



NY Connects User Manual

Listing Maintenance



NEW YORK STATE



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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.

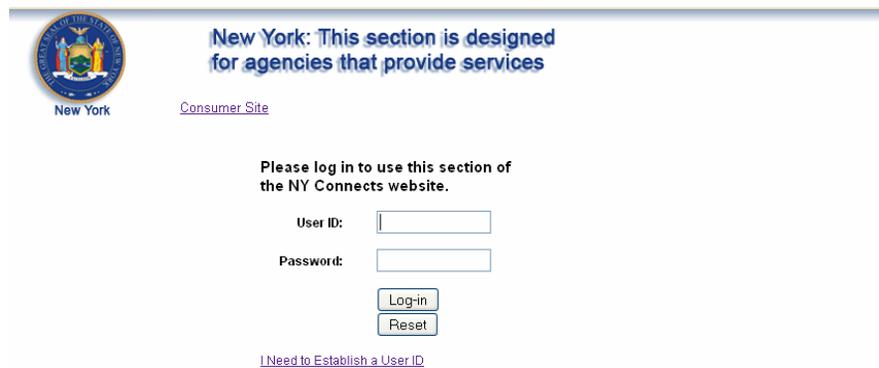
Since you will probably more often be updating information about specific services (rather than agencies), this manual will discuss the process of adding and editing services listings first, then the process of adding and updating agencies.

Logging in to the Listing Maintenance tool

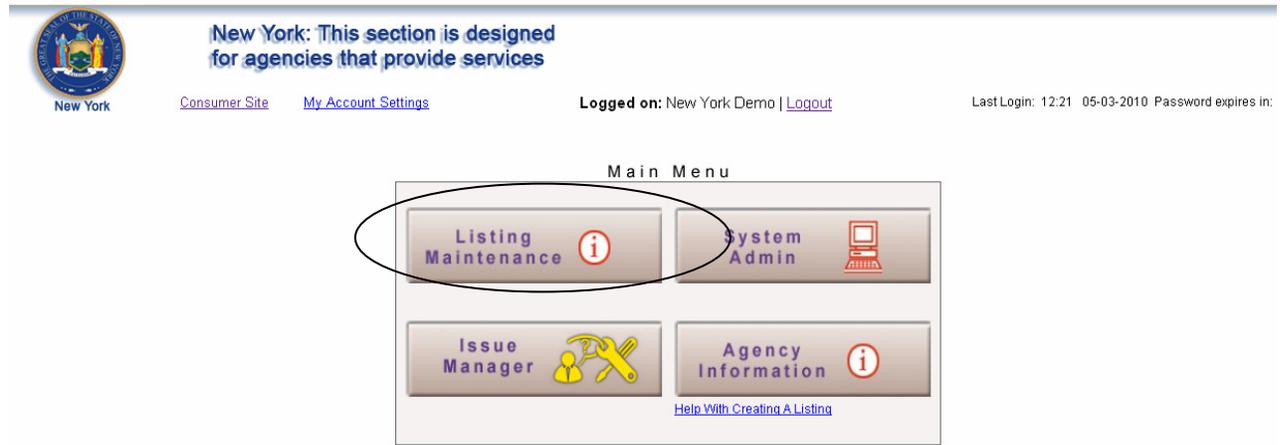
At the training you attended, you received a URL to the login page. Once the NY Connects site is live, you will also be able to reach the login page from the home page.



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

Listing Maintenance
TIP: Type in the first few letters of your search for better search results

Filter by

Listing Name

Agency Name

Service Area

Program Type (Taxonomy Code)

Status

Program Type (Keyword)

Target Group

Date Range
(for listings added, updated, or approved in specified range)
 Between / / and / /

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.

