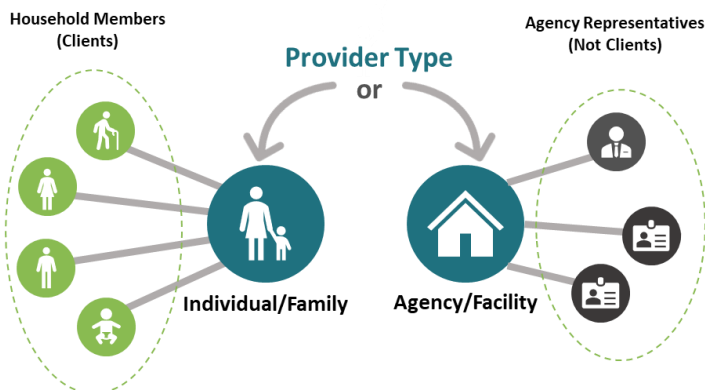


Key Changes to Providers: Provider Type & Client Records for Household Members

This document outlines key changes to Providers that come with **Release 5 of Modernized Trails** - and that revolve around **Provider Type** and the implication to client records.

- Providers will now be classified as either an **“Individual/Family”**-type or **“Agency/Facility”**-type provider in the new **Provider Type** field.
- We currently think of **“Client”** as referring to family members involved in a case or referral. After Release 5 of modernized Trails, think of **“Client”** expanding to include all household members of an **“Individual/Family”**-type provider. Household members will become **Clients** in Trails in order to automatically track referral history for all household members.
- All core service providers and other forms of out-of-home (OOH) providers will be designated as **“Agency/Facility”**-type providers, in which case they will continue to have staff members - now referred to as **“Agency Representatives”**. They will not be created as clients.



Search First to Avoid Duplicating Providers & Clients

- Modernized Trails will require you to first search from existing providers before you can add a new provider.
- Modernized Trails will require you to first search from existing clients when adding a new household member to an **“Individual/Family”**-type provider, before adding a new client record.

Frequently Asked Questions

Q: Which Provider Type should I choose when adding a new provider?

A: Select **“Individual/Family”** for providers whose services correspond with the following combinations of Service Types & Service Categories:

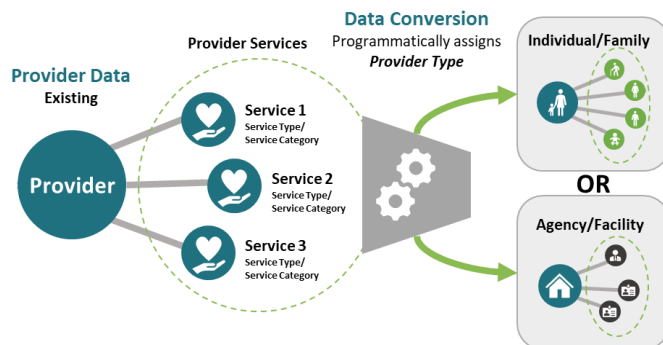
- Out-of-Home (OOH)**
 - Adoption
 - Foster Family Home Care
 - Kinship Foster Care
 - Kinship Care
 - Relative Guardianship
 - Successor Guardian
- Child Care**
 - Day Care Home
 - Day Care Home 3
 - Exempt Facility-Home
 - Infant/Toddler Home
 - Large Day Care Home

For all other service providers including all Core and Child Welfare services providers, select **“Agency/Facility”**.

Also select **“Agency/Facility”** for Child Care providers and Out-of-Home (OOH) providers whose service categories are not listed above.

Q: How is the Provider Type determined for existing providers in Trails?

A: OIT will run a process prior to rollout that evaluates the provider’s service types & service categories for existing providers, and automatically assigns the provider type using the same logic described on the left.



Q: Can I change the Provider Type between “Individual/Family and “Agency/Facility” after the Provider has been created?

No, the **Provider Type** cannot be changed after the provider is created. Enabling changes to Provider Type is being explored for future releases after Release 5.

