



Please select the MRSS Data Management System release below to read through what updates are associated to it:

## Table of Contents

Release: 1.4.....	2
Release: 1.3.....	5
Release: 1.2.....	8
Release 1.1.1 - Hotfix.....	9
Release: 1.1.....	10
Release 1.0.2 - Hotfix.....	11

## Release: 1.4

Release Date: November 30, 2022

### I. Feature Updates for Call Center Agents

#	Title	Feature Description	Affected Feature
1	<b>Added Field to Show Encounter Origination Source</b>	Added the “Origination Source” field to the Encounter Header to show whether an Encounter was created by the MRSS Call Center or Provider.	Encounter
2	<b>Updated Encounter Fields</b>	The following changes were made to Encounters: <ul style="list-style-type: none"> <li>• Removed the “Email of Caller” field</li> <li>• Updated the “Caller Type” selection options</li> <li>• Updated the “Referral Source” selection options</li> <li>• Updated the “Primary Reason for Call” selection options</li> </ul>	Encounter
3	<b>Updated Person Account Fields</b>	The following changes were made to Person Account fields: <ul style="list-style-type: none"> <li>• Updated the “Gender” selection options</li> <li>• Updated the “Race” selection options</li> <li>• Updated the “Ethnicity” selection options</li> </ul>	Person Account

### II. Feature Updates for Providers

#	Title	Feature Description	Affected Feature
1	<b>Added Field to Show Encounter Origination Source</b>	Added the “Origination Source” field to the Encounter Header to show whether an Encounter was created by the MRSS Call Center or Provider.	Encounter

#	Title	Feature Description	Affected Feature
2	<b>Added Ability to Mass Upload Intake Forms or Discharge Forms.</b>	Added the ability to mass upload Intake Forms or Discharge Forms for existing Encounters.	Mass Upload Tab
3	<b>Added Curated views of Call Center Referrals and Encounters</b>	Added the following list views to the Home tab: Recently Created Call Center Referrals, Intake Forms Due This Week, Discharge Forms Due This Week, and Aging Encounters. Information previously found in the Home tab can now be found in the Account Information tab.	Home Tab
4	<b>Removed Buttons from the Encounter Page</b>	The “New Referral” and “New Task” buttons were removed from the Encounter page. These buttons were not relevant to tasks performed by users in the Provider Portal.	Encounter
5	<b>Added Validations when Closing Encounters</b>	<p>Added validations to prevent Encounters with inconsistent data or key data missing from being closed. A warning message will display to inform the user, and the user will have an opportunity to update the information. If the user does not make the necessary updates, an error message will display and prevent the user from closing the Encounter.</p> <p>The date selected in “What date was this child/young adult and/or parent/caregiver(s) first served by your MRSS staff for the current referral?” field (Intake Form) is before or on the date selected in the “Date of last MRSS service provided” field (Discharge Form) and the number of days between the two fields aligns with the selection in “How long was the family engaged in MRSS Service” field (Discharge Form).</p>	Encounter

#	Title	Feature Description	Affected Feature
6	<b>Updated Encounter Fields</b>	<p>The following changes were made to Encounter fields:</p> <ul style="list-style-type: none"> <li>• Removed the “Email of Caller” field</li> <li>• Updated the “Caller Type” selection options</li> <li>• Updated the “Referral Source” selection options</li> <li>• Updated the “Primary Reason for Call” selection options</li> </ul>	Encounter
7	<b>Updated Person Account Fields</b>	<p>The following changes were made to Person Account fields:</p> <ul style="list-style-type: none"> <li>• Updated the “Gender” selection options</li> <li>• Updated the “Race” selection options</li> <li>• Updated the “Ethnicity” selection options</li> </ul>	Person Account
8	<b>Updated Intake Form Fields</b>	<p>The following changes were made to Intake Form fields:</p> <ul style="list-style-type: none"> <li>• Updated the “If the family did not choose MRSS Stabilization Services (4 days or more), what was the reason?” selection options</li> <li>• Updated the “If the family did not sign the consent to contact, what was the reason?” selection options</li> </ul>	Intake Form
9	<b>Removed Field from Discharge Form</b>	Removed the “Please select the service outcome of the referral you are entering.” field from the Discharge Form.	Discharge Form
10	<b>Updated Provider Portal URL</b>	Updated the Provider Portal URL to <a href="https://providers.mrss.ohio.gov">https://providers.mrss.ohio.gov</a>	Provider Portal

