that their Partner account has been approved and made active.



n. **Partner Point of Contact Phone Number:** defined as the appropriate phone number the Partner Admin can be contacted at.
o. **Password:** defined as needing to meet the following requirements: a lowercase letter, a capital (uppercase) letter, a number, a special character, and be a minimum of 8 characters in length.
p. **Password Confirmation**: defined as user confirming password.

q. **E-Signature:** The Partner Admin user will review the following message outlined below and will either utilize a stylus or the computer mouse to apply their electronic signature.

"NOTE: As your registration is submitted...reviews and approves, partners will be required to identify organization locations and add tags (service descriptions) in the system. Tags are keywords attached to your organization's services, helping users find relevant information. For example, if your organization offers shelter services, using the tag 'shelter' makes it easier for others to locate related services."
"...accepted electronic signatures as legally binding and equivalent to handwritten signatures to signify an agreement where...or state or federal regulations or laws require a handwritten signature. ...partners (subcontractor) with Programs and/or Services acknowledges and agrees to use the ATLAS Electronic Signature when completing required online forms, agreements, and acknowledgments through the ATLAS platform."

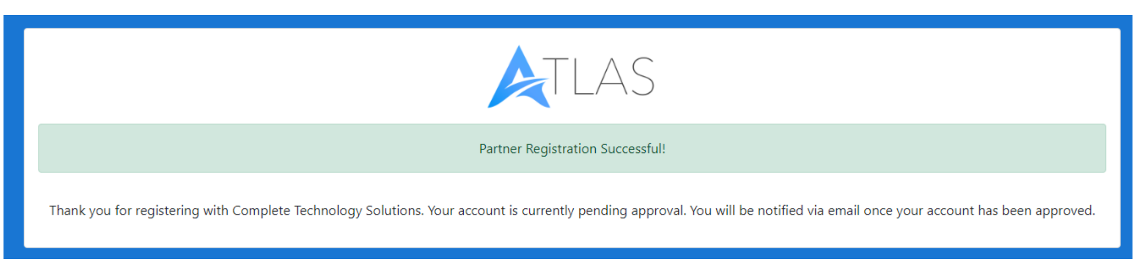


The figure above displays a sample view of a Partner Admin user applying their E-Signature to the Partner Registration form.

3. Once you enter all the fields and add your E-Signature, you will click the ***Register*** button to save the entered information and submit the completed Partner Registration form. The user will immediately be presented with the following message:

"Partner Registration Successful!
Thank you for registering with Complete Technology Solutions. Your account is currently pending approval. You will be notified via email once your account has been approved."

The email notification will be received from ATLAS.



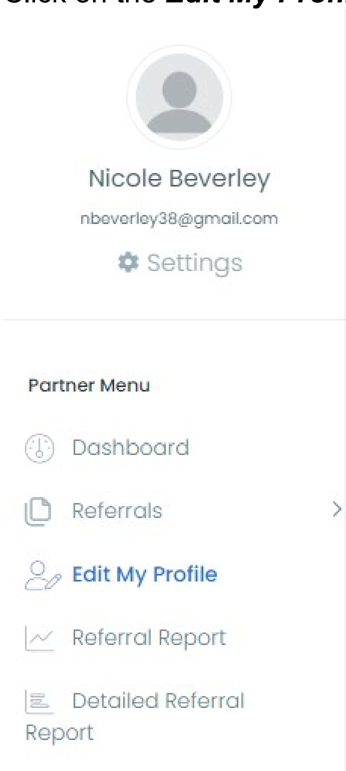
The figure above displays the message the Partner Admin user will receive once their completed Partner Registration form has successfully been submitted for review and approval from the Super Admin team.

The link below is a video that walks you through the steps of accessing the New Partner Registration form and the questions presented: [Video #1]

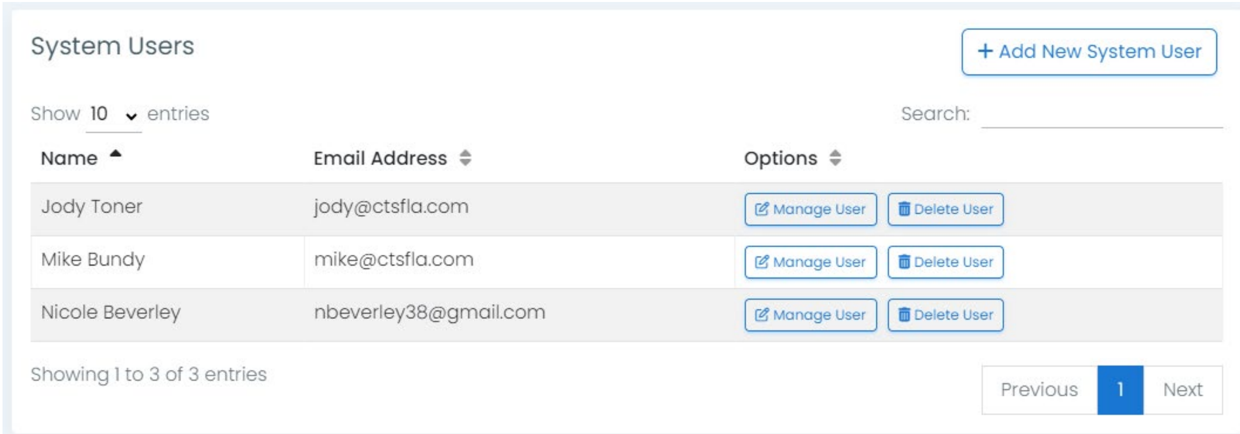
Note: A Super Admin does have the ability to create a partner account on the backend within the portal: [Video #1.1]

Partner Admin Option 2: If a user is needing a Partner Admin account, however the partner organization already has a partner account established within the portal, then the initial Partner Admin will need to complete the following steps to create the additional Partner Admin account:

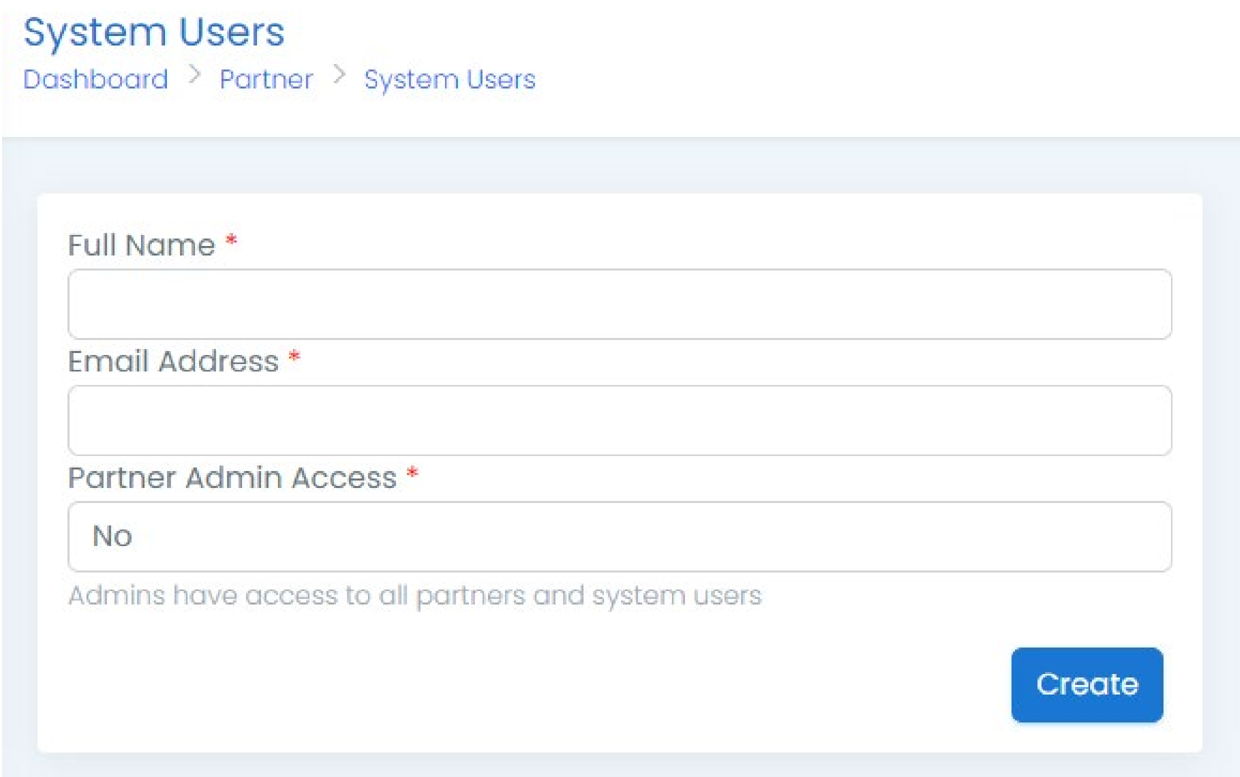
1. Go to the main login page of the portal and enter your login credentials.
2. Click on the ***Edit My Profile*** option from the Partner Menu.



3. Scroll down to the bottom of the page until you reach System Users and click ***Add New System User*** button.



4. Enter the following information:
    a. **Full Name:** defined as entering the full name (first and last) of the individual you are creating the account for.
    b. **Email Address**: defined as entering the email address that belongs to the account order mentioned in the above step.
    c. **Partner Admin Access**: defined as selecting from the dropdown menu **Yes**, so the individual will have the same access level as any other Partner Admin within the partner organization.
5. Click the ***Create*** button once you enter and select all the information. Refer to image below for reference to entry fields.