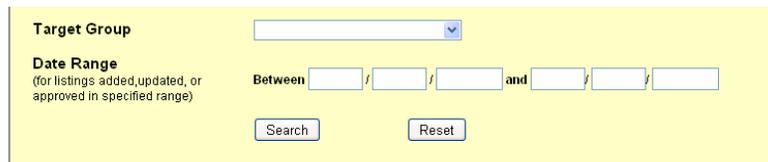
Entering a specific range of dates: (e.g., 1/1/2008 and 1/1/2009) will bring up listings updated between January 1, 2008 and January 1, 2009, inclusive.

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.



The screenshot shows a search form with a yellow background. At the top left is a 'Target Group' label next to a dropdown menu. Below it is a 'Date Range' label with a sub-label '(for listings added, updated, or approved in specified range)'. To the right of the 'Date Range' label is the text 'Between' followed by three input fields for month, day, and year. This is followed by the text 'and' and another three input fields for month, day, and year. At the bottom of the form are two buttons: 'Search' and 'Reset'.

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:

[Return to Listing Maintenance Search](#)

Total Listings Returned: 3652

[Toggle Contact](#)

Listing Name	Listing Number	Agency Name	Program Type	Date Updated	Status	Address	Service Area
24-Hour Information		AMERICAN CANCER SOCIETY -	Information and Referral		Active	101 John James Audubon Parkway, Amherst, NY, 14228	Cattaraugus, Chautauqua, Erie, Genesee, Niagara, Orleans, Wyoming
Accessibility products		Eazylift Stairlifts -	Home Maintenance Rehab	04-15-2010	Active	2141 Central Avenue, Schenectady, NY, 12304-4405	Columbia
Access to Home Program		People, Inc. -	Assisted Living		Active	280 Spindrift Drive, Amherst, NY, 14221	
Access to Independence		Access to Independence -	Health Insurance Information		Active	26 North Main Street, Cortland, NY	
Adaptive Equipment Loan		Finger Lakes Independent Center (FLIC) -	Assistive Devices	12-22-2009	Active	215 Fifth St., Ithaca, NY, 14850	
Adult Abuse		Saratoga County Department of Social Services -	Adult Protective Services	02-08-2010	Active	152 West High Street, Ballston Spa, NY, 12020	
Adult and Day Services		Active Day Seniors Program - Lutheran Care -	Adult Day Programs (Social)		Active	108 - 110 Ulica Rd., Clinton, NY, 13323	
Adult and Day Services		AVA Dorfman Sr. Center -	Adult Day Programs (Social)		Active	305 E. Locust St., Rome, NY, 13440	Oneida
Adult and Day Services		Cosmopolitan Center Inc. -	Adult Day Health Care Programs		Active	1430 Elm St., Ulica, NY, 13501	Oneida
Adult and Day Services		Loretto Ulica -	Adult Day Health Care Programs		Active		Oneida
Adult and Day Services		Presbyterian Residential Community, Inc. -	Adult Day Health Care Programs		Active	4300 Middle Settlement Rd., New Hartford, NY, 13413	Oneida
Adult and Day Services		Sitrin Health Care Center -	Adult Day Health Care Programs		Active	2050 Tilden Ave., New Hartford, NY, 13413	Oneida
Adult and Day Services		Social Adult Day Care at Presbyterian Residential Community -	Adult Day Programs (Social)		Active	4290 Middle Settlement Rd., New Hartford, NY, 13413	Oneida
Adult and Day Services		St. Luke's Adult Programs -	Adult Day Health Care Programs	9-2010	Active	2521 Sunset Avenue, Ulica, NY, 13501	Oneida
Adult and Day Services		Resource Center for Independent Living -	Adult Day Health Care Programs		Active	1607 Genesee St., Ulica, NY, 13501	Oneida
Adult and pediatric registered nurse		PSA HealthCare -	Adult Day Health Care Programs		Active	2250 Wehrle Drive, Suite 1, Williamsville, NY, 14221	Niagara
Adult Care Facilities		Applegate Manor -	Adult Residential Care Homes		Active	400 Ohio Street, Medina, NY, 14103	Orleans
Adult Care Facilities		Cloverhill Adult Residence -	Adult Residential Care Homes		Active	355 South Main Street, Albany, NY, 12211	Orleans

Click on an underlined column name to sort results within that column.

