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About this manual

Welcome to the NY Connects Listing Maintenance User Manual. This document is intended to be a resource for you as you add and maintain listings in the NY Connects system.

The backbone of the NY Connects statewide database of listings is RTZ Associates’ GetCare system. This manual is designed to give you an introduction to this tool, as well as a reference for questions you may have as you work with GetCare. If you need additional help using the system, or have questions about policies related to system access or listing inclusion/exclusion criteria, you can contact NYSOFA at nyconnects@ofa.state.ny.us or (518) 474-6096.

Please note that the NY Connects system (and therefore this manual) is subject to alteration. Modifications/updates to the manual may result from changes in NYSOFA policies and procedures, GetCare system upgrades, or other factors.

The GetCare system was developed by and is the copyrighted property of RTZ Associates. The modules of GetCare specific to listing maintenance are leased by NYSOFA and made available to the NY Connects local programs. Use of GetCare and this manual is restricted to authorized end users of the NY Connects system. RTZ can be contacted at (510) 986-6700 or nyhelp@getcare.com.

Introduction to NY Connects and the GetCare system

The NY Connects website is intended to serve as a resource to consumers looking for long-term care support and services. Consumers will use the website to search for services by a number of criteria. The most common searches will use the type of service and the service area, but consumers also have the option of conducting advanced searches by target population, language spoken, types of payment accepted, etc. This manual explains how to enter and update listings within the GetCare system in a way that will allow consumers to easily find information in a usable format.

As you’ll see in this manual, GetCare organizes services in an agency/service listing relationship (sometimes referred to as “parent/child”). Each agency can have one or more related service listings, depending on how many services it offers. When consumers perform searches on the public website, the search results returned are for particular services, rather than agencies. Therefore, the service listing portion of the application is more detailed than the agency portion; the more information you fill out here, the more information consumers will be able to see about a service.

Since you will probably more often be updating information about specific services (rather than agencies), this manual will discuss the process of adding and editing services listings first, then the process of adding and updating agencies.
Logging in to the Listing Maintenance tool

At the training you attended, you received a URL to the login page. Once the NY Connects site is live, you will also be able to reach the login page from the home page.

Clicking on this link will take you to the login screen (shown below). Enter your user ID and password and click Log-in. If you have misplaced or need to change your password, contact the NYSOFA webmaster at nyconnects@ofa.state.ny.us.
After you log in, you will see the main menu. In order to see and edit your listings, click on the Listing Maintenance button.

The Listing Maintenance tool allows you to search for existing listings by a number of criteria and select listings to update.
Searching for Service Listings

The listing search tool allows you to find specific listings. You can use this page to search by:

- **Listing and Agency Names**: In these fields, you can specify a partial or full name. If you are not certain of the spelling of a name or how it appears (e.g., “Sample County Area Agency on Aging” may be listed as “Sample County AAA”), you should only enter as much of the name as you know, in order to avoid missing the listing you want to see.

- **Service Area**: Entering a value in this field will return listing results for providers that serve particular New York counties.

- **Program Type**: You can use this field to search listings via a drill-down method using the AIRS taxonomy. Highlight the program type that you want to use in your search and click the ADD=> button.

- **Status**: Whenever a new listing is added or an existing listing is updated, the new or revised listing must be approved before it can appear in consumer searches. This drop-down menu allows the user to sort listings by the various stages of approval:
  
  **Pending Update Approval**: Service listings that have been updated by providers or other personnel and are awaiting approval by the appropriate agency.

  **Active**: Service listings that are currently active and visible in searches on the consumer website.

  **Pending Initial Approval**: Service listings that have been newly added and must be reviewed by the appropriate agency before being made available in searches.
**Inactive**: Service listings that are no longer available to consumer searches. Listings may be marked inactive because the agency has closed, the agency no longer provides the service, the service listing is a duplicate of a listing already in the database, or for several other reasons.

- **Date Updated**: This refers to the date the listing was last updated. You do not need to fill out both dates in order to come up with a result.

  Entering a specific range of dates: (e.g., 1/1/2008 and 1/1/2009) will bring up listings updated between January 1, 2008 and January 1, 2009, inclusive.

  Entering a *start* date in the first set of fields (while leaving the second set of date fields blank) will bring up all listings updated on or after the date you specify.

  Entering an *end* date in the second set of fields (while leaving the first set of date fields blank) will bring up all listings updated through the date you specify. For example, to see all listings updated at least six months ago (if today is June 1, 2009), you would enter 6/1/2009 in the second set of date fields. This will bring up all listings updated on or before 6/1/2009.

You can enter information in multiple fields on this screen in order to narrow your search.