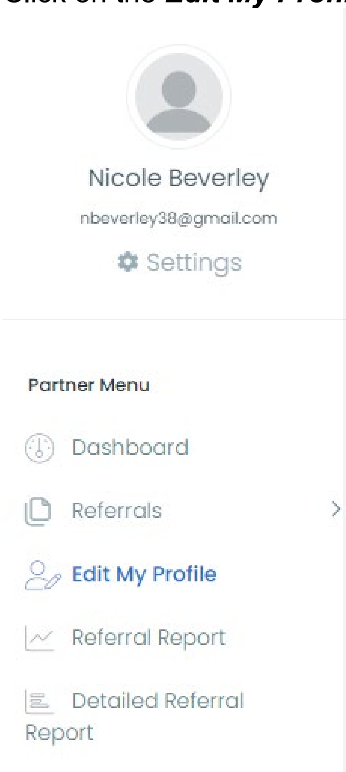
Once the account has been created, the new user will receive a email from ATLAS with the subject line: Reset Password Notification. The new user will need to complete this task to finalize their account creation and set up their password.

The link below is a video that walks you through the steps outlined above: [Video #2]

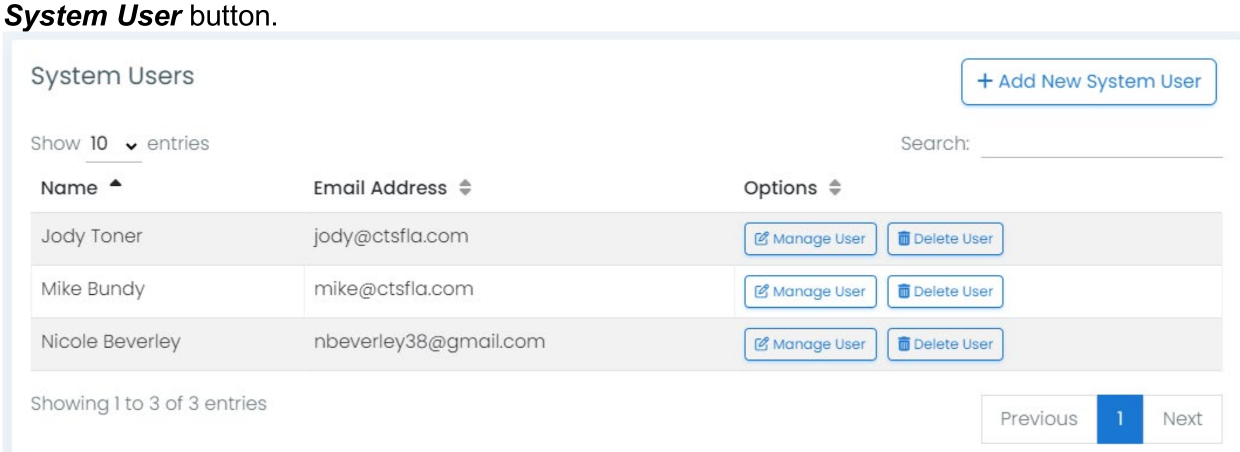
System User

If a **System User** does not have an account set up to access the COMMUNITY CONNEXTIONS Partner Portal, the user must reach out to their supervisor or known Partner Admin to have their account created.

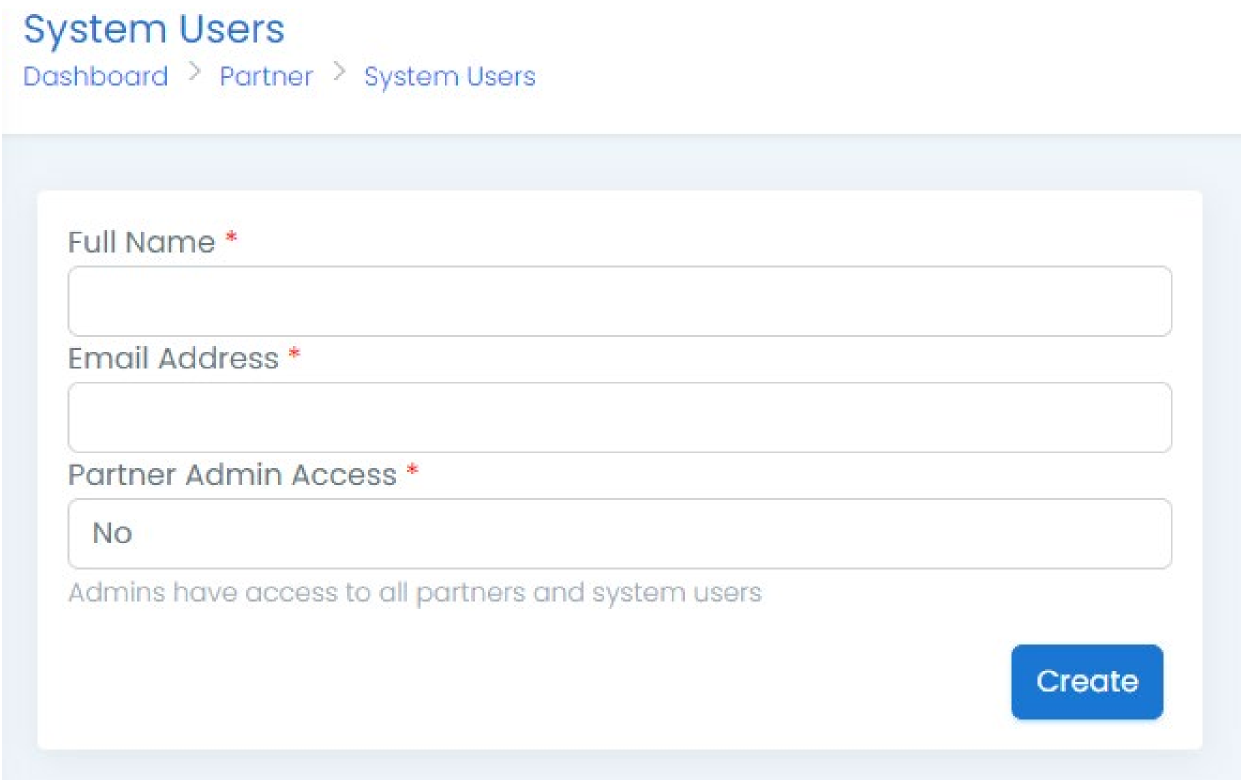
1. Go to the main login page of the portal and enter your login credentials.
2. Click on the ***Edit My Profile*** option from the Partner Menu.



3. Scroll down to the bottom of the page until you reach System Users and click ***Add New System User*** button.



4. Enter the following information:
    a. **Full Name:** defined as entering the full name (first and last) of the individual you are creating the account for.
    b. **Email Address**: defined as entering the email address that belongs to the account order mentioned in the above step.
    c. **Partner Admin Access**: defined as selecting from the dropdown menu **No**, so the individual will not have the same access level as any other Partner Admin within the partner organization.
5. Click the ***Create*** button once you have entered and selected all the information.



Once the account has been created, the new user will receive an email from ATLAS with the subject line: Reset Password Notification. The new user will need to complete this task to finalize their account creation and set up their password.

How to edit a System User:

1. The Partner Admin user will locate the ***System Users*** section under **Edit My Profile**, then click the **Edit** button associated with the appropriate System User that needs to be modified.
2. The user will edit the following fields:
    a. **Full Name:** defined as the first and last name of the System User.
    b. **Email Address:** defined as the email address of the System User being added.
    c. **Partner Admin Access**: defined as selecting from the dropdown menu **Yes** or **No**, so the individual will have the same access level as any other Partner Admin within the partner organization.
3. The user will click the ***Update*** button to save the modified System User to the partner account.

How to delete a System User:

1. The Partner Admin user will locate the ***System Users*** section under **Edit My Profile**, then click the ***Delete*** button associated with the appropriate System User that needs to be deleted.
2. A pop-up window will appear asking “Are you sure you want to remove the System User?” If yes, then click the ***Delete*** button.
3. Immediately, the deleted System User is removed from the partner account and will no longer have access to the porta.

2: Managing Pending Partners

When a Partner Registration is submitted through Option #1 as mentioned in the above section the registration is submitted and approved by a portal Super Admin. The user that submitted the partner registration will receive a notification notifying the user that their account has been created.

To approve the partner registration the Super Admin will follow the steps outlined below:

1. The Super Admin user will login into the portal and click on ***Partners*** option from the **Staff Menu** to expand the subcategories to select ***View Partners*** option.
2. Immediately the user will be redirected to the Partners section of the system.
3. The Super Admin user will select ***Pending*** from the **Select Statuses** dropdown menu, then click the ***Search*** button.
4. The page will immediately update and display only the partners that are in the Pending status.
5. The Super Admin user will click the ***Edit*** button of the appropriate partner organization to move forward with reviewing and changing its status within the system.
6. The Super Admin user must enter the information outlined below in the following fields to update the partners status:
    a. **Account Status:** The staff user will select either of the following from the dropdown menu.
        i. **Pending: all partner organizations will automatically be applied this status until any of the following three statuses are applied:**
            1. **Active:** if a partner is approved and has completed the partner agreement the staff user will select this status.
            2. **Disabled:** if a partner organization is not approved or needs to be removed from the system the staff user will select this status.
    b. **Accepting Referrals:** The Super Admin user will select either Yes or No from the dropdown menu.
        i. **Yes:** defined as the partner organization is willing and open to accepting and working referrals received through the portal.
        ii. **No:** defined as the partner organization is not willig to accept and work referrals received through the portal. The organization will still have a active partner profile page, however no user will be able to submit a referral to them through the portal.
7. Once the Super Admin user has entered and reviewed all the above fields the staff user will click the ***Update Partner*** button to save information.