Click on a listing name to edit that listing.

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.

NY Connects
 Agency Information | **Summary of Service Listings** | Service Listing | Service Listing Contacts | [Help With This Page](#)

Logged on: New York Demo | [Log Off](#)

New York Demo Agency
 Check that the basic information below for your agency is accurate and complete, then click Continue at the bottom of the page.

Last Updated: Monday, May 03, 2010
 By: NY Demo Agent 1

Name: New York Demo Agency
 Website: www.nysofa.org
 Agency Number: NY14344
 Address: 145 State St.
 Mail City: State: NY
 City/County: Albany Zip: 12201
 County Code: 01
 Main Phone #: 518 555 5151 ext. 206
 Fax: 518 555 5050 (Click to add more numbers)
 800 555 5185 Toll Free delete
 Brief Description of Agency: Serving the Long term care facilities for the elderly and disabled.
 ADA Accessible? Yes Fully Elevator No
 Where Service is Provided: Consumer's Home
 Service Area: Allegany, Bronx, Broome, Cattaraugus, Albany

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

Agency Information | Summary of Service Listings | **Service Listing** | Service Listing Contacts

New York Demo Agency

CURRENT SERVICES AND PROGRAMS:
 Each service/program your agency provides is listed separately on GetCare so that it can be easily found in searches. The services below are the only ones currently listed for your agency.

- To add a service or program that is not listed, click "Add New Service Listing" at the bottom of this screen and complete information on steps #1 - 6 under the "Service Listing" tab.
- To see how a service is currently displayed, click "View"
- To change information about a particular service, click "Edit"
- To exit this process, click "Log Off" at the top and we'll see you next time!

Select All
 Hospice Care [View](#) [Edit](#) [Delete](#) [Duplicate Listing](#)
 NY Connects Demo Service [View](#) [Edit](#) [Delete](#) [Duplicate Listing](#)

[Add New Service Listing](#) | [Address](#) | [Service Area](#) | [Web Site](#) | [Description](#) | [All](#) [Return to top](#)

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 to you 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

Agency Information	Summary of Service Listings	Service Listing	Service Listing Contacts
1 - Information	2 - Location	3 - Target Population	4 - Availability
5 - Cost	6 - Quality	Admin	
Step 1 ▶ Step 2 ▶ Step 3 ▶ Step 4 ▶ Step 5 ▶ Step 6			
Name of Service	NY Connects Demo Service		Listing Number
Also Known As			
Detailed Description of Service (as you want it displayed)	Serving long term care facilities for the elderly and disabled.		
	Spell Check		
Alert Description	<input type="text"/> <input type="checkbox"/> Activate		
Associated Agency	NY Demo Agency		
Business Type	<input type="text"/>		
Website (if different from agency)	nydemoagency.org		
Administrative Contact (for updating information)	John M. Smith	Pick name from list or to add a new name to the list, click Add Contact	How often do you want email reminders to update this listing? Annually
Save and Continue		Reviewed - No Changes	
View Revised Service Listing View Current Service Listing			

Notice that there are two sets of tabs on this screen. The top set of tabs deals with the information specific to the agency, while the second (numbered) set of tabs deals with information specific to one of that agency’s services.

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.