To search for listings in the NY Connects database that match the criteria you’ve entered, click the **Search** button.

To clear the information you’ve entered and start a new search, click the **Reset** button.
Listing Search Results Screen

After you enter your search criteria into the previous screen and click **Search**, you will see a screen that looks like this:

![Listing Search Results Screen](image)

Listings usually appear in alphabetical order by listing name. You can sort the results in ascending order in any of the first five columns by clicking on the column name. For example, if you want to sort by program type, you can click the **Program Type** column name, and the list will resort and display all listings alphabetically by program type.

**Editing Service Listings**

Each user of the NY Connects system will only be able to edit certain listings, based on her agency and the permissions she has (i.e., a user from NY Connects Program A and one from NY Connects Program B will see different listings in the Listing Maintenance search results).

In order to edit a listing, click on the underlined listing name in the left column. Doing so will bring you directly to that listing's information screen.

**Adding Service Listings**

Before you add a new service listing to an agency, check to see which listings already exist for that agency. On the Search Results screen, click on the **Agency Name**.
Click on the **Summary of Service Listings** tab on this page.

You will see a list of all the services associated with that agency.

On this page, you can edit any of the agency’s existing listings. If you want to add a completely new listing, click on the **Add New Service Listing** button.
The Service Listing Tab

When you go to add a new listing or edit an existing listing, you will be directed to the screen below. Here, you can add, edit and/or review the information associated with a listing.

GetCare breaks down each service listing into six main tabs, each of which allows you to enter different kinds of information about the listing. We will go through these tabs in the order in which they appear in the system.

Please note that NYSOFA has created a set of business rules to guide the development of the statewide database. These business rules include a list of required and recommended elements for each service listing. Listings that do not contain the required elements can still be entered into the system; however, they will not be approved for publication on the live site, and consumers will not be able to find those listings in searches.

You can download a copy of the business rules under the Help link in the logged-in portion of the website. We have also noted the recommended and required elements on each tab below as they appear.

Tab 1: Information

The first step in the process of updating a listing is the Information tab. This tab contains the basic information about the listing: name, alternate name or AKA, description of services, associated agency, business type, website, and administrative contacts.

Required elements: Name of Service, Description of Service
Recommended elements: Website
If you are also using GetCare’s I&R tool, you can use the Alert Description field to create alerts about listings for the I&R agent. Otherwise, you can ignore this field.

Click the **Save and Continue** button if you make any changes to the screen that you would like to keep.

Click the **Reviewed – No Changes** button if you simply reviewed the information for accuracy, but did not make any changes. You can also click this button if you made a mistake and want to restore the information on the screen to its original state.

At any point in the process, you can click the **View Revised Service Listing** or **View Current Service Listing** links at the bottom right to see how the information for this service will be displayed on the consumer website. The **View Revised Service Listing** link will display the listing with your changes; the **View Current Service Listing** link will display the listing as it currently appears on the website (if you are revising an already existing listing).
Tab 2: Location

After clicking **Save and Continue**, you will be directed to the next tab on the screen, the **Location** tab.

Required elements: Address, City, State, ZIP, Phone number, TTY/TDD (if applicable), Service area

Recommended elements: Fax

When new service listings are added to an agency record, the address and phone number from the agency tab will automatically appear in the address and phone number fields for each listing. In the event that the agency changes its contact information, the change will apply across all listings associated with that agency. If an agency has multiple sites and wishes to list the address and contact information of the site, you have the ability to edit the address information here (simply click the **Edit** link next to the Address label, as indicated above).

Once the address has been changed on a listing, the address in the listing will no longer be tied to that of the agency. If the agency updates its address, the changes will not be reflected on this specific listing.

If an agency has multiple locations where services are delivered, you don’t have to type in different address information for each new or updated service. On the upper right hand corner of this tab, you see a field labeled **Existing Service Delivery Site**. This drop-down menu contains a list of all the locations associated with an agency. If you select a location (in the example...
below, the user has selected the existing site with the name “Peach Tree”), the information for that location will automatically appear in the address fields.

You can add a new site to the list when you click on the **Edit** link in the Address field. Just enter the address and contact information, and name the new site in the **Service Delivery Site** field.

The **Service Area** field allows the user to indicate the New York counties where the service is provided, as distinguished from the physical address of the agency or agency site providing the service.

For example, if a home-delivered meals program is located in Albany County but also serves consumers in Rensselaer, both counties should be highlighted in the **Service Area** list. Because the service area is one of the criteria consumers use to search for services from the public website, entering accurate service area information is particularly important.