The link below is a video that walks you through the steps outlined above: Video #3

Note: The system will prepopulate with information that was entered by the Partner Admin user at the time the Partner Registration was submitted.

3: Partners: Logging into Partner Portal

For all user types (Super Admin, Partner Admin users and System Users) to log into the portal is the same for each user will need to complete the following steps:

1. Access the portal through the project's unique URL web address using the users Internet Browser.
2. Enter users Username (the users email address) and Password, then click the ***Log In*** button.
3. Once the user has successfully logged into the COMMUNITY CONNEXTIONS Partner Portal the user will be greeted with the Dashboard.

The link below is a video that walks you through the steps outlined above: Video #4

4: Resetting Your Password

It is important to note that if a user already has an account created but cannot remember their login credentials, then the user must click the ***Forgot Your Password*** button to reset their login credentials.

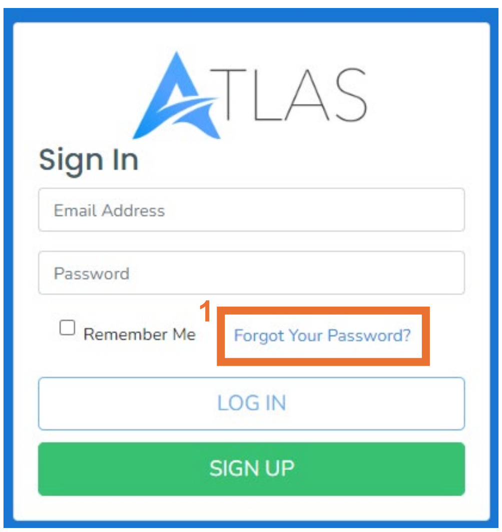


Figure above displays the COMMUNITY CONNEXTIONS Partner Portal Login Screen.

When a user is resetting their password the user will enter their email address, then click ***Send Password Reset Link***.

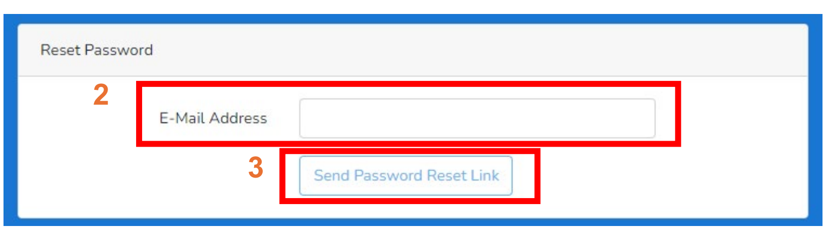


Figure above displays the Reset Password screen where the user will type in their email address and click the Send Password Reset Link button.

The user will receive a Password Reset Notification email within a few minutes. Once the email is received, they must click the ***Reset Password*** button to complete the process of creating a new password and resetting their password.

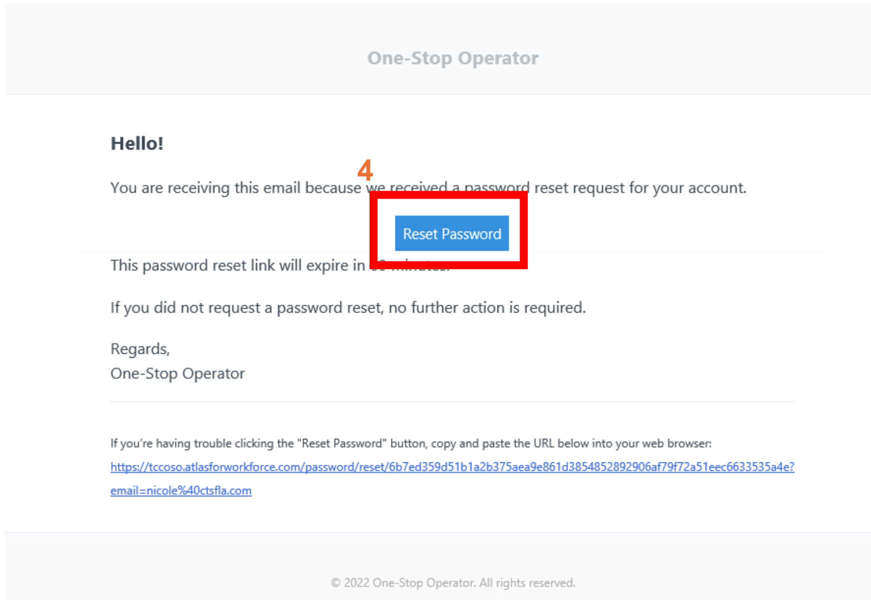


Figure above displays the password reset notification the user will receive via email.

5: Partners – Dashboard & View Partners

The Dashboard provides all users quick access to view a high-level, comprehensive overview of a partner agency and provides the user the ability to complete a referral within this viewing page to desired partner agency.

A Partner Admin and System User can access the Dashboard by selecting the ***Dashboard*** option from the Partner Menu.

For Super Admin users the equivalent of the Dashboard is referred to as ***View Partners***, which can be accessed through the Staff Menu and can be selected under the subcategories of the Partners option.

The Dashboard and View Partners houses the Partner Database that users can utilize to scroll and search for partner within the portal.

The user can select the appropriate partner profile to learn more information about the partner, including Application Information, Point of Contact, Locations, Intake forms, and how to refer a customer to their agency.

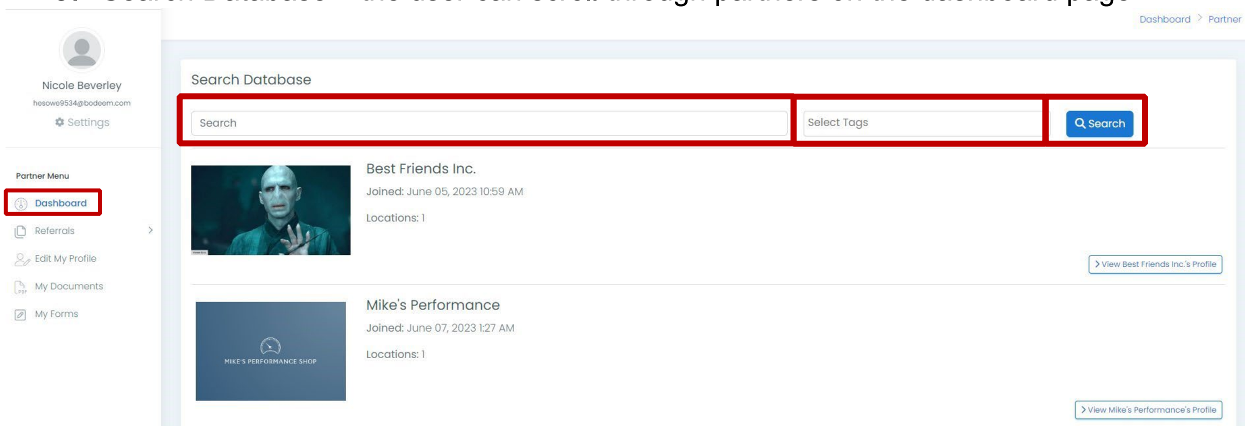
The link below will walk through the steps of accessing the Dashboard on the Partner Menu and selecting a partner organization: Video #5

The link below will walk you through the steps of accessing the View Partners on the Staff Menu and selecting a partner organization: Video #6

Dashboard

All users can search for a partner agency through multiple methods within the system from the Dashboard page:

1. **Search Bar** – this is an open text field where the user can enter the name of the partner organization that is needed, then click the ***Search*** button to populate the results.
2. **Tag** – this is a drop-down menu where the user can select the service type that is needed, then click the ***Search*** button to populate the results.
    a. Tags represent service types that partner agencies offer, such as Housing, Education and Training. Refer to section 15 for more information.
3. Search Database – the user can scroll through partners on the dashboard page.



The figure above displays a sample view of the Dashboard from the perspective of a Partner Admin user and System User.

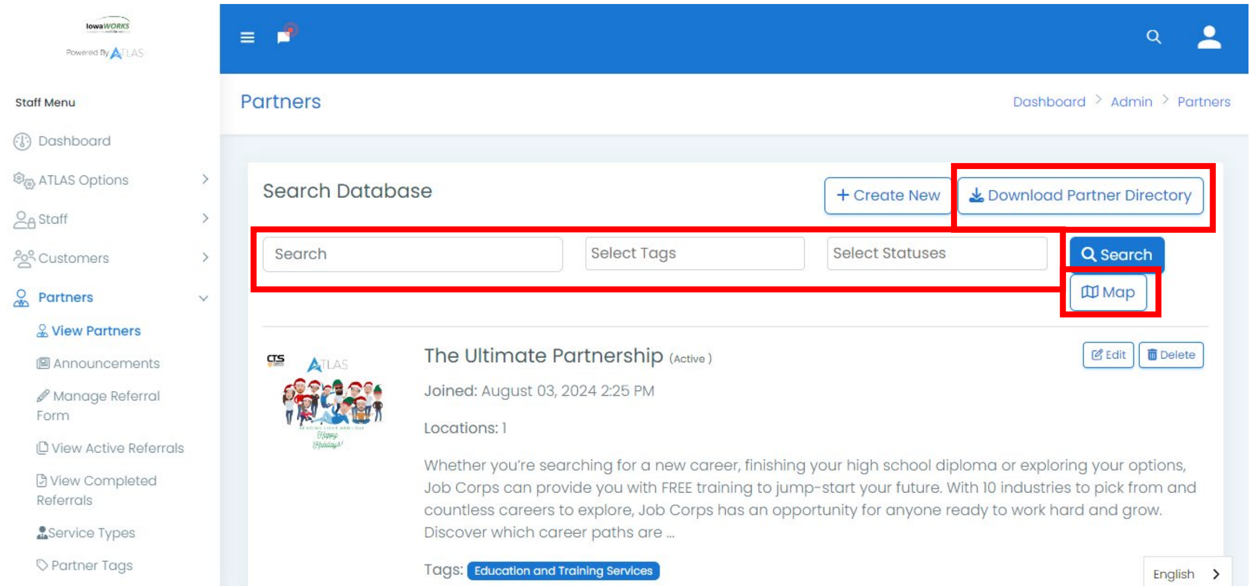
The link below walks you through the steps outlined above to search for a partner organization and view a partner profile page: [Video #7]

