

ORS 10.5 is a large release in terms of features – most of the new features are in the Head Start module that is being released with this version. But, there is plenty of other new magic even if you are not using the ORS Head Start. Yet.

General

- Obviously, the biggest part of this release is **the Head Start (HS) module**. ORS Head Start tracks medical information, basic Head Start demographics, IEP, IHP, screenings, etc. We also have an extensive menu of reports for class lists, waiting lists, information letters and whether they were returned or not. We talked with several Head Starts to find out what was needed. We are missing the PIR report in this release of ORS, but the next release will have the PIR report in the spring of 2011. In the meantime, we are working with some beta sites to make certain that ORS covers all the things you need it to do.
- ORS now has a **Staff Activity Detail Report** showing the clients served by each staff member, broken out by transaction type.
- You may now default **Service locations** for each Program.
- We added a utility report to show you **which Services are not used** in ORS. Remember the first day of training? We go through the Services list and remove what you don't use and add in things you need. Now you can see which of the Services have never been used and clean up your Services again.
- In ORS you may set fields to be 'mandatory' for the transaction types. You could set the social security number, for instance, as a mandatory field for vouchers. You could even set more than one field to be mandatory for a transaction type. In this version of ORS if you enter a transaction with more than one mandatory field which has not been entered, **all of the missing mandatory fields are displayed at one time**.
- There is a new audit report to show you which **Required/ Requested/ Mandatory fields are missing** by client/customer. There is a comprehensive selection screen giving you the options of choosing Family or Individual Required/Requested fields, what type of transactions you want to check for Mandatory fields, and, of course, which program(s) you want to include on the report.
- You may now **tag any of the entries in the Setup tables as inactive** – just as we do for Staff with the leading Ø. These entries will appear at the bottom of the drop down menus.
- ORS now has **CSBG Service Categories** on all of the transactions (Goals, Services, Referrals, Vouchers, etc.).
- **Referrals may be defaulted to 'From' or 'To', 'Written' or 'Verbal'** in the Organization table.
- The **Payment Assistance Chart calculates benefits on the annual income**.
- The Enroll/Terminate utility on the Utilities tab lets you **set the Enrollment Date to the Intake Date**.

Program Setup

- There is a **Program Setup Report** to show you all of the default staff members, the default Services, which users are assigned to the Program, the Required/Requested fields, Application Processing defaults, default Referrals, etc. This report will give the ability to quickly review everything for one Program.

Families and Individuals

- On the Family/Individual screen there is now a **Family Inquiry button**. This is a useful screen to view all of the family members on four different tabs: Programs, Income, Demographics, and Transactions.
 - On the Program tab you see all of the Programs and all of the family members – and who is in which program, their enrollment date, termination date, etc.
 - On the Income tab you see all of the Income Types reported for this family and which family members have income assigned to them.
 - On the Demographics tab you select which demographics you want to display on the screen. This lets you ‘compare’ the various demographics between family members.
 - On the Transactions tab you see all of the Transaction types, which family members have transactions with the number of transactions and the latest date of the transaction.
- ORS now has several additional reports on the ‘Print Application’ button at the top of the screen:
 - Family Detail Report – this contains all of the information the basic Family Application contains but will let you customize the information in different ways.
 - An Individual Detail report of all the family members.
 - An Individual Detail report of just the individual highlighted on the individuals’ grid. This will let you customize an individual application.

Client Characteristics Report (Demographics)

- There are two new features to this report:
 - Income types (on the Family) now have three counts associated with them: **the number of unduplicated families reporting one or more sources of income, the number of families reporting zero income, and the total number of unduplicated families reporting one or more sources of income or zero income.** This is required for the new NPI reports for CSBG agencies.
 - ORS will give you **a count of the number of persons and families in each five digit zip code.**

Services

- On the Services screen you may now **add multiple Services for one client from one screen**. The screen is similar to adding a Service for multiple family members. You may select from all of the Services in the lookup table or the default Services for the Program providing the Services.
- And a minor change: when you click the binocular icon next to the Services field, for the default Services, **the list of Services now displays in description order** rather than code order.

Reporting

- The **Report Designer Plus (RDP) returns to the selection screen when you close the report**. The RDP is used to map your NPI report or any other report which has rows and columns.
- We have **added the date the goal was written to the Goals Without Evaluations Report as well as breaking out the report by Program**. This lets you determine if it is a recent goal (maybe the client has not returned for an eval yet) or it is from an earlier time and should be deleted.
- The **Individual Summary report lets you choose whether to print in Family ID order or by last name in alphabetic order**.
- The **Individual Agency/Program/Individual report (program listing report for Individuals) lets you choose whether to print in one of the four orders**: (1) Individual order (Family ID); (2) Alphabetic (last name and then first name); (3) Enrollment Date; or, (4) Termination Date. This will give a better way to print program or class rosters.
- The **ORS Dictionary reports now include the Individual User Defined Fields** in the report format drop down menu.