## Release: 1.3

Release Date: October 26, 2022

### I. Feature Updates for Call Center Agents

#	Title	Feature Description	Affected Feature
1	<b>Removed Intake Form and Discharge Form from Encounters for Agents and Supervisors</b>	Removed the tabs “Intake Form” and “Discharge Form” from the “Encounter Detail” screen for Agents and Supervisors.	Encounters
2	<b>Added Searching by Birthdate for Existing Person Accounts</b>	Added the ability to search by a person’s birthdate when associating an existing person in the system to an Encounter either via “New Encounter Flow” screens or “New/Update Person” button.	New Encounter Flow New/Update Person
3	<b>Added Close Reason (if applicable) Field to Encounters</b>	Added the “Close Reason (if applicable)” field to Encounters to indicate a special close reason, such as a duplicate Encounter, prior to closing the Encounter.	Encounter
4	<b>Update New Encounter Flow to Allow for “Associate with Person Account” Screen to be Bypassed</b>	Added the “Add Child/Young Adult” checkbox to the New Encounter Flow. This field will be checked by default. If checked, the “Associate with Person Account” screen will be shown. If unchecked, the “Associate with Person Account” screen will be bypassed, and the Encounter will be created without a Person Account. A Person Account can still be added after the Encounter has been created via the “New/Update Person” button.	New Encounter Flow
5	<b>Updated Informational Referral Encounters to not Require a Person Account</b>	Encounters with the “Triage Recommendation” field set to “Informational Referral” do not require an associated Person Account to update the Status to “Closed.”	Encounter

#	Title	Feature Description	Affected Feature
6	<b>Encounter Status will Automatically Update from New to In-Progress on Call Center Referral Creation</b>	The Encounter Status will automatically update from “New” to “In-Progress” once a Call Center Referral is created.	Encounter
7	<b>Added Demographic Information Tab to Encounters</b>	Added the Demographic Information Tab to Encounters. This tab shows the same fields that are shown when the “Name” field is selected on the Encounter. Users can view and update demographic information from the tab.	Encounter
8	<b>Updated Service Type Selection from Adult Mobile Crisis to Other Mobile Crisis</b>	Updated one of the “Service Type” field selections on the Provider Account from “Adult Mobile Crisis” to “Other Mobile Crisis.” Changes will be reflected on Provider Accounts as well as the Provider Search.	Provider Account
9	<b>Corrected Duplicate Person Matching to Catch Duplicates with Same Address</b>	Corrected the Duplicate Person Matching so that when adding a new Person Account with the same first name, last name, and address as an existing Person Account, a message will appear indicating the individual may already be in the system. Users will have the option to proceed with creating the new Person Account or choose the existing Person Account.	New Encounter Flow

II. Feature Updates for Providers

#	Title	Feature Description	Affected Feature
1	<b>Added Searching by Birthdate for Existing Person Accounts</b>	Added the ability to search by a person's birthdate when associating an existing person in the system to an Encounter.	New/Update Person Button
2	<b>Enabled Ability to Create and Export Reports</b>	Enabled the ability to create new reports as well as export reports.	Reports
3	<b>Added Option to Indicate Encounter Close Reason</b>	Added the option to select a close reason when closing an Encounter using the "Close Encounter" button. A close reason is used when an Encounter is closed for any reason besides the completion of MRSS services, such as a duplicate Encounter. Any selections will be visible on the Encounter on the "Close Reason (if applicable)" field.	Encounter
4	<b>Added Warning Message for Missing fields when Closing Encounters</b>	Added a warning message indicating key fields found on the Demographic Information, Intake Form, or Discharge Form tabs that have been left blank when closing an Encounter using the "Close Encounter" button. Users will have the option to input key fields before closing the Encounter. The Encounter can still be closed even if some key fields are blank.	Encounter
5	<b>Added Demographic Information Tab to Encounters</b>	Added the Demographic Information Tab to Encounters. This tab shows the same fields that are shown when the "Name" field is selected on the Encounter. Users can view and update demographic information from the tab.	Encounter
6	<b>Corrected Duplicate Matching to Catch Duplicates with Same Address</b>	Corrected the Duplicate Person Matching so that when adding a new Person Account with the same first name, last name, and address as an existing Person Account, a message will appear indicating the individual may already be in the system. Users will have the option to proceed with creating the new Person Account or choose the existing Person Account.	New/Update Person Button