View Partners

Super Admin users can search for a partner agency through multiple methods within the system from the Dashboard page:

1. **Search Bar** – this is an open text field where the user can enter the name of the partner organization that is needed, then click the ***Search*** button to populate the results.
2. **Tag** – this is a drop-down menu where the user can select the service type that is needed, then click the ***Search*** button to populate the results.
    a. Tags represent service types that partner agencies offer, such as Housing, Education and Training. Refer to section 20 for more information.
3. Statuses – this is a drop-down menu where the staff user can select from ***Pending***, ***Active*** and ***Inactive***, then click the ***Search*** button to populate the results. These statuses directly reflect the status of a partner organization within the system.
4. **Map** – this displays an asset map of all partner organizations within the COMMUNITY CONNEXTIONS Partner Portal system.
5. **Download Partner Directory** – the user can download an excel spreadsheet all the partners within their portal that are registered and view all their profile information, such as contact information.

6. **Search Database** – the user can scroll through partners on the View Partners page.



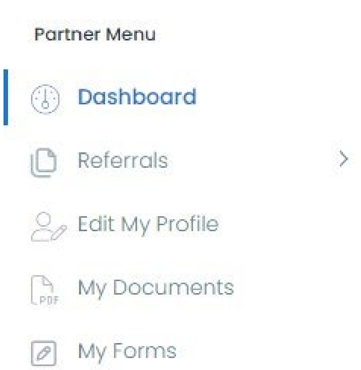
The figure above displays a sample view of the View Partners from the perspective of a staff user.

6: Partner Menu

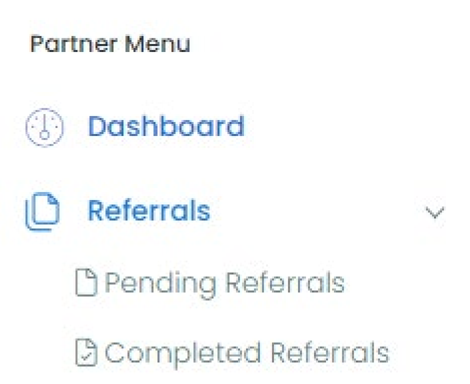
As part of the portal, the **Partner Menu** can be hidden or displayed. This can be done using an icon in the upper left of all screens, which is referred to as the Hamburger icon (═). The Hamburger icon functions as a toggle button displaying or hiding the navigation menu when it is clicked.

The COMMUNITY CONNEXTIONS Partner Portal includes a ***Partner Menu*** that lets the user swiftly access any available services without having to navigate through multiple screens. Using the Partner Menu, users can access all the services staff need within a click's reach.

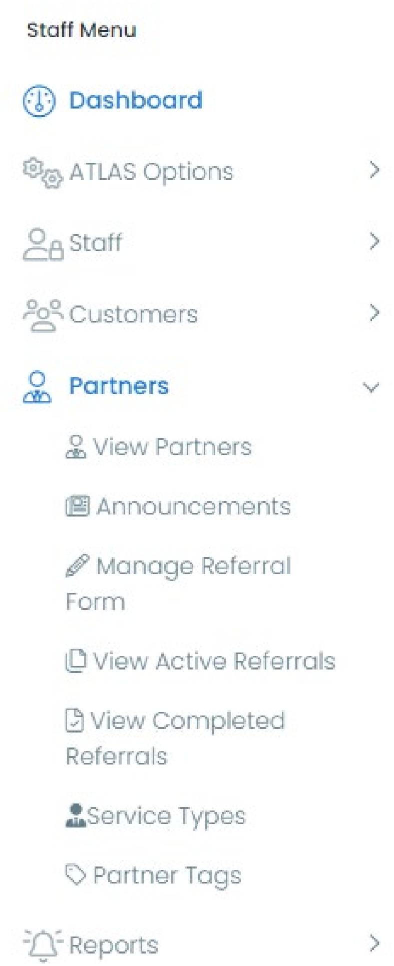
<u>Partner Menu: Partner Admin</u>



Partner Menu: System User



Staff Menu: Super Admin



7: Submitting a Referral

To submit a referral through the portal the user will need to follow the steps outlined below from a Partner Admin and System User perspective:

1. Access the ***Dashboard*** from the Partner Menu; the user will click the appropriate ***View XXX's (Insert Partners Name) Profile*** button, then select ***Submit a Referral*** button to access the referral form.
2. A pop-up window will appear asking the user to "*Please select a customer to refer*," which allows the user to search for the customer by entering 3 or more characters of the customer's name.
   - If the customer is registered within the system, then the customer will populate for the user to select, then click the ***Select Customer*** button to move on to step 3 of this process.
     - When a customer is selected, then the customer's information will prepopulate in certain fields within the Referral form.
   - If the customer is not registered with the system, then the customer will not populate for the user to select, however the option of Add New Customer will appear. In this circumstance the user will click the ***Add New Customer*** button. The following fields will populate for the user to enter the following information:
     - **Customer First Name**: defined as entering the first name of the customer.
     - **Customer Last Name:** defined as entering the last name of the customer.
     - **Customer Phone:** defined as entering the phone number of the customer that is the best option for the customer to be contacted at.
     - **Customer Email:** defined as entering the email address of the customer that is the best option for the customer to be contacted at.
3. Once the user has either selected or added the customer the user will select the service types from the main reasons the user is submitting the referral to the partner organization under the ***Please select service types*** field. This is a multi-select field, so the user can select more than one reason for why the referral is being submitted. NOTE: This information is considered reportable information as Super Admin and Partner Admin can extract this data element in reports.
4. The user will click the ***Select Customer*** button to submit the information above and proceed with accessing the referral.

NOTE: At the point of referral execution, the referral is a multi-way referral, and all notifications are sent out automatically by the system to the Super Admin(s), Partner Admin(s) of the receiving and referring partner organization, and the System User(s) of the receiving partner organization.

The link below is to a video outlining the steps of above of submitting a referral form through the portal: Video #8

8: Referrals

When a referral is submitted within the system it is tracked multiple ways that consist of a notification and copy of the referral being sent to Partner Admin and System User of the referring partner organization, all users of the receiving partner organization, and the Super Admin(s).

Referrals are managed through the Referrals option of the Partner Menu and the system sends the receiving partner organization and Super Admin a notification after 3 days of no activity on a newly received referral reminding the receiving partner organization to act and update the status of the referral. After 5 days of non-response and no action taken by the receiving partner organization, the referral returns to the partner organization that submitted the referral and the Super Admin is notified.

The system organizes referrals within the system within the following two methods for Partner Admin users and System Users, which are both accessible under the ***Referrals*** option within the **Partner Menu**:

- **Pending Referrals -** Stores all pending (active) Incoming and Outgoing Referrals that are associated with the partner organization that have not been closed out within the system.
- **Completed Referrals -** Stores all referrals associated with the partner agency that have been closed out within the system as either of the following statuses:
    - Received
    - In Review
    - Completed services provided
    - Denied

The link below is a video walking through the information outlined above: [Video #9]

For Super Admin users the system organizes referrals within the following two methods for, which are both accessible under the ***Partners*** option within the **Staff Menu**:

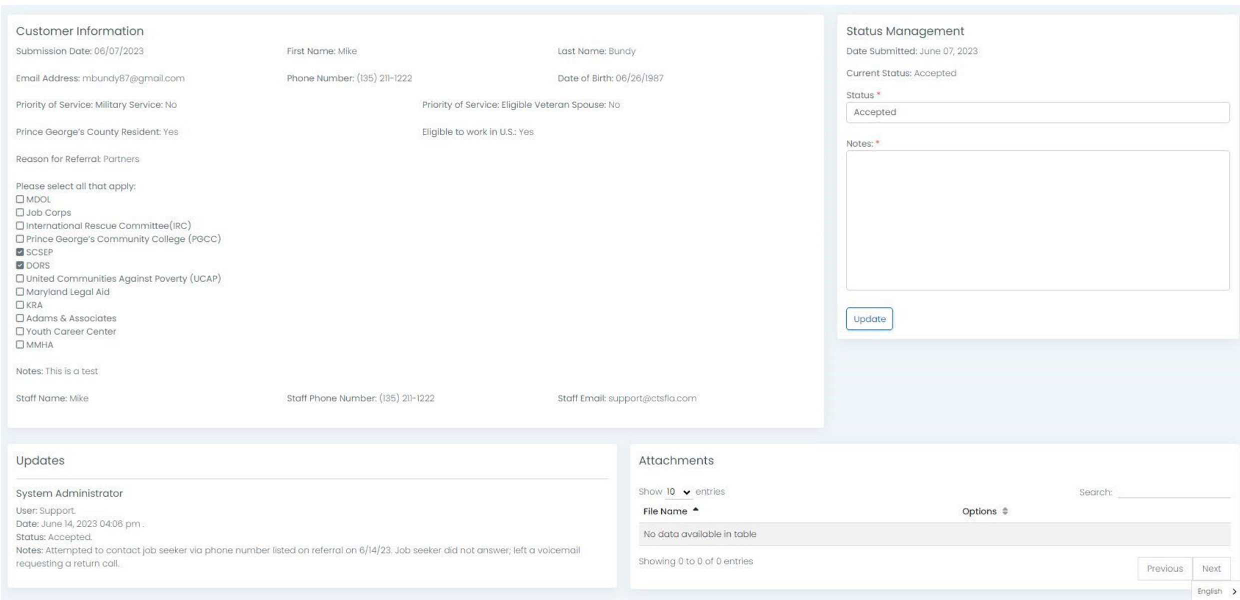
- **View Active Referrals -** Stores all pending (active) referrals that have been submitted throughout the system across all partner organizations that have not been closed out within the system.
- **View Completed Referrals -** Stores all referrals that have been submitted through the system across all partner organizations that have been closed out within the system as either of the following statuses:
    - Received
    - In Review
    - Completed services provided
    - Denied

