

Release 5: Resource - Functions in Legacy vs. Modernized Trails

Release 5 of modernized Trails will affect Resource, Provider and Incidents.

- This document lists in detail which functions will be available in legacy Trails and/or modernized Trails after Release 5.
- This document focuses only on the processes covered under these areas and is not comprehensive of all processes done in either legacy or modernized Trails.
- This document includes a link to any relevant training documentation for the corresponding modernized Trails functionality.

Refer to the legend below to understand what each status means.

Retained	Existing functionality that will continue to be available in legacy Trails after Release 5.
Enabled	Existing functionality that will be available in modernized Trails after Release 5.
New	New functionality in modernized Trails that does not exist in legacy Trails.
Read Only	Existing functionality that will be disabled/discontinued become read-only in legacy Trails after Release 5.
Not Enabled	Existing functionality that will not be available in modernized Trails after Release 5 but may come in a future release. Functionality will continue to be done in legacy Trails.
N/A	Functionality that does not exist in the specified version of Trails

Ref#	Function	Legacy Trails	Modernized Trails	Link to Trails Mod Training Document
Search				
1.01	Search Clients	Retained	Enabled	View
1.02	Search Providers	Retained	Enabled	View
1.03	Search Incidents	Retained	Enabled	County DCW DYS Provider
1.04	Search for Provider Incidents (by Client/Staff/Date)	Retained	Enabled	View
Providers				
2.01	Add a Provider	Read Only	Enabled	View
	Provider Type: Individual/Family vs. Agency/Facility	N/A	New	View
	Household Members are Client Records	N/A	New	View
2.02	Manage Provider Summary Information (Edit/View)	Read Only	Enabled	Individual/Family-type or Agency/Facility-type
	Manage Phone Numbers (Add/Edit/View History)	Read Only	Enabled	
	Manage Email Addresses (Add/Edit/View History)	Read Only	Enabled	
	Manage Addresses (Add/Edit/View History)	Read Only	Enabled	
	Manage Governing Bodies (Add/Edit)	Read Only	Enabled	
2.03	Manage Individual/Family-type Provider Household Members (Add/Edit)	Read Only	Enabled	View
2.04	Manage Agency/Facility Representatives (Add/Edit/Delete)	Read Only	Enabled	
2.05	Manage Inquiries (Add/Edit/Close)	Read Only	Enabled	View
2.06	Manage Kin Needs Assessment (Add/Edit/Delete)	Read Only	Enabled	View
2.07	Manage Provider Placements	Read Only	Enabled	View
	View Placements (only for OOH & Kinship services)	Read Only	Enabled	View
	Edit a Placement Type and/or Status	Read Only	Enabled	View
	View Placement Status History	Read Only	Enabled	View
2.08	Manage Contacts/Visits, Notes and Frameworks	See Details	Enabled	View
	Manage Notes (Add/Edit)	Read Only	Enabled	View
	Manage Contacts/Visits (Add/Edit/Delete)	Read Only	Enabled	View
	Manage Frameworks (Add/Edit/Delete)	N/A	New	View
	Copy/Paste Framework Participants	N/A	New	View
	View/Print Contact Log	Read Only	Enabled	View
2.09	View Provider Referrals	Read Only	Enabled	View
2.10	Transfer Provider (We will no longer need to transfer providers; only services)	Read Only	N/A	N/A
Service Categories/Types				
Service categories/types for a specific Provider				
3.01	Manage Provider Services (Add/Edit/Delete)	Read Only	Enabled	View
	Terminology Change: "Case Services" → "Child Welfare Services"	Read Only	New	N/A
	Manual entry of contract service detail under provider (Will not be auto populated in modernized Trails)	Read Only	N/A	N/A
3.02	Assign a Service (to a primary/secondary worker)	Read Only	Enabled	View
3.03	Transfer a Service (to a county/agency)	Read Only	Enabled	View
3.04	View Assignment and Transfer History	Read Only	Enabled	View
3.05	Manage Service Level Address	Read Only	N/A	N/A
3.06	Mark Service as used by DYS (Add/Edit)	Read Only	Enabled	View
Rates				
Rates for Out of Home Service(s), Kinship Care and Guaranteed Bed rates for a selected Provider.				
4.01	View and Access Rates	Read Only	Enabled	View
4.02	Manage a Rate Record (Add/Edit/Delete)	Read Only	Enabled	View
Contract Management				
Manage Contracts for Service(s) for a selected Provider				
5.01	View and Access Contracts	Read Only	Enabled	View
5.02	Manage Contracts (Add/Edit/Delete)	Read Only	Enabled	View
	Contract Service detail values will be available based on the Service Category and Service Type selected	N/A	New	N/A
	End-date and re-use service detail mid-contract	N/A	New	N/A
Approvals - Certifications/Licenses/Register				
"Certification, Licenses, Approvals" in Trails Mod				
6.01	View and Access Service Approvals	Read Only	Enabled	View
6.02	Manage Service Approvals (Add/Edit/Delete)	Read Only	Enabled	View
6.03	Manage Requirements Checklist (View/Add/Edit/Delete)	Read Only	Enabled	View
6.04	Manage Capacity and Preference (View/Add/Edit)	Read Only	Enabled	View
6.05	View and Access Service Approval Summary	Read Only	Enabled	View