Administrative Contact (for updating information)	John M. Smith	Pick name from list or to add a new name to the list, click Add Contact	How often do you want email reminders to update this listing? Annually
Save and Continue		Reviewed - No Changes	
View Revised Service Listing View Current Service Listing			

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

Agency Information		Summary of Service Listings		Service Listing		Service Listing Contacts	
1 - Information	2 - Location	3 - Target Population	4 - Availability	5 - Cost	6 - Quality	Admin	
Step 1 ▶ Step 2 ▶ Step 3 ▶ Step 4 ▶ Step 5 ▶ Step 6							
Name		NY Connects Demo Service					
		Existing Service Delivery Site		Peach Tree ▼			
Address Edit	2346 Peach Tree St. Ste. 323		Main	(324)134-1232		delete	
			Fax			delete	
City		San Joaquin		State		NY	
City/County		Other		Zip			
Mailing Address				Mailing State		NY	
Mailing City/County		Other		Mailing Zip			
Is Your Facility ADA (Americans with Disabilities Act) Compliant? <small>(Select N/A if you do not provide services in-house or are not required to be accessible.)</small>		Yes Fully ▼		Equipped with Elevator(s)?		Yes ▼	
Accessible to Public Transportation		<input type="checkbox"/>		Provides Transportation to/from Service?		<input type="checkbox"/>	
Where Service is Provided		On site Consumer's Home Telephone					
Service Area * <small>(Select all cities and all counties where this service is provided)</small>		Areas to Select From		ADD =>		Areas Selected	
		Otego Putnam Queens Richmond Rockland		REMOVE <=		Albany Rensselaer	
		<small>* To select multiple entries, hold the "Ctrl" (PC) or "Cmd" (Mac) key and click Select all cities and counties where this service is provided</small>					
Save and Continue				Reviewed - No Changes			
		View Revised Service Listing View Current Service Listing					

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.

Name		NY Connects Demo Service	
		Existing Service Delivery Site	Peach Tree ▾
Address [Edit]	2346 Peach Tree St.	Main	324 134 1232 ext.
	Ste. 323	Fax	
Service Delivery Site: (Please enter the name of a new site as well as its address information in the appropriate fields. You can also select an existing site address from the dropdown provided.)		<input type="text"/> ←	
City	San Joaquin	State	NY ▾
City/County	Other ▾	Zip	<input type="text"/>

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.

Service Area * (Select all cities and all counties where this service is provided)	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Areas to Select From</p> <ul style="list-style-type: none"> Otsego Putnam Queens Richmond Rockland </div> <div style="width: 10%; text-align: center;"> <p>ADD =></p> <p>REMOVE <=</p> </div> <div style="width: 45%;"> <p>Areas Selected</p> <ul style="list-style-type: none"> Albany Rensselaer </div> </div> <p><small>* To select multiple entries, hold the "Ctrl" (PC) or "Cmd" (Mac) key and click</small></p> <p>Select all cities and counties where this service is provided</p>
--	--

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

The screenshot shows the 'Availability' tab in the NY Connects system. At the top, there are navigation tabs: 'Agency Information', 'Summary of Service Listings', 'Service Listing', 'Service Listing Contacts', '1 - Information', '2 - Location', '3 - Target Population', '4 - Availability', '5 - Cost', '6 - Quality', and 'Admin'. Below these is a progress indicator: 'Step 1 > Step 2 > Step 3 > Step 4 > Step 5'. The main heading is 'NY Connects Demo Service'. A date range selector is present: 'If seasonal, specify dates from: []/[]/[] to: []/[]/[]'. Below this is a 'Program Hours of Operation' section with a checkbox 'Check here if 24/7 or complete the forms below.' and a link 'Fill Default'. A table follows with columns for 'Day', 'Open', and 'Close'. The 'Open' and 'Close' columns contain time pickers (hour, minute, AM/PM). Below the table is a text area for 'Additional Comments on Hours of Operation'. To the right, there are sections for 'Capacity' (with 'Spaces Available' and 'Beds Available' fields), 'Current Availability' (with radio buttons for 'Space Available', 'Call to Check', 'No Space Available', 'Wait List', and 'N/A'), 'How to access services' (with 'When can consumers expect to be contacted?' dropdown and 'Describe your intake process and the time it takes:' text area), and 'Intake Contact (Consumer Contact for This Service)' (with a dropdown and 'Add Contact' link). At the bottom, there are two buttons: 'Save and Continue' and 'Reviewed - No Changes'.

