GETTING INTO THE BTOTS TRAINING WEBSITE

1. Go to http://btots.mdsc.com/
2. Select Data Entry User or Program Administrator
3. Enter the Login Password (TrainMmmYY)
ENHANCED WEB CONTROLS

○ Quick Find Child
  - Alt + F shortcut
  - Search Options
    - John Doe (first name last name)
    - Doe, John (last name, first name)
    - J Doe (partial name)
    - 1/1/2010 (birthdate)
    - KK130121 (child ID)

○ Cancel dialog
  → Esc Key
BTOTS DASHBOARD
(1ST PAGE TO COME UP AFTER LOGGING IN)

• Messages
• Child alerts
• My non-parent/guardian referrals
• Pending transfers/referrals (This will only be used by office staff)
• My active children
• My tracking children (We are no longer tracking children through BTOTS)
• My unfinished wizards
MY ACCOUNT

- Account Information
  - Change email / password
  - Login history

- Contact Information
  - Name
  - Mailing address
  - Primary phone
  - Secondary phone

- Security Information
  - Forgot My Password
  - Access issues?
UPDATING PARENT EMAIL

To update parent/caregiver contact information simply select the contact tab under the child’s name.

Then select “edit contact info” and scroll down to “edit email address”
BTOTS FORM GOALS

1. Point of Care Data Entry (Data Entry In the Field)
   System will support entry at the time the service was provided.

2. Partial Data Entry
   The system will avoid all-or-nothing data entry.

3. Common Activity Flow (Wizard and Activity Forms)
   The system will provide data entry flow for common activities.

4. Support for Signature / Mailer Forms
   Signature and mailer forms will available for printing.

5. Digitized Signatures
   Provide a way for parents to sign forms in their home.

6. Secure Electronic Delivery
   Ability to easily and securely deliver forms to parents in an electronically secure manner.
BTOTS PRINTED FORM TYPES

1. Blank Printed Form
   • A generic form that can be printed and taken into the fields

2. Blank Child-Specific Printed Form
   • Child-specific blank printed forms include information such as the child’s name and demographics entered previously.

3. Partially Completed Form
   • A form with some information already completed can be
   • printed now and completed later at an appointment.
   • Form is available for wizards with the "Finish Later" feature.

4. Completed Printed Form
   • A form that contains the completed information to be provided for a parent or the child’s paper records.
   • Can include a digitized signature if completed at point of care.
   • Sent to parents via the Parent Portal.
**BLANK CHILD-SPECIFIC PRINTED FORMS**

- Access forms on the Child Folder Summary tab.

- Child-specific versions
  - Child name and demographics included
  - Writing space provided
  - Can be printed and completed or mailed

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*Utah Baby Watch Early Intervention*

*DB: 7/8/2011*

*Initial IFSP: 2/16/2012*

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*EARLY INTERVENTION SERVICE VISIT*

Visit Date*: / /  

Time In: :  

Time Out: :  

(m-d-y)

(h:mm)

(h:mm)
PARTIALLY COMPLETED PRINTED FORMS

- Access forms on the Child Folder Summary tab or partially completed notice.

- Partially Completed versions
  - Child name and demographics included
  - Writing space provided (incomplete sections)
  - Can be printed and taken to home
COMPLETED PRINTED FORMS

- Access forms on the Child Folder Summary tab or appropriate sub-tab.

- Completed versions
  - Contents are collapsed (optimized for space)
  - Can be printed and/or signed
  - Sent to parents via Parent Portal

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**Kids Kare Early Intervention**
**Baby Watch**

DOB: 7/8/2011
Age: 21 months
Service Coordinator: Jerry Fingernag

Individualized Family Service Plan (IFSP)
Start Date: 02/16/2012
Proposed Annual Review: 02/16/2013
Primary Language: English
PRIOR NOTICES AND OTHER SIGNATURE / MAILER FORMS

- Access forms on the Child Folder Summary tab or appropriate sub-tab.

- Signature / Mailer Forms
  - Enter data for printing
  - Mailed or sent to parents via Parent Portal
SIGNING COMPLETED PRINTED FORMS (ALL SIGNATURES CAPTURED AT ONE TIME (DUE TO SECURITY REASONS).

- Sign a completed form using the Sign links.
- Signature Steps
  1. Sign employee signature (once only – stored on file).
  2. Enter account password (used to verify signature).
  3. Select parent and capture parent signatures.
  4. Update parent’s email address (optional).
VIEWING SIGNED PRINTED FORMS

- View a signed form using the Signed Forms menu.
- Signed Forms
  - Saved at point in time with signature (will not be updated as changes are made to the child record).
  - Must re-sign if you wish to get the changes made.
  - Encrypted and digitally signed in addition to the digitized signature.
**SIGNED FORMS SECURITY**

1. **Form is completed**
   Form is completed prior to signing.

2. **Digitized signatures are captured**
   Parents don’t need to remember a password.

3. **PDF is digitally signed**
   Ensures nonrepudiation, authentication, and file integrity.