Click the **Save and Continue** button if you make any changes to the screen.

Click the **Reviewed – No Changes** button if you simply reviewed the information for accuracy but did not make any changes.
Tab 3: Target Population

The target population screen asks the provider to list all information pertaining to the population(s) for whom the service is intended.

Required elements: Target Group
Recommended elements: Language(s), Other Eligibility Criteria

Please note that you can make multiple selections in the fields on this screen by holding the Ctrl key (or the Cmd key, if you’re using a Mac) and clicking the appropriate values. If you have highlighted a value by mistake, you can unhighlight it by holding Ctrl and clicking again.

**TIP:** In GetCare, there is a subtle distinction to be made between a “Target Group” for a certain population and a population that a service is “Able to Accommodate.”

The “target group” field identifies specific groups of people that the program or service is intended to serve. For example, an employment program for older adults would want to highlight the value “older adults” in this field. Mostly, this field is used for those programs or services whose scope is somewhat narrower than “general public.” Target group is one of the values consumers can use to search from the public website. The target group values that appear on this tab are added at the discretion of NYSOFA to reflect the scope of **NY Connects**.

The “able to accommodate” field illustrates what kind of circumstances and situations the program or service *can* serve. For example, a rehab center that serves all adults, but that has training or experience in serving people with developmental disabilities could be said to be able to accommodate developmental disabilities, though that may not be their special focus.
Likewise, if a service site or program can accommodate wheelchairs, this is helpful for people to know, even though it may not be the focus of the program.

Click the **Save and Continue** button or the **Reviewed – No Changes** button, as appropriate.
Tab 4: Availability

The Availability Tab allows you to store information about hours of operation, capacity, current availability, and other information consumers may need to access the service.

Recommended elements: Hours of Operation, How to Access Services

Click the **Save and Continue** button if you make any changes to the screen.

Click the **Reviewed – No Changes** button if you simply reviewed the information for accuracy but did not make any changes.
Tab 5: Cost

This section contains information about the cost of the services an agency offers, as well as the funding sources accepted.

Recommended elements: Cost, Funding sources accepted

As you can see at the top of the screen, you can indicate here that no one will be denied services for inability to pay. You can also enter a range of costs, where appropriate.

Click the **Save and Continue** button if you make any changes to the screen.

Click the **Reviewed – No Changes** button if you simply reviewed the information for accuracy but did not make any changes.
Tab 6: Quality

On the Quality Tab, you can store information about the service’s licenses, certifications, and accreditations. You can also inform consumers about the procedure for reporting problems they encounter with the service.

![Quality Tab interface](image_url)
The Admin Tab

Required elements: Program Type (Taxonomy Code)

The Admin tab is designed for the purpose of finalizing each listing’s program type and target population classification. This tab also allows users to approve a listing and make it available on the live site.

**NOTE:** Not all users will have access to the Admin tab. If you do not see this tab when you view a listing, then your account does not have the permissions necessary to perform the functions on this tab. You can still edit and add listings; however, you cannot classify them or push them to live.

**Program Type**

Via a drill-down method, the Program Type menu is used to classify listings according to the AIRS/211 LA County Taxonomy of Human Services. You will notice as you move through the drill-down process that only a small subset of the Taxonomy has been activated by NYSOFA for the NY Connects project. The active taxonomy codes and their corresponding program types reflect the inclusion/exclusion criteria that set the parameters for NY Connects.

The first level of classification lists the most general categories in the AIRS taxonomy, which appear in a drop-down menu. These categories, derived from the categories currently attached to the NY Connects listings, are:

- **B – Basic Needs**
When you select a general AIRS category, another drop-down menu will appear, containing the sub-categories included within that AIRS category. This drill-down method continues for two more levels, allowing you to select the most specific and appropriate AIRS code for that service.

In order to assign the program type to a listing, click **ADD =>**.

**Hint:** In order to maximize the quality of service listing data, if a listing offers more than one type of service, you should code each service offered as a separate listing. **Even if listings have overlapping characteristics – shared contact information, phone number and hours of operation – code them as two separate listings, rather than combining the two services as one listing.** If, for example, Happy Days Senior Center offers both immunizations and congregate meals, you should enter two listings with different service types.

**Target Population**

The **Target Population** menu is used to further refine the classification of a listing. It is the final general category in the AIRS taxonomy. Unlike the other ten AIRS taxonomy general categories, this eleventh category (“Y-Codes”) covers populations, not services. It describes the specific group or groups of people whom a listing is focused on serving. Selection of **Target Population** is a required field by NYSOFA if and when it is applicable to the program. Users should select a value in this menu if the services provided by a listing are specifically intended for, or focused on, a particular population.