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.

Agency Information	Summary of Service Listings	Service Listing	Service Listing Contacts
1 - Information	2 - Location	3 - Target Population	4 - Availability
		5 - Cost	6 - Quality
			Admin

Step 1 ▶ Step 2 ▶ Step 3 ▶ Step 4 ▶ Step 5 ▶ **Step 6**

NY Connects Demo Service

Is service listing licensed? <input type="checkbox"/> add more licenses	N/A License date: [] [] [] [] Lic. #: [] Licensing body: []
Is service listing certified? <input type="checkbox"/> add more certifications	N/A Certification date: [] [] [] [] Cert. #: [] Certification body: []
Is service listing accredited? <input type="checkbox"/> add more accreditations	N/A Accreditation date: [] [] [] [] Accr. #: [] Accreditation body: []
Is service listing Bonded?	N/A Ever denied a bond? N/A
Do you have a procedure for consumers to report problems?	N/A If yes, please describe: []

Save and Continue Reviewed - No Changes
[View Revised Service Listing](#)
[View Current Service Listing](#)

The Admin Tab

Required elements: Program Type (Taxonomy Code)

Agency Information		Summary of Service Listings		Service Listing		Service Listing Contacts	
1 - Information	2 - Location	3 - Target Population	4 - Availability	5 - Cost	6 - Quality	Admin	
NY Connects Demo Service							Status: Pending Initial Approval
Program Type (Taxonomy Code)							
<input type="text"/> <input type="button" value="ADD =>"/> <input type="button" value="REMOVE <="/> <input type="button" value="↑"/> <input type="button" value="↓"/>							
Target Population							
<input type="text"/> <input type="button" value="ADD =>"/> <input type="button" value="REMOVE <="/> <input type="button" value="↑"/> <input type="button" value="↓"/>							
Listing Number:	<input type="text"/>	Agency ID:	374929	Completion Score:	3		
Date Created:	December 11, 2009	Created By:	New York Demo	Source:	<input type="text"/>		
Last External Update:		External Update By:					
Last Formal Update Date:		Last Formal Update By:		Update Source/Type:			
Last Approved:		Approved By:					
Deleted:		Deleted By:		Reason for Deletion:			
United Way:	<input type="text"/>	Private <input type="radio"/> Public <input checked="" type="radio"/>					
Data Notes:	<input type="text"/>						
<input type="button" value="Save"/>		<input type="button" value="Mark as Formal Update"/>			<input type="button" value="Approve-Push to Live"/>		
<input type="button" value="De-activate"/>							

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

- D – Consumer Services
- F – Criminal Justice and Legal Services
- H – Education
- J – Environmental Quality
- L – Health Care
- N – Income Support and Employment
- P – Individual and Family Life
- R – Mental Health Care and Counseling
- T – Organizational / Community / International Services

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:

- YB – Age Groups
- YD – Caregivers
- YF – Diseases / Disabilities
- YH – Ethnic Groups / National Origin
- YK – Family Relationships
- YL – Income / Employment Status
- YN – Military Personnel
- YQ – Organizational / Practitioner Perspectives
- YX – Victims / Survivors
- YZ – Topical Identifiers/Issues

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.



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.

Completion Score:	9
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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
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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
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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**.

Last External Update:		External Update By:			
Last Formal Update Date:		Last Formal Update By:		Update Source/Type:	
Last Approved:		Approved By:			

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:

Deleted:		Deleted By:		Reason for Deletion:	
-----------------	--	--------------------	--	-----------------------------	--

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.

