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Overview

This is the most significant update to Titanium in years. The challenge has been to incorporate new features while keeping Titanium familiar and easy to use.

This document highlights most of the changes and gives additional information to explain the ramifications of these changes.

Most of the changes are related to a new feature called *Data Forms* that will let you design fairly complex data entry screens that are associated with case notes. Specific Data Forms reproduce some of the original screens in Titanium, giving you more flexibility in customizing them to your needs.

Major Changes

Appointment Scheduling

Now, an appointment can be on unlimited schedules, instead of just two. For example, you can make a single *Staff Meeting* appointment and have it appear on 50 schedules. Any changes made to the *Staff Meeting* appointment are automatically reflected on all 50 schedules.

If you use Titanium to schedule other resources like therapy rooms, now you can schedule multiple counselors, the room, and some video equipment, all with a single appointment. Then, if the appointment is canceled, the cancellation shows as canceled on all schedules.

Attendance

A related feature is that every schedule has a separate attendance setting. So, if a few of those 50 counselors scheduled for the *Staff Meeting* don't attend, you can select `Canceled` for them, and `Attended` for the remaining counselors. Then, when you run reports, the attendance status is correctly processed for each counselor.

In a related example, in the past if two counselors were scheduled for group therapy and one of them couldn't make it, there was no good way to handle this in Titanium. Now there is. You can mark one of the counselors as a `No Show` or `Counselor Canceled`, and mark the other counselor as `Attended`.

Scheduling tab: Adding an Appointment to Multiple Schedules

There are some interface changes to the appointment screens that make it easier to schedule a single appointment on multiple schedules; and, to schedule multiple clients for a single appointment.

There is a new tab on the Appointment screens named *Scheduling*. From this tab, you can select all schedules the appointment should be on, and set the attendance individually for each schedule. There is also a feature to set the attendance for all of the schedules at once, both from the appointment screen and from the Schedule Viewer screen. The Group Roster and Schedule Viewer screens also have a new option to set the attendance for everyone in the group at the same time.

Group/Couples Roster for Recurring Appointments and Placeholders

Recurring appointment definitions and placeholders for group/couple appointments now support a roster of clients just like the group appointment does. This feature augments the Group Sign-up Sheet (which is designed for dynamic groups), and makes it much easier to schedule recurring appointments for static groups like counseling for couples where the same two people will be in every appointment. Now, you can make a recurring couple appointment and both members will be in every appointment in the series. Or, you can make a placeholder for a couple and when you select `Add from Placeholder` the appointment that is added will have the two client members from the placeholder.

Default Case Note Types

You can now specify a default case note type for each appointment code. So, if you associate your *Intake Appointments* with your *Intake Case Note Type*, when someone selects `Case Note` from an appointment, the Case Note screen is opened with the default Case Note Type selected and the associated template automatically loaded. You can still override the default and select a different case note type, if desired.

Appointment Code Default Length

You can specify a default length for each appointment code. Then, when you add an appointment and select the `Appointment Code`, the length of the appointment is automatically set to the default. You can change this default length, if desired. For example, you can set medication follow-up to the psychiatrist to a default of 20 minutes instead of 60 minutes like most appointments.

Outreach, Service Provided to, and Status

You can specify if an appointment code should have *Outreach*, *Service Provided to*, or *Status* fields. Depending on the settings you choose, a Task List entry may be added if the appointment is marked `Attended`, and the specified field is blank. There is a separate setting for each field. (There is also a new Task List configuration option to specify if these reminders should show on the task list.) The configuration choices are:

- `Not used` – Field won't be displayed
- `Optional` – Field will be displayed, however if it is blank and it won't have a reminder on the task list
- `Required` – Field is required and a reminder will be put on the Task List if the appointment is `Attended` and this value is missing

Additional Information tab: Outreach and Service Provided to

The `Outreach` and `Service Provided to` fields have been moved from the area at the bottom of the appointment screen (that was opened by selecting the `Confirm` button on the toolbar) to the `Additional Information` tab. The `Confirm` button has been removed.

Client screen: Assigning Counselors to Clients

The previous version had only two places to assign a counselor to a client. This has been replaced with a new `Security` tab on the `Client` screen where you can assign multiple counselors to a client. So, a client can be on as many counselors' `My Clients` lists as needed.

Each counselor assigned to a client has their own `Active` flag, so a client assignment can be active for one counselor and inactive for another.

Now, when a counselor doesn't need to see the client anymore, he can change the `Active` status for just his assignment, and the client will remain `Active` for any other assigned counselors.

