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| EOTS – Complete Phase at end of Question Set |
| Video Transcript |
| OFFICIAL |

This video contains a short tutorial on how to complete the Phase at the end of a Question Set in the Enterprise Outcomes Tracking System.

When you first create a Case in the system, it will be in the Baseline Phase.

Once you've completed all the questions, you will be able to complete the Phase and generate the question set again, ready to complete the first "Review". Or complete a "Final Closure” if there is no review needed.

In this video we will cover how to complete a "Baseline Phase" as well as "Final Closure".

On the dashboard screen, locate the relevant Client, then click "View".

This will take you to the "Manage Cases and Groups" screen.

Click "view" for the relevant Case.

This will take you to the "Manage Question Sets" screen.

Locate the Question Set you wish to complete, then click "View".

This will take you to the "Question Set" screen.

For this tutorial we are opening a Baseline Question Set we have already filled out and saved.

For instructions on filling out the "Question Set" screen, please see the tutorial titled “Work Through a Question Set".

At the bottom of the screen, click "Complete Phase".

You'll be prompted to confirm that you would like to complete the Baseline Phase and generate the next Review phase for this Question Set.

Note that once the Phase is marked as "complete" the responses cannot be amended.

Click "OK" to continue.

You will be returned to the "Manage Question Sets" screen.

Here you will see that the Case remains "Open”, but the phase has moved to “Review 1” and there are zero responses recorded in the "Progress" column.

When you view this Question Set it will now be blank ready for you to record the responses for the next Phase.

We will now repeat these steps to mark a Question Set in a Review Phase as “Complete" and complete a "Final Closure".

On the bottom of the "Question Set" screen, click "Complete Phase".

You will be given the following options: "Complete Phase and Generate Next Phase" if the Case remains open and you would like another Review. Or "Finalise Question Set" if the Case is being closed.

For this tutorial we will select "Finalise Question Set" to complete "Final Closure".

Click "OK" to continue.

You will be returned to the "Manage Question Sets" screen and here you will see that the Case status is now "Closed".

Thank you for watching.

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