Ref#	Function	Legacy Trails	Modernized Trails	Link to Trails Mod Training Document
6.06	Request Acceptance of Service Approval	Read Only	Enabled	View
6.07	Approve/Deny a Service Approval (by supervisor)	Read Only	Enabled	View
6.08	Close a Service Approval	Read Only	Enabled	View
Fiscal: Payroll Processing				
7.01	Payroll Processing	Retained	Not Enabled	N/A
7.02	Trial Payroll	Retained	Not Enabled	N/A
Incidents				
8.01	Search for / View an Incident	Retained	Enabled	County DCW DYS Provider
8.02	Manage Incidents (Add/Edit/Delete)	Read Only	Enabled	County DCW DYS Provider
8.03	Submit Incident	Read Only	Enabled	DCW DYS
8.04	Restrict / Unrestrict an Incident	Read Only	Enabled	County/DCW DYS
8.05	Lock / Unlock an Incident	Read Only	Enabled	County/DCW DYS
8.06	Close an Incident	Read Only	Enabled	DCW DYS
8.07	View Incident Summary (View/Edit)	Read Only	Enabled	DCW DYS Provider
8.08	Manage Incident Actions Taken (Add/Edit/Delete)	Read Only	Enabled	DCW DYS
8.09	Manage Incident Media Contacts (Add/Edit/Delete)	Read Only	Enabled	DCW DYS
8.10	Manage Incident Notifications	Read Only	Enabled	DCW DYS
8.11	Manage Incident Parties and Witnesses (Add/Edit)	Read Only	Enabled	DCW DYS
8.12	Manage Incident Follow-up/Closure Record (Add/Edit/Delete)	Read Only	Enabled	DCW DYS
8.13	Manage Incident Injuries	Read Only	Enabled	DYS
8.14	Manage Incident Interventions	Read Only	Enabled	DYS
8.15	Manage Incident Protective Devices (Add/Edit/Delete)	Read Only	Enabled	DYS
8.16	Manage Incident Situational Response Matrix	Read Only	Enabled	DYS
8.17	Manage Incident Review	Read Only	Enabled	DCW DYS
8.18	Download Provider Incident Results (to .csv file)	N/A	New	View
Institutional Assessment				
9.01	Stage I	Retained	Not Enabled	N/A
9.02	Stage II Follow-up	Read Only	Enabled	View
	View and Access County Stage II Follow-Up	Read Only	Enabled	View
	Edit County Stage II Follow-Up	Read Only	Enabled	View
	Request Approval for Stage II Follow-Up	Read Only	Enabled	View
	Approve/Deny Stage II Follow-Up	Read Only	Enabled	View
Resource Queues				
10.01	DCW Incidents List	N/A	New	DCW
10.02	Active Incidents List	N/A	New	County Cert. Worker Public CPA Public Facility Worker Monitoring Specialist
10.03	ARD Reviewed Incidents List	N/A	New	ARD Cert. Reviewer
10.04	Screened Out Referrals List	N/A	New	Monitoring Specialist
10.05	Stage II Follow-Up List	N/A	New	County Cert. Worker County Kinship Worker
10.06	Monthly Provider Contracts List	N/A	New	County Cert. Worker
10.07	Inquiries/Recruitments List	N/A	New	County Cert. Worker
10.08	Pending CPA Foster Homes	N/A	New	Licensing & Certification Coordinator
10.09	Open, Pending, and Probation Licensed Providers List	N/A	New	Licensing & Certification Coordinator Monitoring Specialist
10.10	Certified Providers	N/A	New	County Cert. Worker Public CPA
10.11	Placement Availability List	N/A	New	County Cert. Worker Public CPA
10.12	Associated Providers/Facilities List	N/A	New	Public Facility Worker
10.13	Kinship Providers List	N/A	New	County Kinship Worker
10.14	Initial Kin Needs Assessments Due List	N/A	New	County Kinship Worker
10.15	Visit Due List	N/A	New	Monitoring Specialist Licensing Specialist
10.16	Requirements Expiring/Expired List	N/A	New	County Cert. Worker
10.17	Expiring & Renewal Certified Providers List	N/A	New	County Cert. Worker Public CPA
10.18	Expiring & Overdue Licensed Providers List	N/A	New	DCW
Reports				
All Resource and Incident reports will still be run out of legacy Trails		Retained	Not Enabled	
11.01	Reports accessed from legacy Trails Menu	Retained	Not Enabled	N/A
11.02	Resource Reports accessed from Provider-level (example: button to generate the Contacts login legacy Trails)	Read Only	Enabled	N/A
11.03	Download Provider Incident Results (to .csv file)	N/A	New	View

Trails Security Profiles

New security profiles will be created to grant access to modernized Trails and that will be different and separate from security profiles in legacy Trails. Click here to view the [Trails Security Profiles Matrix](#) as of November 27, 2019.

Service Authorization

Service Authorization will continue to be done in legacy Trails under the Client.