All users can instantly view the following information from of the four methods listed above in a table format within the system:

- **Days Open:** defined as the number of days the referral has been open within the portal.
    - **NOTE: Upon the referral being received and has not been managed yet by another user the following business rules apply to the color of this field:**
        - **Green:** defined as up to third (3^{rd}) day.
        - **Orange:** defined as up to fifth (5^{th}) business day.
        - **Red:** defined as by the seventh (7^{th}) business day.
- **Customer Name**
- **Customer Phone Number**
- **Submitted By**: defined as the user that submitted the referral.
- **Submitted:** defined as the date and time stamp the referral was submitted.
- **Status:** defined as the current Referral Outcome of the referral.
- **Options:**
    - **Manage Referral:** the user can click this button to access the referral to update the status and add any notes.
    - **Export to PDF:** the user can click this button to open the pdf copy of the referral in a separate tab.

9: Manage Referral

Through the ***Manage Referral*** button all users can manage and update the outcome of Incoming Referrals and Outgoing Referrals that are associated with the partner organization. However, Super Admin can access Manage Referral for all referrals that have been submitted within the system across all partner organizations and perform the functions outlined within this section, while the view of Manage Referral is the same for all users. The functionality of Manage Referral provides a continuous flow of communication to update the appropriate partner organizations associated with the referral.

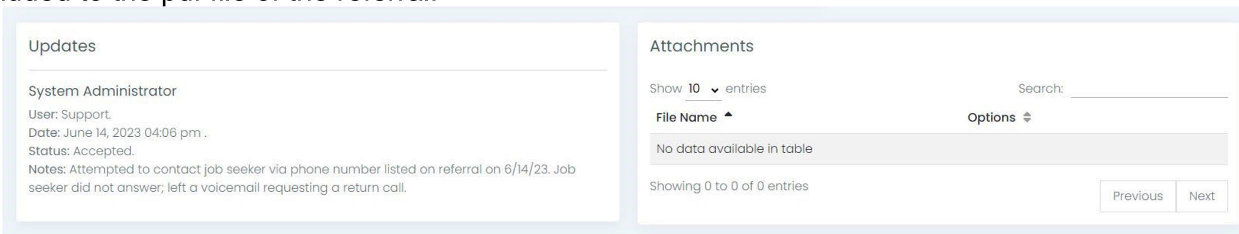


The figure above displays a sample view of the Manage Referral page from the Super Admin perspective, which is the same for Partner Admin users and System Users.

A referral's status can be updated using the following drop-down options under the **Status Management** section:

- **Received**
    - This status will automatically populate once a referral has been submitted.
- **In Review**
    - This status should be used when the receiving partner agency is reviewing the referral to determine if the partner organization can accept will need to deny the referral.
- **Completed services provided.**
    - This status should be used when the receiving partner organization is finished with servicing the job seeker and the referral is completed.
- **Denied**
    - This status should be used when the receiving partner organization is unable to accept the referral upon receiving the referral. For example, the customer may have previously received services and there is a time limit associated with services.

Each user in the system under **Manage Referral** can provide additional information regarding the referral in the **Notes,** known as **Referral Notes,** area of **Status Management** section. Any notes added to a referral will save under the referral within **Manage Referral**. Referral Notes added will always be available to review under Manage Referral, even if referral has been marked any of the statuses selected. Referral Notes are only viewable by users of the system. The Referral Notes are not added to the pdf file of the referral.

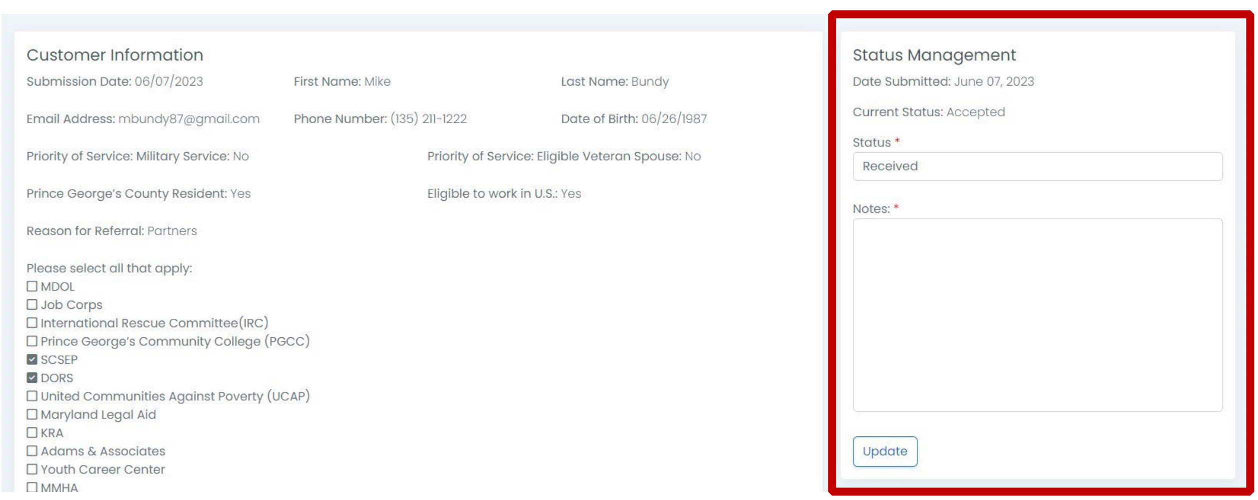


The figure above displays sample of Referral Notes and Attachments sections of the Manage Referral page of a referral.

The user must click the ***Update*** button to save the referral status and any notes added to the referral. As the referral status is updated under Manage Referral the status will update in real time under the status column within **Pending Referrals** for Partner Admin users and System Users, while for staff users the status column within **View active Referrals**. Also, it will be updated within **View Completed Referrals** for staff users if the referral has been closed.

The information data elements are displayed under the **Status Management** section:

- **Date Submitted:** this is the partner organization that submitted the referral.
- **Current Status:** this is the status of the referral that is currently set within the system.
- **Status**: this is a dropdown menu where the user can select the appropriate status of the referral.
- **Notes**: this is an open field text that the user can add any notes associated with the job seeker referral.



The figure above displays a sample of the Manage Referral page, Referral Management section and the Status Management section.

Referral Notifications:

The portal has built in notification rules surrounding referrals:

- Partner Admins are the only users that will receive a email notification from the portal upon receiving a new referral.
- The notifications are sent out on working business days.
- Notifications will only be sent for referrals that are in the “Received” status in the portal.
- A nudge reminder email notification is sent after three (3) business says to the Partner Admin of the receiving organization. The same email notification is sent after five (5) business days to both the Partner Admin. The Super Admin is copied on this email notification sent from the portal.

10: Partner Admins: Edit My Profile

Partner Admin users can update and manage the partner organizations partner profile through the Edit My Profile option on the Partner Menu, especially as funding availability changes, locations/point of contacts/ systems users are modified, or even the services the organization offers as services. It is recommended that Partners review this information monthly, to ensure up-to-date relevant information is always displayed.

To access a partner profile page to add and manage Locations, Point of Contacts, and System Users as a Partner Admin user:

1. The Partner Admin user will click on ***Edit My Profile*** option under the **Partner Menu**.
2. Immediately the user will be redirected to where the user can modify the following fields within their partner profile page:
    a. **Official Organization Name**
    b. **Accepting Referrals**
    c. **Organization Website**
        i. This website link will appear within the partners profile page that users can click on to access.
    d. **Partner Mission Statement**
    e. **Referral Requirements**
    f. **Population Served**
    g. **Office Hours**
    h. **Paragraph summary on programs and services your organization provides, include any eligibility criteria.**
    i. **Initial Application or Basic Eligibility Criteria or instructions**
    j. **Any additional forms, processes and/or performance tracking information you would like to share with the other partners.**
    i. **Newsletter URL**
        i. The Partner Admin user can add the partner organizations external newsletter by adding the newsletter URL within this field for other users to access.
    n. **Organization Logo**
        i. This logo must be in jpeg format and will appear in the Dashboard and the partner’s profile page.

Once all appropriate fields are updated the user will click ***Update Partner*** button to save the modifications. Immediately the updated information will be visible throughout the entire system for all users to view.

NOTE: All fields with a red * indicate it is a mandatory field.

The link below is a video outlining the steps above: [Video #10]

11: Partner Admins: Adding & Managing Locations

Within Edit My Profile, Partner Admin users add new, edit, and delete locations within the Locations section of Edit My Profile.