There is no longer a `Client Active` flag in the upper right corner of the `Client` screen. Now, a client is considered `Active` if they are active for ANY assigned counselor on the `Security` tab.

Client screen: Case Note Access Security

The new Security tab on the Client screen has a new `Client Access Level` setting. This allows you to restrict access to a client's file beyond the default setting. The default setting is the same as the previous version where CLERICAL level users can't see confidential case notes; and, TRAINEE level users can't see confidential notes unless they have been assigned to the client.

The Client Access Level option offers two new levels that are more restrictive. One level restricts all users other than SYSTEM level users from seeing confidential notes unless they are one of the assigned users. The level above that even restricts non-confidential information, like the appointment history, to users that have been assigned to the client.

When either of the Client Access Level settings is activated, only a SYSTEM level user can assign a counselor to a client or change the Client Access Level.

You can also use this feature to grant someone like a CLERICAL level user access to a client file that they normally would not have access to.

Non-client Notes

Crisis Intervention has been replaced by a more generic Non-client Note feature. It does everything that the old screen did, and allows you to use other Data Forms in addition to the old Crisis Intervention form.

You can also sign, forward, and lock these notes.

Centers that were using the Crisis Intervention feature for Triage, Consultations, and other non-client notes will find it more useful.

You can still assign a *Non-client Note* to a specific client. After you do this, the note is part of that client's file and must be accessed from that client. It won't be available from the Non-client Note feature anymore. This resolves a security issue where the old Crisis Intervention Notes were not treated as confidentially as other case notes.

User Accounts and Security

The previous version had a configuration feature named *Security Accounts* and another named *Counselor List*. These features have been combined into a single configuration screen called *Users and Schedules*.

This simplifies the setup and maintenance of new users. In the past, you had to add the user to the list of Counselors (if they had a schedule); then, go to the Security Accounts and enter their login user name and password; and then, optionally link it back to the Counselor record. Now you do this all from one screen. You just put a check in the columns to specify if an entry represents a Schedule, or a User. or both. If it is a User, then you also specify a login name,

password, and security level. If it is just a schedule, like *Conference Room*, then you would leave the login fields blank.

Minor Changes:

- The size of the name fields on the Client screen have been increased so they will accept up to 100 characters each.
- The two address fields on the Client screen have been changed from separate Address, City/ State, and zip code fields into a single large field that will accept large multiple line addresses. (Some international address can be 6 lines long.)
- On the Appointment screen, the Location and Description fields have both been increased in size to accept up to 100 characters.
- The Invoice Payment description field has been increased to 40 characters.
- The social security number field has been increased to 15 characters at the request of an international center.
- There is a change in a naming convention in Titanium. In the previous version, the word *Counselor* was used to represent a user, service provider, and a schedule. That was confusing because you had schedules for things like rooms. That resulted in references in Titanium to things like *Counselor: Room 101*. This version uses the more appropriate words in the various areas. So in the previous example, it would now be called *Schedule: Room 101*.
- Many screens in Titanium have a *Read Only* mode and an *Edit* mode. When you are using Edit mode, the text is displayed as black on a white background and is easy to read. However, in *Read Only* mode, all the controls were shown in the Windows Disabled color (medium gray text on a lighter gray background) which, while it make it obvious you could not change the information, also made it very difficult to read. Now, the *Read Only* colors for these controls are black on gray. The ease of reading these controls in Read Only mode has become more significant because once a Data Form is Locked you will see it in the Read Only colors. (For example, you shouldn't have to put the Client screen in Edit mode just so you can read the phone numbers more easily.)

Data Forms:

The most significant change to Titanium is the addition of a new feature called Data Forms that allows you to create your own data entry screens with the questions and answers you want. Unlike the limited user-definable fields that were available before in Titanium, this feature lets you create as many fields as you want, and as many screens as you want. We at Titanium can also use these Data Forms to create some pre-defined data entry screens like the CSCSMH Standardized Data Set and the CCAPS. All Data Forms are associated with a case note and they are locked when the case note is locked.

The Data Form feature was developed in response to the needs of the Center for the Study of College Student Mental Health (CSCSHM). We agreed to implement the Standardized Data Set (SDS) that they developed in Titanium and the Data Form feature was conceived as the best way to do this. As work proceeded on Data Forms, we realized that they could be used in other places in Titanium to add flexibility to the software. Data Forms also addressed the

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problem centers were going to have when they switched to the SDS. They are going to have two distinct sets of data: one from the old Titanium approach, and new data based on the SDS. Data Forms allow both of these sets of data to coexist in Titanium.