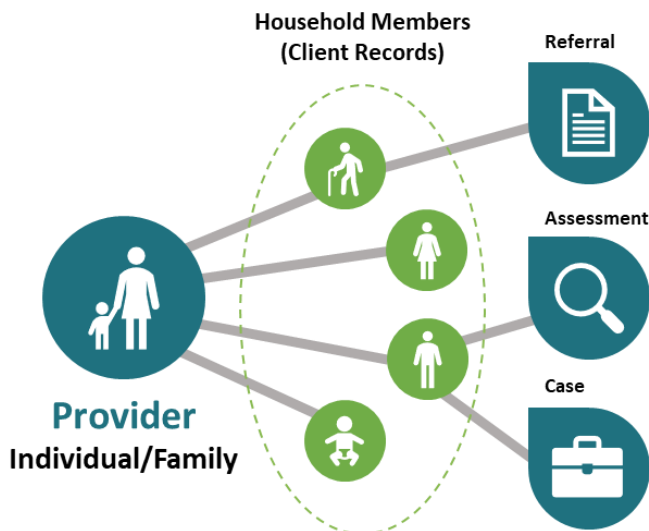
You can submit a Help Desk ticket to make the change or continue to work with the provider as is as it does not impact provider functionality.

Q: Why are household members being added as clients?

A: The reason for creating client records for each family member of an *Individual/Family*-type provider is the need for certification and licensing workers to be aware of the entire referral & assessment history of a family being considered for out-of-home (OOH) placement or child care.

Currently, we know when an institutional referral is received for such providers because the provider itself is attached to the referral. However, if referrals are reported for a provider that involve the provider's biological family, there is no record of this when reviewing the provider. This requires a manual client search be conducted for each family member to ensure that all referrals have been identified.

After Release 5 (Resource), the entire referral history of a prospective provider's household will automatically appear in the modernized Trails provider details - thereby eliminating the need for individualized client-searches for each household member.



Q: Who in an Individual/Family-type provider's household should be added as clients?

A: Any person living in the household (excluding foster children) should be added as a client, including:

- the applicants
- any biological or adoptive children in the home
- any other adult family members living in the home
- any other children per statute

Q: How will client records be created for household members of existing providers in Trails?

A: OIT will run a process prior to rollout that will either:

- match household members to existing clients,
- or, create new client records if no match is found

... but only for "Individual/Family"-type providers.

Q: When adding an "Individual/Family"-type provider, can I / should I first add the household members as clients before attempting to add the provider?

No, the clients do not need to be created beforehand. The process by which you create an "Individual/Family"-type provider in modernized Trails will automatically guide you through the process of searching for or creating clients for the applicants and household members.

Q: Can an Individual/Family-type provider be created without any household member / client record?

No, at a minimum an "Individual/Family"-type provider must have at least one client record - corresponding with the first applicant.

Q: Can household members be added to Agency/Facility-type providers?

No, household members / clients cannot be added to Agency/Facility-type providers. Instead, agency representatives are added.

Q: What should be done if a worker adds the wrong client as a household member onto a provider?

A: The worker should end date that client for the same day that it was added as a household member on the provider. Then have a Help Desk ticket submitted to remove the household member from the provider.

Functionality does not exist to remove household members from a provider, but it is being explored for future releases.

Training Materials

Job Aids, PDF documents with step-by-step instructions on the use of modernized Trails are available on the Colorado Child Welfare Training System (CWTS) website at:

<https://coloradocwts.com/trails-resource/trails-modernization>

Links to Provider-related Job Aids

- ❖ [Access and View Provider Details](#)
- ❖ [Add Provider](#) (DCW Licensing & Certification Coordinator)
- ❖ [Add Provider](#) (County Certification Worker)
- ❖ [Add Provider](#) (County Kinship Worker)
- ❖ [Access and View Provider Details](#)
- ❖ [Manage Individual/Family Provider Summary](#)
- ❖ [Manage Provider Household Members](#)
- ❖ [Manage Agency/Facility Provider Summary](#)
- ❖ [Manage Provider Agency/Facility Representatives](#)
- ❖ [Access and View Referrals](#)