How to create and add a location to a partner profile page:

1. The Partner Admin user will locate the ***Locations*** section under **Edit My Profile**, then click the ***Add New Location*** button.
2. The user will enter the following fields:
    a. **Name:** this is defined as the name of the partner organization's location.
    b. **Address:** this is defined as the physical (brick & mortar) street address of the partner organization's location.
    c. **Phone Number:** this is defined as the appropriate phone number of the partner organization's location.
    d. **Please select location tags:** this is a multi-select dropdown field that the user can select the appropriate Partner Tags that are represented at this partner organization's location.
        i Partner Tags within the system represent the specific services that this partner organization provides. There is no limit on the number of Tags that can be associated with a partner agency.
3. The user will click the ***Create*** button to save the location to the partner profile page.

How to edit a location:

1. The Partner Admin user will locate the ***Locations*** section under **Edit My Profile**, then click the ***Edit*** button associated with the appropriate Location that needs to be modified.
2. The user can modify the following fields:
    a. **Name:** this is defined as the name of the partner organization's location.
    b. **Address:** this is defined as the physical (brick & mortar) street address of the partner organization's location.
    c. **Phone Number:** this is defined as the appropriate phone number of the partner organization's location.
    d. **Please select location tags:** this is multi-select dropdown field that the user can select the appropriate tags that are represented at this partner organization's location.
3. The user will click the ***Update*** button to save the modification to the location.

12: Partner Admins: Adding & Managing Point of Contacts

Partner Admin users can add and manage their point of contact(s) (POC) through the **Point of Contacts** section within **Edit My Profile**. The point of contacts will appear on the partner profile page for other users to view.

It is important to note that the Partner Admin user must create a location prior to being able to add a point of contact.

How to create and add a point of contact to a partner profile page:

1. The Partner Admin user will locate the ***Point of Contacts*** section under **Edit My Profile**, then click the ***Add New POC*** button.

2. The user will enter the following fields:
    a. **First Name:** defined as the POCs first name.
    b. **Last Name:** defined as the POCs last name.
    c. **Title:** defined as the POCs job title.
    d. **Email Address:** defined as the POCs email address.
    e. **Location:** the appropriate partner location will be selected from the dropdown menu that this POC should be connected to within the partner profile.
    f. **Phone Number:** defined as the best contact phone number for the POC if another user of the system wants to connect.
3. The user will click the ***Create*** button to save the POC to the partner profile.

How to edit a point of contact:

1. The Partner Admin user will locate the ***Point of Contacts*** section under **Edit My Profile**, then click the **Edit** button associated with the appropriate POC that needs to be modified.
2. The user will enter the following fields:
    a. **First Name:** defined as the POCs first name.
    b. **Last Name:** defined as the POCs last name.
    c. **Title:** defined as the POCs job title.
    d. **Email Address:** defined as the POCs email address.
    e. **Location:** the appropriate partner location will be selected from the dropdown menu that this POC should be connected to within the partner profile.
    f. **Phone Number:** defined as the best contact phone number for the POC if another user of the system wants to connect.
3. The user will click the ***Update*** button to save the modified POC to the partner profile.

How to delete a point of contact:

1. The Partner Admin user will locate the ***Point of Contacts*** section under **Edit My Profile**, then click the ***Delete*** button associated with the appropriate POC that needs to be deleted.
2. A pop-up window will appear asking “Are you sure you want to remove the point of contact?” If yes, then click the ***Delete*** button.
3. Immediately the deleted POC is removed from the partner profile page.

13: Partner Admins: Files

Partner Admin users can upload documents through the **Files** option within the **Edit My Profile**. The user will click the **Add New File** button and drop the files into the box within the page that need to be uploaded. Once the document is dropped in for upload the user will click the **Upload File** button to submit the documents.

The link below shows you how to add and delete a file to a profile page: Video #11

14: Partner Tags

Super Admin users are the only users that have access to create, edit, and delete Partner Tag options from selection within the portal. This section pertains to the management of tags within the portal and options presented to partner organizations to select from within the portal.

Partner Tags are defined within the system as representing the specific services that a partner organization provides. There is no limit on the number of Partner Tags that can be associated with a partner organization.

To access the **Partner Tags** a Super Admin user will select the ***Partners*** option from the **Staff Menu** to expand the subcategories and click the ***Partner Tags*** option. The user will immediately be redirected to the Partner Tags section of the system where the user can create, edit, and delete Partner Tags within the portal.

The link below shows you how to create, edit, and delete tag options from the portal: Video #12

Creation of Partner Tags

For a Super Admin user to add a new Partner Tag:

1. The staff user will navigate to the Partner Tags section of the system through the Staff Menu.
2. Once the user has accessed the Partner Tags section of the system, the user will click the ***Create New*** button.
3. The user will enter the following fields:
    a. **Name:** defined as the name of the Partner Tag that will display within the system that partners can select from when the Partner Admin is updating their partner profile under Edit my Profile.
    b. **Status:** the user will select ***Active*** from the dropdown menu.
4. Once the user has completed entering the above 2 fields the user will click the ***Create*** button to save the Partner Tag. Once this action is completed the new Partner Tag is available for all Partner Admin users to select.

Editing a Partner Tag

1. The staff user will navigate to the Partner Tags section of the system through the Staff Menu.
2. Once the user has accessed the Partner Tags section of the system, the user will click the ***Edit*** button associated with the appropriate Partner Tag that needs to be edited.
3. The user will enter the following fields:
    a. **Name:** defined as the name of the Partner Tag that will display within the system that partners can select from when the Partner Admin is updating their partner profile under Edit my Profile.
    b. **Status:** the user will select ***Active*** from the dropdown menu.
4. Once the user has completed the modifications click the ***Update*** button to save the modifications.

Deleting a Partner Tag

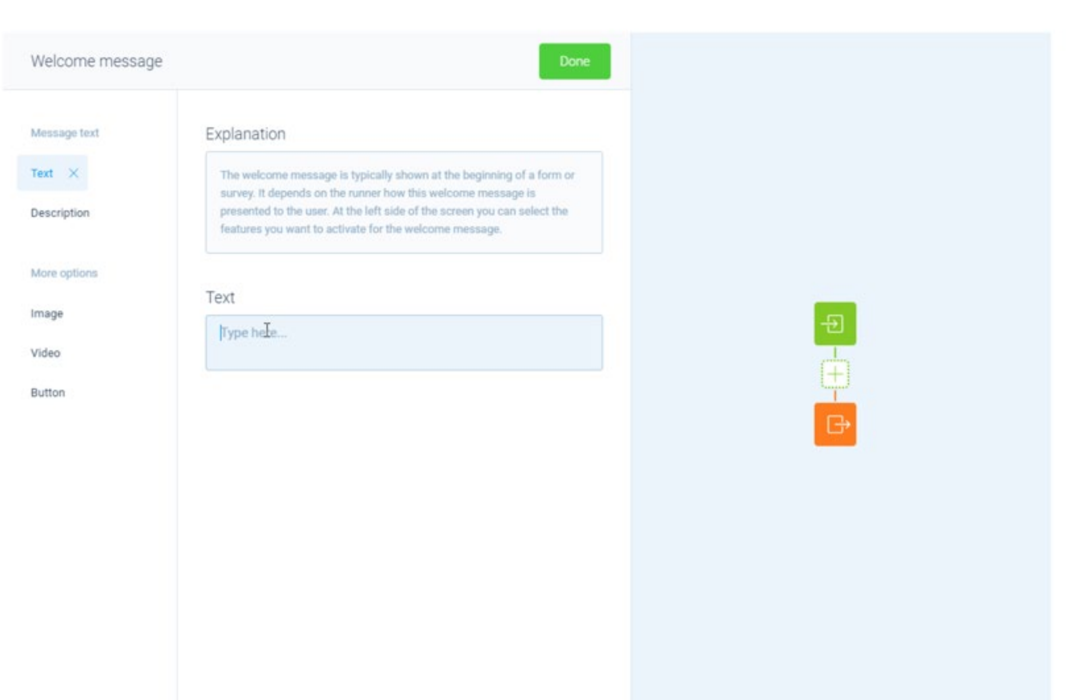
1. The staff user will navigate to the **Partner Tags** section of the system through the **Staff Menu**.
2. Once the user has accessed the Partner Tags section of the system, the user will click the ***Delete*** button associated with the appropriate Partner Tag that needs to be deleted.
3. A pop-up window will appear asking the user, ***Are you sure you want to remove***, which the user can click the ***Delete*** button to move forward with the removal of the tag or can click the ***Go Back*** button to return to the previous page.
4. Immediately the deleted Partner Tag is removed from the partner account and will no longer be accessible for partners under that section for selection.

15: Referral Form: Creation

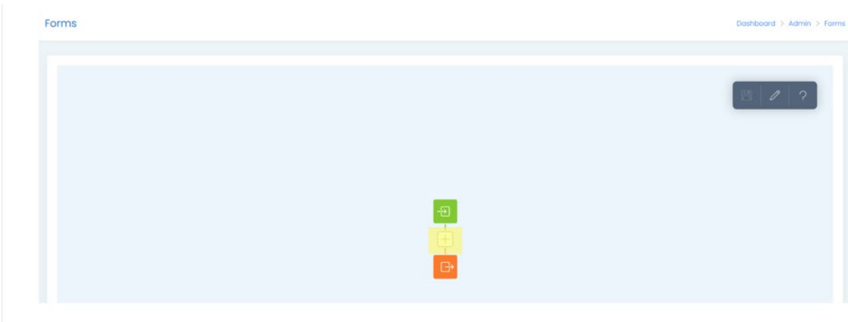
The Super Admin is the only user that has access to create and modify the COMMUNITY CONNEXTIONS Partner Portal Referral Form. The referral form that is created within the portal is used by all users when submitting a referral. It is highly encouraged and recommended that if modifications are needed to the referral form to reach out directly to ATLAS, especially if the Super Admin is not confident in their ability to modify the form.

