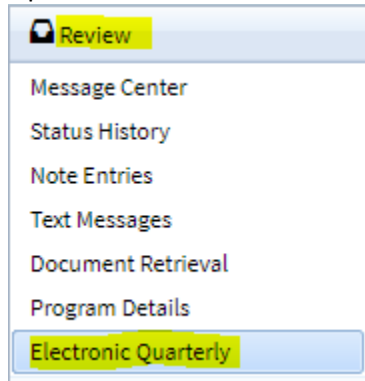Individual submissions:
- From the user profile
  - Open the "Review" slider
    -

    - Select "Electronic Quarterly"
- Here you will see a list of previous submission attempts
  -

    - If no submissions have been preformed this list will be empty
    - If no submissions attempts have been performed for the quarter, they also will not show
- Color Schemes
  - No Record – No submission attempt has been made for the quarter
    - When ready, send the record for submission
      -

  - Yellow – Records are queued and ready to be sent
    - Record is queued and ready to be sent
      - While you cannot queue a record from the client profile, it may have been queued from the batch submission
    - Changes to client profiles can still be made even though the record is queued
    - When ready, send the record for submission
      -

- o Red – A submission attempt was made, but failed
  - Failed submissions do not pass validation (either by us or the state)
  - Errors may be viewed by selecting a record and clicking on the pencil
    - o
      - A detailed list of failure reasons will be supplied

Quarter	FY2020: Q3
Reply	PLEASE REVIEW THE FOLLOWING: *[ASSESSMENT]: [LSIR/05-03-2018] RISK LEVEL IS REQUIRED ON ALL ASSESSMENTS... *[ASSESSMENT]: [LSIR/05-03-2018] RISK LEVEL RESULTS ARE REQUIRED ON ALL ASSESSMENTS... *[INTAKE]: ARREST (COMPLAINT/PETITION) DATE IS REQUIRED... *[TREATMENT]: DIAGNOSIS REASON IS REQUIRED...
  - Once reviewed, and the data fixed – the submission process will start again by submitting the record:
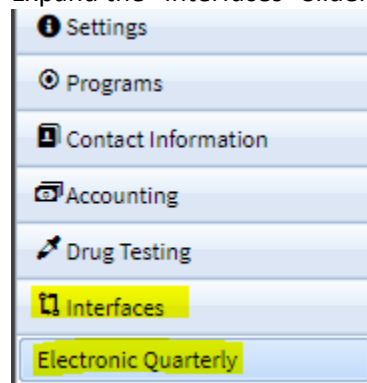   - o
  - Green – A submission attempt was made, and it succeeded
    - The record passed submission validation and was successfully sent to the state
    - While there was success – it is encouraged that the record be checked for thoroughness and resubmitted if necessary

- Batch Submissions:
  - o From the main screen
    - Open Location Config
    - Expand the "Interfaces" Slider
      -
    - Select "Electronic Quarterly"
  - o You are presented a list of clients that may be eligible for submission
    - If people are missing – you'll need to check the participant's profile and make sure all data is entered

- If there are extra people – You'll need to check the participant's profile for erroneous data.
- Remember: All participants can be sent individually from their profile
  - Color Schemes:
    - White – No Action has been performed on a client
      - No submission attempts have been made
      - Data should be reviewed and verified
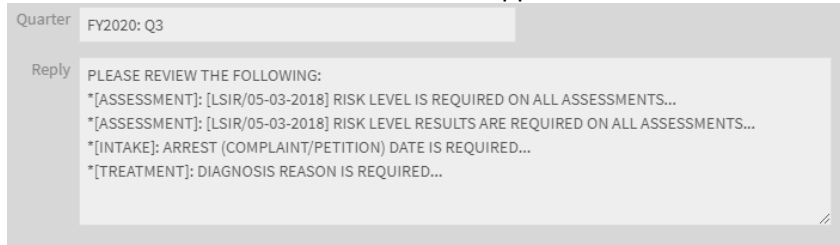   - When ready, queue the record

        o

    - Yellow – Records are queued and ready to be sent
      - Record is queued and ready to be sent
      - Changes to client profiles can still be made even though the record is queued
      - When ready, send the record for submission

        o

    - Red – A submission attempt was made, but failed
      - Failed submissions do not pass validation (either by us or the state)
      - Errors may be viewed by selecting a record and clicking on the pencil

        o

        - A detailed list of failure reasons will be supplied

Quarter	FY2020: Q3
Reply	PLEASE REVIEW THE FOLLOWING: *[ASSESSMENT]: [LSIR/05-03-2018] RISK LEVEL IS REQUIRED ON ALL ASSESSMENTS... *[ASSESSMENT]: [LSIR/05-03-2018] RISK LEVEL RESULTS ARE REQUIRED ON ALL ASSESSMENTS... *[INTAKE]: ARREST (COMPLAINT/PETITION) DATE IS REQUIRED... *[TREATMENT]: DIAGNOSIS REASON IS REQUIRED...

      - Once reviewed, and the data fixed – the submission process will start again by queuing the record:

        o

    - Green – A submission attempt was made, and it succeeded

- The record passed submission validation and was successfully sent to the state
- While there was success – it is encouraged that the record be checked for thoroughness and resubmitted if necessary