## Release: 1.2

Release Date: September 28, 2022

### I. Feature Updates for Call Center Agents

#	Title	Feature Description	Affected Feature
1	<b>Updated the Error Messages for Required Fields in New Encounter Flow</b>	Updated the error messages for required fields in the New Encounter Flow making them more user-friendly.	New Encounter Flow
2	<b>Corrected the New Encounter Flow</b>	Corrected the New Encounter Flow to not require the "Name of Caller" field for new Encounter with "Anonymous?" field set as "No" and the "Caller Type" field set as "Child/Young Adult."	New Encounter Flow
3	<b>Corrected Provider Search to Reflect Updates to the "Service Type" Field on the Provider Account</b>	Corrected Provider Search so that updates to the "Service Type" field on the Provider Account are reflected in Provider Search.	Provider Search
4	<b>Added New Fields to Provider Account Details</b>	Added three fields; MRSS Primary Phone, MRSS Afterhours Phone, and Hours of Operation; to the Provider Account Details. The added fields will also show in Provider Search with the Agency name and details.	Provider Account



II. **Feature Updates for Providers**

#	Title	Feature Description	Affected Feature
1	<b>Updated the Error Messages for Required Fields on Encounters</b>	Updated the error messages for required fields on Encounters making them more user-friendly.	Encounter
2	<b>Added New Fields to Provider Account Details</b>	Added three fields; MRSS Primary Phone, MRSS Afterhours Phone, and Hours of Operation; to the Provider Account Details located on the “Home” tab.	Provider Account Details

[Release 1.1.1 - Hotfix](#)

**Release Date:** September 8, 2022

I. **Feature Updates for Providers**

#	Title	Feature Description	Affected Feature
1	<b>Updated Person Account View and Edit Access</b>	Corrected the behavior that only the staff who created the Person Account could view or edit the Person Account, so that all users for a Provider have access to view and edit Person Accounts.	Person Account

## Release: 1.1

Release Date: August 31, 2022

### I. Feature Updates for Call Center Agents

#	Title	Feature Description	Affected Feature
1	<b>Removed Incorrect Errors from the Encounter Flow</b>	Removed two error messages that were incorrectly displayed in the Encounter Flow.	Encounter Flow
2	<b>Updated the Person Account Page Layout</b>	Removed the "MRSS Intake Forms Assigned Clinician" and " MRSS Intake Forms (Supervisor)" panels from the Person Account page layout.	Person Account
3	<b>Updated the Special Alert panel on the Encounter Details Page</b>	Updated the Special Alert panel on the Encounter Details page to display active Special Alerts related to Person Account associated with the Encounter.	Encounters

### II. Feature Updates for Providers

#	Title	Feature Description	Affected Feature
1	<b>Updated the Provider Portal Welcome Email</b>	Updated the subject and body to, "Welcome to MRSS Provider Portal – OhioMHAS" in the Provider Portal Welcome Email.	Welcome Email
2	<b>Updated Assigned Clinician and Supervisor Fields Selection Values</b>	Updated "Assigned Clinician" and "Supervisor" fields, on the Intake Form, to only show Staff Contacts as selection values.	Intake Form
3	<b>Added Family Satisfaction Interview Consent Report</b>	In the "Family Satisfaction Reports" folder on the Reports page, the "Family Satisfaction Interview Consent" report is available.	Reports

## Release 1.0.2 - Hotfix

Release Date: August 10, 2022

### I. Feature Updates for Providers

#	Title	Feature Description	Affected Feature
1	<b>Update the “Provider Affiliation” Field to Auto-Populate for Encounters Created from the Provider Portal</b>	If an Encounter is created through the Provider Portal, the “Provider Affiliation” field auto-populates with the Provider Account from which the Encounter was created after the Encounter is saved.	Encounters
2	<b>Update “Provider Affiliation” Field to be a Required Field for Encounters Created from the Provider Portal</b>	If an Encounter is created through the Provider Portal, the “Provider Affiliation” field is now required when updating the Encounter. This field is not required when first saving the encounter as it will auto-populate with the Provider Account from which the Encounter was created.	Encounters