Agency Information | Summary of Service Listings | Service Listing | Service Listing Contacts

1 - Information | 2 - Location | 3 - Target Population | 4 - Availability | 5 - Cost | 6 - Quality | Admin

NY Connects Demo Service Status: Pending Initial Approval

Program Type (Taxonomy Code)

B-Basic Needs | BT-Transportation | BT-4500-Local Transportation

BT-4500.4500-Transportation
BT-4500.6500-500-Medical Transportation
BT-4500.6500-800-Senior Ride Programs
BT-4500.6500-Paratransit Programs

ADD => REMOVE <=<

BT-4500.6500-170-Disability Related Transportation
Disability Related Transportation

Target Population

YB-Age Groups | YB-9500-Youth | YB-9500.1500-Children

ADD => REMOVE <=<

Listing Number:		Agency ID:	374928	Completion Score:	3
Date Created:	December 11, 2009	Created By:	New York Demo	Source:	
Last External Update:		External Update By:			
Last Formal Update Date:		Last Formal Update By:		Update Source/Type:	
Last Approved:		Approved By:			
Deleted:		Deleted By:		Reason for Deletion:	
United Way:		Private	<input type="radio"/>	Public	<input checked="" type="radio"/>

Data Notes:

Save | De-activate | Mark as Formal Update | Approve-Push to Live

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:

Agency Information		Summary of Service Listings	Service Listing	Service Listing Contacts	Help With This Page
RTZ Associates Inc.					
Check that the basic information below for your agency is accurate and complete, then click Continue at the bottom of the page.					
				Last Updated: Tuesday, December 01, 2009 By: New York Demo	
Name	NY Demo Agency				
Website	nydemoagency.org				
Agency Number					
Address					
Mail City		State	NY		
City/County	Montgomery	Zip			
Main Phone #	111	222	2222	ext. 2222	
Fax	333	333	3333	⊞ (Click to add more numbers)	
	444	444	4444	Afterhours	⊞ delete
Brief Description of Agency	Serving long term care facilities for the elderly and disabled.				
ADA Accessible?	Yes Partially	Elevator	Yes		
Where Service is Provided	Consumer's Home				
Service Area *	Albany Allegany Bronx Broome Cattaraugus		ADD => REMOVE <=	Montgomery	
* To select multiple entries, hold the "Ctrl" (PC) or "Cmd" ⌘ (Mac) key and click					
Alternate Name					
Alternate Address					
Alternate Mail City		Alternate State	NY		
Alternate City/County	Albany	Alternate Zip			
Alternate Main				ext.	
Alternate Fax					
Continue					

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**.

Agency Information | Summary of Service Listings | **Service Listing** | Service Listing Contacts

NY Demo Agency

CURRENT SERVICES AND PROGRAMS:

Each service/program your agency provides is listed separately on GetCare so that it can be easily found in searches. The services below are the only ones currently listed for your agency.

- To add a service or program that is not listed, click "Add New Service Listing" at the bottom of this screen and complete information on steps #1- 6 under the "Service Listing" tab.
- To see how a service is currently displayed, click "View"
- To change information about a particular service, click "Edit"
- To exit this process, click "Log Off" at the top and we'll see you next time!

<input type="checkbox"/> Select All	
<input type="checkbox"/> NY Connects Demo Service	View Edit Delete Duplicate Listing

[Add New Service Listing](#) | [Address](#) | [Service Area](#) | [Web Site](#) | [Description](#) | [All](#)
[Return to top](#)

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.

Agency Information | Summary of Service Listings | Service Listing | **Service Listing Contacts**

NY Demo Agency Contacts

Contacts	Associated Listings
Smith, John M. jsmith@mail.com 555 234-2352	NY Connects Demo Service
Edit Contact Delete Contact Add New Contact	

Coordinating Entities	Associated Listings
Add New Entity	

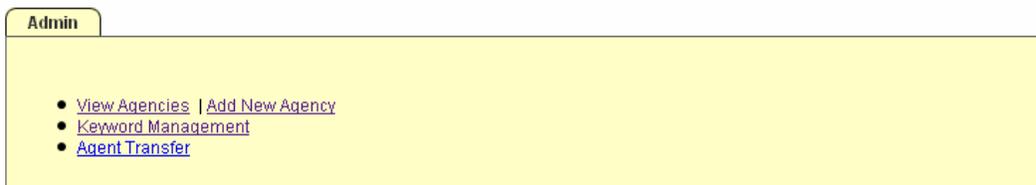
This lists the contacts that are associated with listings in this agency (those added as Administrative Contacts in the Information tab). On this screen, you can add new contacts, edit existing contacts, and delete contacts (however, you cannot delete a contact who is still associated with a listing).