These categories are:
In order to allow users to arrive at the most appropriate level of detail regarding the population served by a listing, the **Target Population** menu also utilizes the drill-down method.

As before, click **Add =>** to assign a target population classification.

The lists of both program types and target populations have been defined by NYSOFA using inclusion/exclusion criteria developed specifically for the NY Connects program. If you have suggestions or requests for additions or changes to either the Program Types or Target Population lists, please contact NYSOFA at [nyconnects@ofa.state.ny.us](mailto:nyconnects@ofa.state.ny.us).

**Listing Number**
Each service listing receives a specific listing number that identifies the NY Connects program in which the agency is located and which has jurisdiction over reviewing and maintaining the listing. This number is produced automatically when the listing is created.

**Agency ID**
The **Agency ID** is an internal number assigned to each agency separately from its associated services.

**Completion Score**
Each service listing receives a **Completion Score**, which helps the user determine if there is sufficient information for a listing to be published. This calculation is based upon data components that are essential to the integrity of a service listing (e.g., whether the listing has an address, a phone number, a service description, etc.). For each service listing, the maximum score is 22. Calculation of the score is based upon the completeness of listing and agency data elements.
Date Created
The date when a listing is first created and entered into the NY Connects application is automatically recorded by the system in the Date Created field.

| Date Created: | December 11, 2009 |

Created By
The User ID of the individual who creates the service listing record is recorded in the Created By field.

| Created By: | New York Demo |

Most Recent Updates
The External Update By field captures the source of new information entered by service providers who, having access to only their listing in the system, log in to submit information. That date is recorded in the field labeled Last External Update.

The Formal Update By field captures the identity of the staff member who most recently formally updated a service listing. That date is recorded in the field labeled Last Formal Update. The sources of information for formal updates can be made by individuals with various levels of system authorization, but the changes remain pending until approved by an admin user.

The Approved By field refers to the user who makes the final determination that the information of a listing is complete and accurate. That date is recorded in the field labeled Last Approved.

<table>
<thead>
<tr>
<th>Last External Update Date:</th>
<th>Last Formal Update Date:</th>
<th>Last Approved:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Deleted Service Listings
If the service listing has been deleted, the individual associated with the deletion and the reason for deletion are recorded in the following fields:

<table>
<thead>
<tr>
<th>Deleted:</th>
<th>Deleted By:</th>
<th>Reason for Deletion:</th>
</tr>
</thead>
</table>

**Private/Public**
Each service listing can be designated as either **Public** or **Private**. If a service wishes to have its information in the database, but not appear in consumer searches, it can mark the information as **Private**. If your site is using the GetCare I&R tool, you will be able to view listings marked “private” in the I&R search.

**Save**
The **Save** button saves text entered in the **Data Notes** open text field.

**Approve-Push to Live**
When satisfied that the information in the **Admin** screen and other service listing tabs is complete and accurate, the user with the appropriate level of permissions can click on the **Approve – Push to Live** button. On both the consumer site and the professional site, this moves all updated information from pending status to live, and the new or updated version will appear in listings on the consumer site.

If you do not see this button on your screen, you do not have the permission to publish listings on the live site. Any listings you enter or revise will go into the queue before appearing on the live site.
Agency Information (Updating an Agency)

If you want to update the information associated with an agency, you can access the main Agency Information page in a few different ways.

If you are already updating a listing and want to update the agency to which the listing belongs, you can click the Agency Information tab at the top left of the page.

If you want to edit the agency with which your account is associated, you can also return to the Main Menu and click on the Agency Information button.
(Note: if you enter from the main menu, you will probably see a page of instructions that recap much of the information contained here. This page will continue to appear when you open Agency Information until you choose not to display it anymore. In order to move past this page, simply click the Continue button at the bottom of the page).

The main Agency Information page looks like this:

On this page, you can enter information about an agency. As stated above, if you change an address on the agency page, the addresses on all the services that share an address with the agency will change as well.

In order to see a list of all the services associated with an agency, you can go to the next tab, Summary of Service Listings.
On this tab, you can see the services associated with an agency. You can also edit and delete listings, using the links at the right. If you want to create a new listing that shares most of its information with another listing, you can select the existing listing and click **Duplicate Listing**. This will create a clone of the listing, allowing you to rename the new listing and change the necessary information.

The last tab in this section is the **Service Listing Contacts** tab.

This lists the contacts that are associated with listings in this agency (those added as Administrative Contacts in the Information tab). On this screen, you can add new contacts, edit existing contacts, and delete contacts (however, you cannot delete a contact who is still associated with a listing).
Adding a New Agency

The **System Admin** Tool allows users to add new agencies. Not every user in the NY Connects has access to this tool; if you do not, you can disregard this section of the manual.

