

UC Portal and Technology Updates *September 7*

UC Portal Users <UC-PORTAL-USERS@LIST.NIH.GOV>

on behalf of

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To:UC-PORTAL-USERS@LIST.NIH.GOV <UC-PORTAL-USERS@LIST.NIH.GOV>

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Greetings,

Based on feedback from UC Portal users, we have made the following improvements to the UC Portal, which will go live on 09/07/23 at 1:00AM EST! Please read the following carefully to understand how these changes will impact your workflow within UC Portal.

Key Highlights

- Removing the “ORR Notifications” table for Non-Emergency SIRs and Historical Disclosures
- Adding “N/A” to the “Alleged Perpetrator” dropdown in Historical Disclosures
- Removing the requirement of “Legal Status” on the Sponsor Assessment
- Adding the “Case Manager Assessment” tab in the Expedited Sponsor Assessment
- Adding more Sponsor-related categories in the UC Documents
- Collecting child eye color on the Initial Intakes Assessment
- Fixing an issue with the Sponsor Search
- Added “Pending Items” field to [Case Tracker 2.0](#)
- Removed expedited UC from UC Assessment stepbox in TKPI
- Please submit ideas for how to improve Portal [here](#)!

Live in UC Portal on September 7, 2023

Removing the “ORR Notifications” table for Non-Emergency SIRs and Historical Disclosures

On August 2, we released a revised and expanded set of categories for Child-Level Events, which include Emergency SIRs, Non-Emergency SIRs, Behavioral Notes, and Historical Disclosures. Additionally, there were revisions to the UC Policy Guide and Manual of Procedures. To ensure UC Portal is aligned with these new policies, we are removing the “ORR Notifications” table from Non-Emergency SIRs and Historical Disclosures. (The “ORR Notifications” table has never been on the Behavioral Notes form.)

To clarify, you will still need to complete the “ORR Notifications” table for Emergency SIRs, as well as email the Emergency SIR PDF to the appropriate ORR contacts. We hope that this change clarifies the expectations of reporting Child-Level Events and saves you time.

Adding “N/A” to the “Alleged Perpetrator” dropdown

After the new Child-Level Event categories were released in UC Portal on August 2, we received feedback from users that we have acted upon and are excited to release. In the Historical Disclosure form, one of the Child-Level Event types, there is a category “Past Abuse/Neglect Not in ORR Care or DHS Custody.” When submitting with that category, you are required to select an “Alleged Perpetrator” for the incident that is being documented. However, multiple users provided feedback that for some circumstances, such as an instance of “Past Mental Health Concerns,” there is no alleged perpetrator.

As a result, we have added an “N/A” option in the “Alleged Perpetrator” dropdown, which can be selected for any past abuse/neglect that does not have an alleged perpetrator. We are grateful to have received this feedback from the Office Hours and the UC Policy Inbox, and apologize for any confusion that was caused in the interim.

☒ Past Abuse/Neglect Not in ORR Care or DHS Custody

Alleged perpetrator: ---Select---

- ☐ Physical abuse
- ☐ Verbal or emotional abuse
- ☐ Neglect/abandonment
- ☐ Sexual abuse
- ☐ Sexual harassment
- ☐ Labor trafficking concerns
- ☐ Sex trafficking concerns
- ☐ Smuggling

---Select---

- Parent/Guardian/Caregiver
- Military Personnel
- Police/Government Official
- Foot Guide/Coyote
- Other Adult
- Other Child
- N/A

New Option

- ☐ Forced marriage with adult still in home country
- ☐ Forced marriage with adult in United States
- ☐ Domestic violence
- ☐ Adolescent/teen dating violence
- ☐ Inappropriate health intervention
- ☐ Past mental health concerns
- ☐ Witnessing traumatic events
- ☐ Other harmful or traumatic events

Removing the requirement of “Legal Status” on the Sponsor Assessment

Per an earlier revision to UC Policy Guide Section 2.6, ORR no longer requires proof of immigration status for a potential Sponsor in the Family Reunification Application. As a result, we are removing the requirement of the “Legal Status” field in the “Sponsor Demographic Information” tab of the Sponsor Assessment. That field remains as optional. Any past records of Legal Status will remain as-is, and any future Sponsor Assessments will not require that information to be collected.