To make the update process as easy as possible, Titanium will create Data Forms matching your existing Titanium configuration so it will be easy to get started using the new version. If your center is going to adopt the SDS, then on the day you are ready to make the switch, you will deactivate the old Titanium Data Forms and activate the new SDS Data Forms, and start to use them from that date forward.

After you update, you will have the following Data Forms. You can modify most of them, and add new Data Forms, as desired.

Client Demographics

This Data Form replaces the Demographics tab on the Client Screen. It will look almost identical to the old demographics screen. Instead of Demographics being a tab on the Client screen, it is now a button on the Client screen toolbar. This also fixes a long-standing problem in Titanium related to overwriting the old demographics information with new information and losing the old information in the process. For example, if you saw a student as a Freshman in 2005, and they came back as a Sophomore in 2006, you would change their classification from Freshman to Sophomore. However, if you then ran a report on client demographics for the earlier year of 2005, that student would be counted as a Sophomore instead of a Freshman since that is the current value of the classification field.

Data Forms are associated with case notes so you can have as many of them as you want. Now, you would do a new Client Demographic Data Form every time you had an intake for the client, and you would not overwrite any of the old data. When you run a report for 2005, you would specify that you want to use Data Forms from 2005 and it would correctly treat the client as the Freshman they were in 2005.

Crisis Intervention

This Data Form replaces most of the fields on the Crisis Intervention screen. The Crisis Intervention menu option and screen have been replaced by a more generic and flexible screen called Non-client Notes. This name more accurately reflects how that area of Titanium is being used. The screen that was named Crisis Intervention is now just one of many Data Forms that can be attached to a Non-client Note.

Additional Information Lists

If you had created any Case Note Additional Information lists (e.g. Client Concerns, Presenting Problems, etc.) these will also be converted to Data Forms. The name of the Data Form will be the name you gave the Additional Information lists in Titanium. The Additional Information lists feature was limited to just simple questions with numerical answers. The Data Form feature is much more flexible.

SDS (Standardized Data Set)

This Data Form encompasses the SDS developed by the CSCSHM. If you use this form, it will probably replace the Client Demographics Data Form mentioned above, and it may also replace some of your Additional Information Lists. Because this is a standardized form, you can't modify the existing questions, or the answers to those questions. You can, however, turn-off questions you don't want to use. And, you can add your own questions.

CCAPS (Counseling Center Assessment of Psychological Symptoms)

This Data Form is the 70 question assessment measure from the University of Michigan. There is no charge to use the CCAPS, however you will have to turn it on by accepting their Terms of Use agreement in the System Configuration screen in Titanium. You won't be able to modify the CCAPS Data Form in any way since it is a copyrighted work, and because it will be automatically scored by Titanium based on one of 5 norms. (Undergraduate Male, Undergraduate Female, Graduate Male, Graduate Female, and All Students) If we don't have the gender or graduate status, we will use the *All Students* norm. The scoring produces a CCAPS Profile Report which shows the current administration, as well as up to three previous administrations.

When should you update?

This is up to each center. (Please read the warning at the end of this document since some centers that are running additional features of Titanium shouldn't update until those additional features have also been updated.)

This update will change the way data is stored in Titanium and correspondingly, will also impact some of the reports. If you have a particular date range (e.g. semester or year) in which you collect statistics, you might want to time this update to match the beginning of your next statistic period. This is even more important if you will be adopting the Standardized Data Set. You won't be able to run a single client demographics statistics report that includes data both before and after you adopt the SDS. You must run two separate reports: one on the data before you started using the SDS; and, one on the data after you started using the SDS.

We will continue to support the current version for at least one year from the release of the new version. However, there will be few, if any, updates and bug fixes to the current version.

How to update to the new version?

The first step is to send an email to Support@TitaniumSoftware.com and let us know what date you would like to update. We will schedule it so that not too many centers are updating at the same time so we can provide an acceptable level of technical support. If all of our 300+ installation tried to update on the same day, it would overwhelm our technical support capacity.

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This update will require the involvement of your computer support people since it requires changes to the Titanium database on the SQL Server that usually only they have the security rights to perform.

Warnings:

- If you currently used the Client Import feature to pull information from your university database, you should talk to us before updating to this version. Since the client demographic fields have been moved to a Data Form, the current Client Import program won't work. (You can turn-off the Client Import feature, and the new version will work fine.)
- If you use the routine that replicates Titanium appointments into Microsoft Exchange, you should contact us before updating to the new version. The program hasn't yet been updated to work with this new version. (You can turn-off the Exchange Sync feature and the new version will work fine.)