To create a referral form within the system the Super Admin will need to follow the steps outlined below:

1. Click on the ***Referral Form*** option from under the Admin Menu.
2. Immediately the Super Admin user will be redirected to the form builder page where the Super Admin will click the ***Create New*** button to start the creation process. See figure below.
    a. **Naming the form:** To name your form you will click on the pencil icon on the upper right corner of the form builder window. The user will enter the name of the form in the Name field and click the green ***Done*** button.
    b. **Start and End Point of form:** To start building the content of the form the user will click on the green bubble, this is considered the starting point. The user can type in a welcome message or any instructions regarding the form in this section. This will appear at the start of the form when the end user opens on their end to fill out and submit. To provide an ending point to the form the user will click on the orange icon, within this the user can provide a closing message to the form or even multiple closing messages based on the respondent's answers.
    c. In between the green and orange icons is where the user builds out the form structure. To add a question, click the green plus symbol in the middle.
3. Once the user has built out the referral form the user must click the floppy disc icon to save the form creation.



The figure above displays the form builder page of the COMMUNITY CONNEXTIONS Partner Portal.



The figure above displays the location of the pencil and floppy disk icon within the form builder.

NOTE: It is important to click the floppy disc icon located in the upper right corner of the form builder window to save any elements built out within the form. If the user leaves the form builder window open and ATLAS times out the form will not automatically save, and any progress not saved will be lost.

16: Super Admins: Setting a Partner Account Status

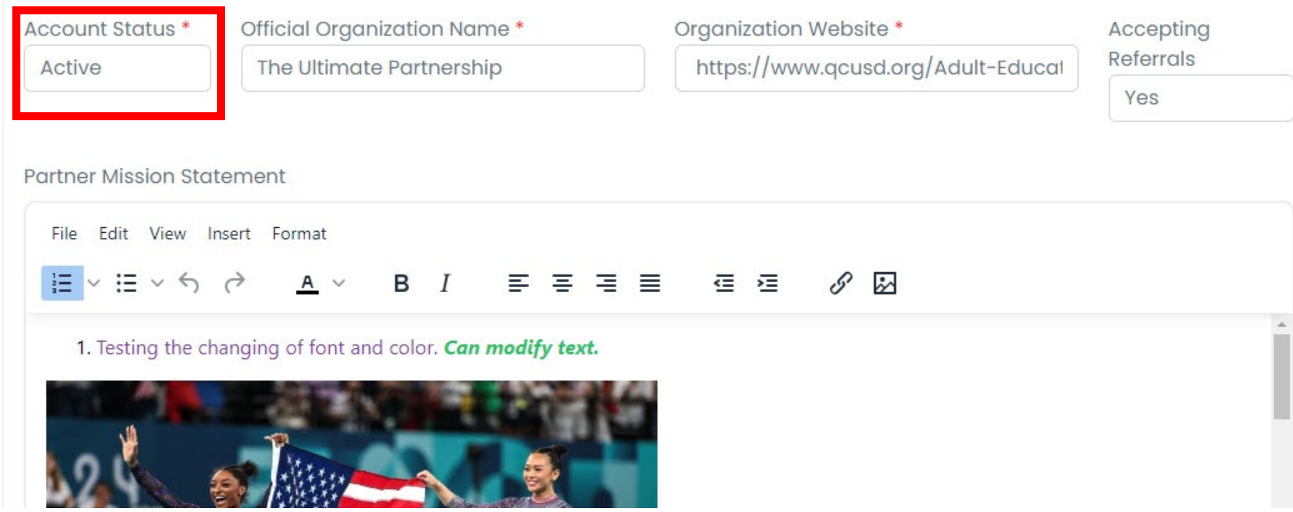
Super Admins can modify the status of a partner profile page from being either:

- **Pending**
  - This status is automatically applied to all newly created partner accounts.
- **Active**
  - This status indicates that partner profile page is visible to all users, users can send this partner agency referrals, and the Partner Admin for this agency can access their account to manage **My Referrals**, **My Locations**, **My Point of Contacts**, and **My Profile**, etc.
- **Inactive**
  - This status indicates the partner profile page is not visible to all users and users can not send this partner agency referrals.

The link below walks you through the management of partners Account Statuses: Video #13

To update a partner's status:

1. Click the ***Users*** section of the Admin Menu.
2. Click the ***Edit*** button for the appropriate partner, which the button is located under Options.
3. Under the **Update User Status** utilized the dropdown menu to select the appropriate status.
4. Click the ***Update Status*** button to save the User status. See figure below.



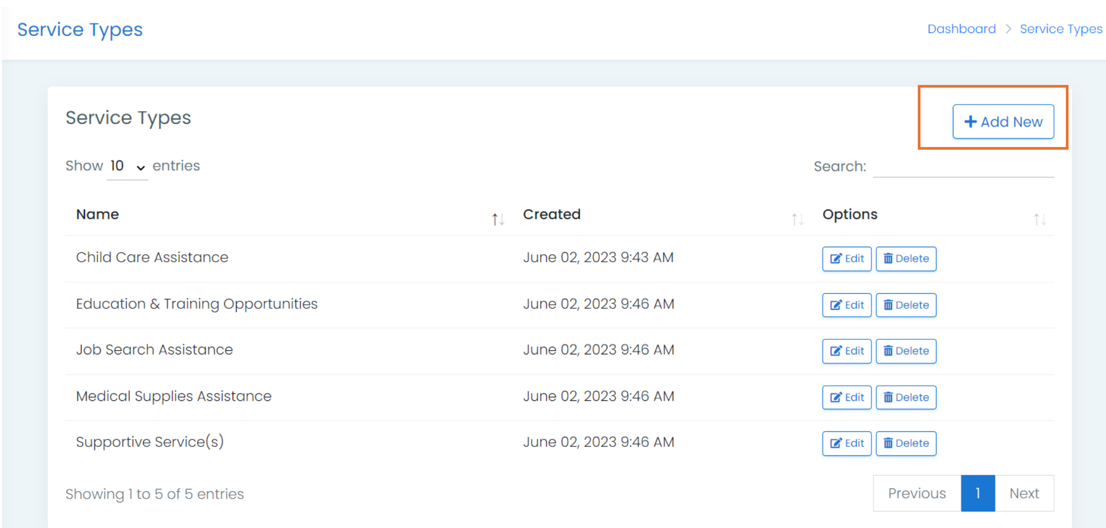
17: Super Admins: Service Types - Creation & Edit

The Super Admin is the only user that has access to **Service Types** under the Admin Menu. Also, this user has the only level of access to create **Service Types** that users will select from when submitting a referral.

The link below walks through the management of Service Types: Video #14

To add a new service type:

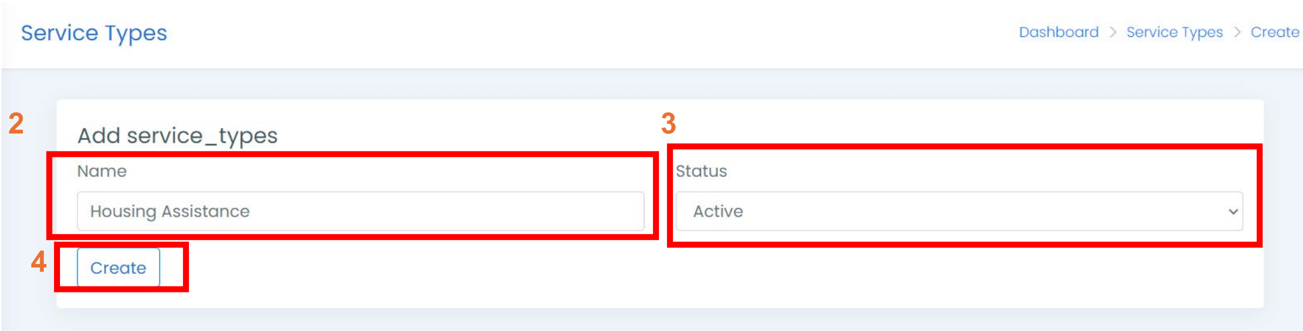
1. Click on the ***Service Types*** option from the Admin Menu.
2. Click on the ***Add New*** button from the Service Types page.



3. Type in the name of the Service Type and select the Status of ***Active*** or ***Disabled***. If you select the status of Active, then the Service Type will be available for users to select from when submitting a referral through the portal.

4. Click the ***Create*** button to save the Service Type, see image below. Once this action is

completed the new Service Type is available for all Partner Admins to select from when submitting a referral if the status was made to Active.



To edit a service type:

1. Click on the ***Service Types*** option from the Admin Menu.
2. Click on the ***Edit*** button located under Options for the appropriate service type the user needs to modify.
3. From here the user can modify the name and the status of the service type to either ***Active*** or ***Disabled*** within the portal.
4. To save the modifications made to the service type click the ***Update*** button.

18: Reports

The Super Admin user can pull several types of reports from the system, which are all able to be accessed under the ***Reports*** option on the Staff Menu. Outlined below are the reports available within the system:

- **Partner Activity:** This report will outline the activity of the partner organizations that have occurred throughout the system. The staff user can select the appropriate date range and the appropriate partner organization from the drop menu, then click the *Search* button to populate the results.
- **Partner Growth:** This report will outline the new partner organizations that have joined the system. The staff user can select the appropriate date range and the appropriate partner organization from the drop menu, then click the *Search* button to populate the results.
- **Referral Report:** This report will outline all the referrals and service types that have been submitted through the system since the launch of the portal usage. The staff user can select the appropriate date range and the appropriate partner organization from the drop menu, then click the *Search* button to populate the results. Also, the staff user can select the *Export* button to download the report out of the system.
- **Detailed Referral Report:** This report similar information as the Referral Report, however the user is able to narrow down the report data even further, such as by customer(s).