Legal Status

Legal Status ← No longer required! -- Select Legal Status --

Legal status verified with non-expired documents? ☐ Yes ☐ No

List documents provided to establish proof of immigration status (or U.S. citizenship documents):

Adding the “Case Manager Assessment” tab in the Expedited Sponsor Assessment

As a reminder, the Expedited Sponsor Assessment is available for eligible cases, per ORR [Field Guidance #10](#). We have added the “Case Manager Assessment” tab to this Expedited Sponsor Assessment. The “Case Manager Assessment” tab has been available in the standard Sponsor Assessment, and it is now present for the Expedited Sponsor Assessment.

Adding more Sponsor-related categories in the UC Documents

There are now three Sponsor-related categories in the UC Documents section, to allow for additional detail and specificity of documents. Two categories are new: *Sponsor’s Authorization for Release of Information* and *Sponsor’s Family Reunification Application*. The third category, *Sponsor’s Supporting Documents*, is renamed from the old category of *Sponsor Documents*. Any previous documents under the *Sponsor Documents* category will now be under the new category name of *Sponsor’s Supporting Documents*.

Select Document Type

- UC Identity Document
- Sponsor’s Authorization for Release of Information**
- Sponsor’s Family Reunification Application**
- Sponsor’s Supporting Documents**
- Household Member Documents
- Adult Caregiver Documents
- Proof of Sponsor-UC Relationship
- Proof of Sponsor Address
- Case Management Notes
- Clinical Notes
- Home Study Report
- PRS Report
- UC DHS/Legal Documents
- L-3 Form

*** File Path:** Notification of Concern
Other

*** Document Type:** Select Document Type

New! New! Renamed from “Sponsor Documents”

When uploading a document to the child’s UC Documents file, please continue to pay careful attention to the dropdown options to ensure you are selecting the most appropriate category.

Collecting child eye color on the Initial Intakes Assessment

As part of the Initial Intakes Assessment, we are now recording the child's eye color. This will be a required field for all children, and you must enter a response to save the Assessment. The eye color options are below, which are a standardized list from the American Association of Motor Vehicle Administrators:

- Brown
- Black
- Hazel
- Blue
- Green
- Gray
- Pink
- Maroon
- Dichromatic
- N/A

When completing this field, we advise that you ask the child what their eye color is and enter their response. If there is a discrepancy between the child's response and your observation of their eye color, we advise that you use your best judgment. If the child is not old enough to respond, you can select the option that most closely matches your observation.

Fixing an issue with the Sponsor Search

Last Wednesday, 8/23, we released enhancements to the Sponsor Search interface and logic, to improve your ability in finding the Sponsor that you are searching for. That same day, we learned of a bug in the released changes and notified all UC Portal users in a separate email. The bug appeared if you searched for a Sponsor on the *Sponsor Information* section of the *Assessments* page. If your search returned zero results, the "Add New Sponsor" button remained disabled.

We have since fixed the issue and have returned to the intended functionality. After clicking on the "Add Sponsor" button on the *Sponsor Information* section of the *Assessments* page, you will see the enhanced Sponsor Search interface. Initially, the "Add New Sponsor" button in the top-right corner will be disabled.

Detailed Sponsor Search

First Name: **Last Name:**

Address:

City: **State:**

Date of Birth: **Country of Birth:**

Email Address: **A #:**

Primary Phone #: **Backup Phone #:**

Waiting for your search input...

Show entries

Refine Current Search:

Sponsor ID	First Name	Last Name	Address	City	State	Date of Birth	Country of Birth	Email	A #	Primary Phone #	Backup Phone #	P Counter	A Counter	Flag	Action
Waiting for your search input...															