4. **PDF is encrypted and stored securely**
PARENT PORTAL GOALS

1. Ensure secure transfer of child information to parents.
2. Provide a simple process for parents to view child printed forms.
3. Reduce the effort for EI and PIP providers to ensure secure delivery of child forms.
Access to child forms in the Parent Portal requires two steps:

1. A valid PDF Code must be used (this code is sent via email to the parent).
2. Access must come from an authorized device (device authorization is completed by the parent answering 3 challenge questions about the child).
PARENT PORTAL OVERVIEW (INITIAL ACCESS)

1. Form is completed or signed.
2. Document is stored and PDF Code is created.
3. PDF Code sent to primary contacts.
4. Parent clicks the view form link.
5. Parent answers the 3 challenge questions correctly.
6. Parent device is registered with BTOTS server and form is displayed.
2. PDF Code sent to primary contacts.
3. Parent clicks on the form link and is able to view the form.

Note: A single challenge question must be answered if the parent wants to view all the forms.
Document code is sent to each Primary Family Contact with an email address listed.

Employees can view the list of documents available to the parents under the “Portal” tab in the child folder.

Employees can tell if parents have viewed the documents.

Emails come from do-not-reply-parent-portal@utah.gov.
A new email will be sent as soon as the document is completed OR if the document is changed after the parent views the document.

• Example A: The parent receives an email with a link, but doesn’t view the document right away. The provider adds additional notes to the visit after returning to the office. A new email is not sent to the parent for the change.

• Example B: The parent receives an email with a link and immediately opens the visit notes. Later, the provider adds additional notes to the visit after returning to the office. A new email will be sent notifying the parent that updates have been made to the visit notes.
PARENT PORTAL - PARENT PERSPECTIVE

Email is sent to the parent with links to the document via the parent portal and contains a special code.

Email Content:

Subject: Parent Portal link for Early Intervention Visit: OT - 9/6/2012 (updated)
From: do-not-reply-parent-portal@utah.gov
To: Debbie Digitalot

This email was generated automatically by your early intervention provider, BTOTS Helpline. Please do not reply to this address.

Dear Debbie Digitalot,

This link gives you access to your child's Visit: OT - 9/6/2012 (updated). To view this information click on the link below and your web browser will be launched automatically.

Visit: OT - 9/6/2012 (updated)

This link gives you access to all of your child's documents. To view this information click on the link below and your web browser will be launched automatically.

All Documents

You will not be able to reply to this email or email address. If you have questions or problems opening this link, you may contact BTOTS Helpline by phone at 801-266-3939.
PARENT PORTAL - PARENT PERSPECTIVE

-Initial use of Parent Portal will present the parent with an information screen.
PARENT PORTAL - PARENT PERSPECTIVE

For each new device or different browser used, the parent must correctly answer 3 of the challenge questions.

Subsequent views for known devices is streamlined.

- Single challenge question for view all child documents
- No further challenge question for single document view
PARENT PORTAL - SECURITY

Parents tab found under the Portal tab in the child’s folder.

Challenge Question Lockout

• After 3 failed attempts, the parent portal is locked for 15 minutes.

• After 6 total failed attempts, the parent portal is locked until reset.
PARENT PORTAL - SECURITY

Parent Access

• Parent access is removed 90 days after the child exits the program.
• Device registration expires after not using the parent portal for 90 days and parent has to re-answer challenge questions.

PDF Codes

PDF Codes are only sent to primary family contacts with an email address.
DATA ENTRY SHORTCUTS AND TIPS

- Change field focus → Tab (or shift tab)
  ![Legal First Name*](John)

- Radio buttons → Arrow keys
  ![Parent / Guardian](Other Referral Source)

- Checkboxes → Spacebar
  ![Premature Birth](Add Medical Diagnosis)

- Click selected button → Enter (or spacebar)
  ![Next](

- Click focused link → Enter key

Note: The enter key will cause the form to be submitted on many of the fields (e.g., text field, checkbox, etc.)
BTOTS SHORT CUT KEYS

- BTOTS shortcut keys are available for Firefox and Chrome
- Alt Shortcut Keys
- Child Wizards
  - Next / Back / Cancel

*Mac users:* Use Option key for Alt (include shift if not working)
BTOTS ENHANCED WEB CONTROLS

- **Autocomplete drop downs**
  - In-place text search
  - Arrow keys to change selection
  - Enter key (or tab) to select highlighted item

- **Date and Time Fields**
  - “T” – today’s date
  - “D” – default date
  - “L” – last date entered
  - ↑ / ↓ - increase or decrease date/time section
  - Use slash (“/”) or dash (“-”) to advance date section (e.g., “2” + “/” + “5” + “/” + “12” → “02/05/2012”)
ENHANCED WEB CONTROLS

- **Person / Organization Picker**
  - Search Options
    - John Doe (first name last name)
    - Doe, John (last name, first name)
    - J Doe (partial name)
    - Needs at least 3 characters
  - Person details by clicking on the selected person icon
  - New person wizard

```plaintext
austin bilbo
```

**New entry for "austin bilbo"**
Click here to enter this entry into BTOTS

Bilbo, Austin
Person; 7706 Hudson Oaks Dr, West Valley City; 123-555-3832
ENHANCED WEB CONTROLS

- **Non-sequential Wizards**
  - Allow you to skip around on the steps
  - Some steps have prerequisites
  - Save & Finish Later option

- **Child Quick Actions**
  - Access to child actions and forms without opening child folder