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.

Admin

Filter by first character of name - [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [J](#) [K](#) [L](#) [M](#) [N](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [W](#)

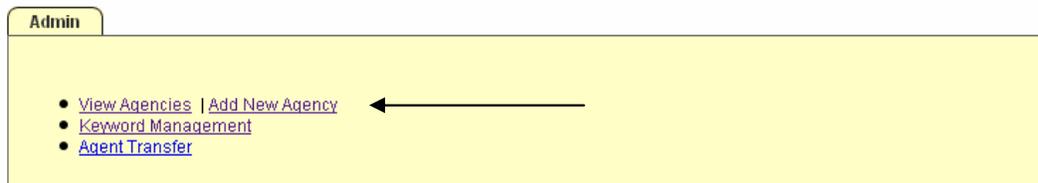
Last Modified	Agency Name	Sort by: Agency Name	Agency Number	Add New
12-02-2009				 
11-18-2009	A			 
11-17-2009	ACCESS TRANSPORTATION, INC			 
11-18-2009	AMERICAN CANCER SOCIETY			 
11-17-2009	AMSTERDAM MEMORIAL ADULT DAY HEALTH CENTER			 
11-17-2009	ARKELL ADULT CARE FACILITY			 
11-17-2009	ARKELL CENTER, INC			 
10-28-2009	Alzheimer's Association (Rochester Chapter)			 
11-18-2009	a			 
11-19-2009	a		MONTO007	 
11-18-2009	a			 
11-18-2009	a bb			 
11-18-2009	aaaaa			 
11-18-2009	aaaaa aaaa			 

Save Changes

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**.

The screenshot shows the 'Admin' section of the interface. It contains several input fields for agency information: Agency Name (filled with 'NY Connects Sample Agency'), Address (filled with '124 Main St.'), City (filled with 'Albany'), State (dropdown menu with 'New York' selected), Zip, City/County (dropdown menu), and URL. A 'Save Changes' button is located at the bottom right of the form. An arrow points from the right side of the page towards this button.

Date Added	Name	Sort By:	Username	Permissions

A new button will appear named **Add New Listing for [“Name of the New Agency”]**.

This screenshot shows the same 'Admin' page as above, but with a new button that has appeared: 'Add New Listing for 'NY Connects Sample Agency''. This button is circled in black. Other elements visible include the 'URL' field, a checkbox for 'Partner/Sponsor/Endorser', and the 'Save Changes' button. The table below the form now includes an 'Add User' button in the 'Permissions' column.

Date Added	Name	Sort By:	Username	Permissions
				Add User

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.

Agency Information		Summary of Service Listings		Service Listing		Service Listing Contacts							
1 - Information		2 - Location		3 - Target Population		4 - Availability		5 - Cost		6 - Quality		Admin	
Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6													
Name of Service		NY Connects Sample Agency						Listing Number					
Also Known As													
Detailed Description of Service (as you want it displayed)													
		Spell Check											
Alert Description												Activate <input type="checkbox"/>	
Associated Agency		NY Connects Sample Agency											
Business Type		<input type="text" value=""/>											
Website (if different from agency)		<input type="text" value=""/>											
Administrative Contact (for updating information)		<input type="text" value="----- select -----"/>		Pick name from list or to add a new name to the list, click Add Contact						How often do you want email reminders to update this listing?		<input type="text" value="Annually"/>	
Save and Continue										Reviewed - No Changes			
View Revised Service Listing View Current Service Listing													

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."