When you click on the **System Admin** button in the Main Menu, you will see this screen:

If you click **View Agencies**, you will see a list of all the agencies in your account and the date they were last modified.
Click the pencil icon if you want to edit an agency’s information.

**NOTE:** Do **not** click the trash can icon on the right unless you are sure that you want to delete the agency. If you click this icon, there is no way to recover the agencies and listings you delete.

If you would like to add a new agency, click the **Add New Agency** link on the Admin tab:

Doing so will open a tab where you can enter the name and address of the agency you would like to add. Once you have entered the information, click **Save Changes**.
A new button will appear named **Add New Listing for [“Name of the New Agency”]**.

If you would like to add a new listing for the agency you have just created, you can click this button, which will bring up a service listing screen like the one described earlier in this manual.
From here, you can enter information about the service as before.
Additional Tips

**Agency**: An agency is considered as the organization that operates specific programs or services. When creating an agency profile, try to use the most complete agency name possible. For example, it is best to enter a department of social services by its complete name (ABC County Department of Social Services) to avoid confusion with a different department of social services. If there is an agency that is known in the community by a “nickname,” (for example, if there’s an agency called Friends Association for Seniors, which the providers in your community just call “Friends”), enter the full agency name in the Agency name field, then enter the “nickname” in the Alternate Name field on the agency tab.

**Service Listing**: A service listing is a profile of the specific services or programs that any given agency operates. The creation and naming of service listings can be a fairly subjective exercise, so before you create service listings for any agency, think about what the agency does and how best to present what goes on in or at an agency to people who may know nothing about the long-term care or health and human services environment.

The first question that relates to service listings is: **How many or which listings should I create for this agency?** Some service listings will be pretty straightforward. For example, let’s say an agency called All Day Adult Day Services offers two basic services to the public: social adult day care and respite care. Presumably, these services are very similar, but they may have slightly different rates, hours, intake, or eligibility criteria. While you could create only one listing for Adult Day Services, it might be better to create two listings and include one for Respite Care. That way, a caregiver who knows she needs respite care might be more likely to find the service via the consumer website.

Each program or service that has a distinct unit or goal should be given a separate listing, so that consumers can learn about the service, rather than just the agency. Think about an area agency on aging and how it divides and presents its services to the public. It is highly probable that when analyzing the services offered by an AAA, you might create listings for: Congregate Meals, Information and Assistance, Home-Delivered Meals, Care Coordination, Health Insurance Counseling, In-home Services, and perhaps Volunteer Opportunities and many other programs.

The second question with regard to service listings is: **What should I call the actual listing?** This is a bit trickier and will vary from listing to listing. Some programs or services come with “brand” names or names that are easily recognized such as “Better Breathers,” “Retired Senior Volunteer Program” or “Young at Heart Club.” Other listings’ names will be more generic – for example, an AAA that operates an employment program for seniors might simply call the service “Senior Employment.”

Finally, in order to ensure that users looking for a particular kind of service are able to locate it, you should consider which program type to assign to a service. When selecting a program type,
think about what the core or primary service being provided is. Again, this area can be fairly subjective, and different people may approach this kind of indexing differently.

One important thing to remember is not to select a program type or create a listing for secondary or ancillary services. Secondary services are those services or aspects of a service that are offered to enrollees, but not the general public. About secondary services, Margaret Bruni, author of the well-known issue paper *Indexing with the AIRS/INFO LINE Taxonomy* explains, “It’s not always easy to distinguish which of an agency’s services should be indexed. One important distinction is between primary services and secondary services. Primary services are those entry-point services that a person can receive without already being involved with the agency in some way. Secondary services, in contrast, are only available to people who are already receiving another service from the agency.”

For example, if an employment program offers child day care to its participants’ children and only its participants’ children, then the child day care is considered to be a component of the employment service. Similarly, if an adult day service offers support groups to caregivers of its participants, but not to those caregivers who do not use the adult day services, then you would not create a listing for “support group.”

Ancillary Services are primary services that may not be worth indexing for the purpose at hand. About ancillary services, Bruni writes, “Some primary services are simply less important than others. The indexer must decide which services deserve the time and effort it takes to gather relevant information, prepare a written description, and index, and which are not. Some examples of ancillary services which don't have to be indexed include: newsletters; speakers; services which have incredibly long waiting lists; and services which are provided so infrequently, to such a limited extent (or to such a narrow target group) that they would rarely be used by referral staff.”