Both the Referral Report and Detailed Referral Report are available to Partner Admins to access as well.

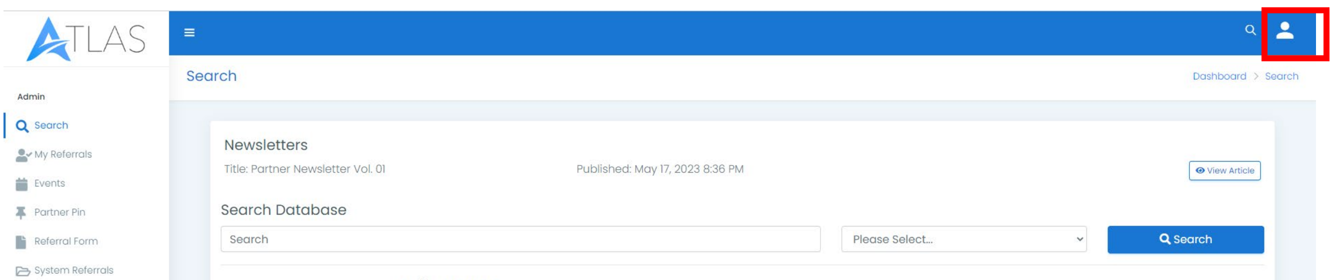
19: Report an ATLAS Software Issue

CTS ATLAS is all about streamlining and automating the user’s workflow process, and this includes when the user needs to report an issue or has a question regarding the functionality of the ATLAS system.

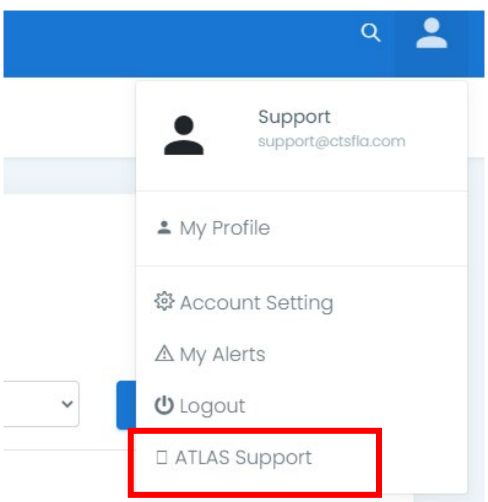
NOTE: SUPER ADMINS ARE THE ONLY USER TYPE WITH THE ABILITY TO REPORT AN ISSUE/ SUBMIT A SUPPORT TICKET.

Outlined below are the steps to successfully report a software issue or submit a question you may have about the ATLAS software system and its functionality.

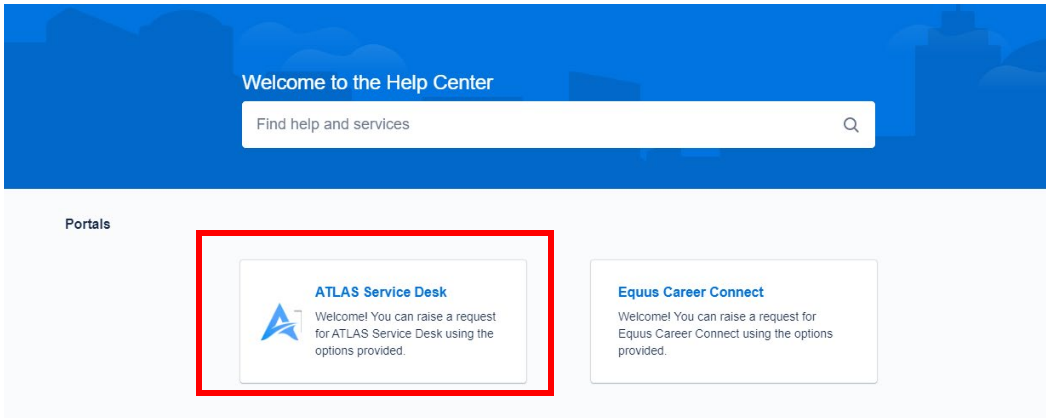
1. You will need to be logged into your COMMUNITY CONNEXTIONS Partner Portal account and from there locate the ATLAS Man symbol in the top right hand corner or the platform. See image below of the location and image of the ATLAS Man.



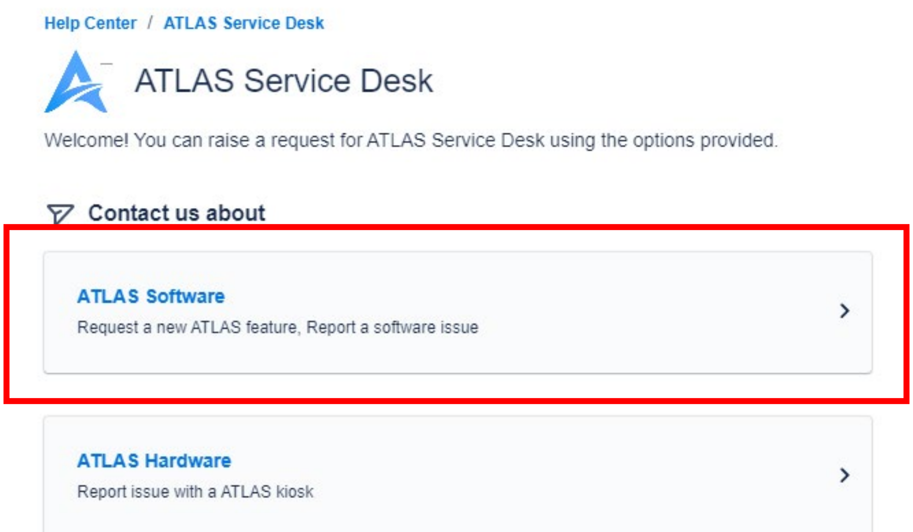
2. The user will select ***ATLAS Support*** option, see image below.



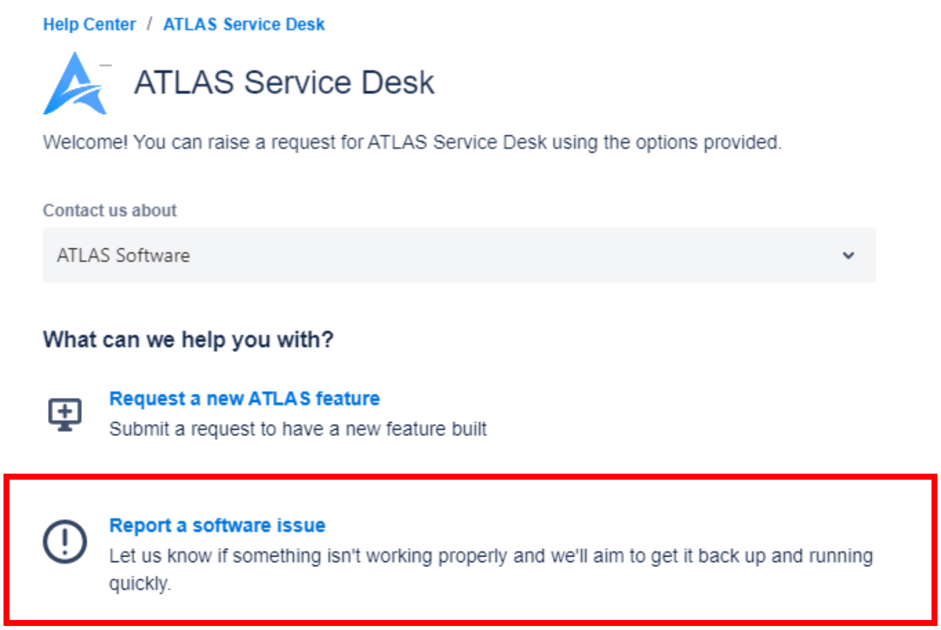
3. The user will be presented with two options to select between depending on the request the user needs to make, which is ***ATLAS Service Desk***.



4. The user will be presented again with two options to select between depending on the request the user needs to make, which is ***ATLAS Software***.



5. The user will be presented again with two options to select between depending on the request the user needs to make, which is ***Report a software issue***.



6. After selecting ***Report a software issue*** the user will be able to enter the following fields. It is important to provide as much detail as possible when reporting.
    a. **Attachment:** The user can add any screenshots that may be helpful in explaining the issue and expedite the resolution.
    b. **Project/ Region:** The user will select from the dropdown menu the project the issue is associated with.
    c. **Name:** The user will provide their first and last name.
    d. **URL of the page that you are having an issue with:** The user will copy and paste the URL from the search bar of where the issue/question occurred. This will assist the ATLAS team in resolving the issue and/or answering the question.
    e. **Description:** A one line description that accurately describes the issue/question the user is experiencing.
    f. **Describe in more detail:** The user can describe the question and/or issue experienced in more detail and what steps were taken that created/resulted in the issue occurring.
    g. **Priority:** The user will select from the list of options the level of urgency which the issue needs to be resolved or a question to be answered.
    h. **Browser:** The user will select from the options the browser the user was utilizing when the user experienced the issue.
    i. **Product:** The user will select from the options which ATLAS product the issue was experienced within. For example, the user would select ***ATLAS One-Stop Operator Portal***.
7. Once all the fields are completed the user will click the ***Send*** button to successfully submit the service ticket to the ATLAS team. Within seconds the user will receive an email confirming that the CTS ATLAS team has received their request and will continue to receive ongoing updates regarding the issue via email. It is important to note that users may need to respond to these emails as ATLAS's service techs may have additional questions for the user as they work through to answer the user's question and/or resolving the issue experienced.