Showing 0 to 0 of 0 entries

Previous Next

Once you search for a sponsor, no matter how many search results are returned, the "Add New Sponsor" button will enabled. **Please be sure to carefully review the results list, or conduct multiple searches, to ensure you do not create a duplicate profile for someone who is already in UC Portal.**

>| Add New Sponsor

Detailed Sponsor Search

First Name: Last Name:
 Address:
 City: State:
 Date of Birth: Country of Birth:
 Email Address: A #:
 Primary Phone #: Backup Phone #:

Please review the search results thoroughly before adding a new Sponsor!

Total displayed: 6
You searched for 'John', 'smith'

Show entries

Refine Current Search:

Sponsor ID	First Name	Last Name	Address	City	State	Date of Birth	Country of Birth	Email	A#	Primary Phone #	Backup Phone #	P Counter	A Counter	Flag	Action
665349	Johnny Smith	Duarte Villeda				12/4/1986	Albania					2	1	No	Assign Sponsor

Tableau Talk

The [Throughput Key Performance Indicators \(TKPI\) dashboard](#) is built in Tableau, a data visualization platform, using data from UC Portal. The TKPI Dashboard allows users to view (almost) real-time metrics to track and evaluate key performance indicators across the case management progress.

Based on feedback from TKPI users, we have made the following improvements to TKPI and other Tableau tools:

1. Added "Pending Items" field to [Case Tracker 2.0](#)
2. Removed expedited UC from UC Assessment stepbox in TKPI

Please read below for more details on each of these improvements:

- **Added "Pending Items" field to [Case Tracker 2.0](#)**
 - We have made updates to the new and improved Case Tracker which features the following improvements:
 - Users can now analyze cases entirely within the dashboard, in a similar format to Excel. Thus, exporting the data is not required for conducting analysis, although the option to export will still be available.
 - Users can select which columns they want displayed for the cases they are viewing, allowing for more pointed analysis of case management data.
 - Users can save custom views with a specific subset of kids AND a subset of columns which they can then share with other users.
 - Added "pending items" field
 - For a later release, fields (such as assessments or sponsor verifications) which are missing will be highlighted in red, quickly indicating which aspects of a case need to be addressed.
- **Removed expedited Cat 1 UC from UC Assessment Stepbox**

Questions or Suggestions

If you have questions or suggestions for improvements for the tool, please reach out to TableauSupport@acf.hhs.gov or join us at our weekly Office Hours on Fridays.

Office Hours on Fridays

The Office Hours hosted by the TKPI team and FFS are on **Fridays at 2pm ET**. During office hours, we provide everything from basic overview of TKPI for new users, how to use Tableau functionalities like subscriptions, views and filters to streamline your work, provide sneak-peaks of upcoming release updates, and troubleshoot individual issues/cases. For an invite, please reach out to Tableausupport@acf.hhs.gov.

UC Portal Helpdesk Information

The UC Portal Helpdesk is ready to address technical issues you may face. They can be reached by email at uachelpdesk@ap-in.com or by phone at 210-858-8304. The hours of operation are:

- Weekdays – 7:30AM to 11:00PM EST
- Weekends and holidays – 10:00AM to 7:00PM EST

UC Portal Feedback

We're always seeking to improve Portal, make it easier for you to do your work, and better support the children in our care. Have an idea for how we can improve Portal to help you do your job? Do you have a problem with Portal you'd like for us to review? Please submit your ideas and issues [here](#).

UC Portal Scheduled Down Time

*The UC Portal system will be temporarily taken offline starting **at 12:00AM ET Thursday 09/07/23** for the scheduled release. The process will last approximately **60 minutes, until 1:00AM ET**. You will not be able to access UC Portal during this time. Please make sure all your work is saved prior to the shutdown and you are logged out **by 11:55PM ET on Wednesday 09/06/23**. Failure to do so will result in data loss. If you need to complete a Verification of Release while Portal is offline, please reach out to your Federal Field Specialist to obtain a paper copy.*

To unsubscribe from the UC-PORTAL-USERS list, click the following link:

<http://list.nih.gov/cgi-bin/wa.exe?SUBED1=UC-PORTAL-USERS&A=1>