

Changes to SOR-RL SOR Reporting for Service Providers as of February 2020			
Release 1 SOR Functionality	Group Impacted	After Feb 2nd SOR Functionality	Further Action
CAS Case Manager view allowed search of SORs assigned to their dashboard but did not allow search for SORs that have been submitted to agency.	CAS Case Managers	CAS Case Manager now has ability to search for SORs that have been assigned to their agency as well as viewing them on dashboard.	Update will be made to User Guide
Each notification that was entered required user to save and the entry and then go in and add another notification.	SOR Initiator	When inputting notifications for an SOR input is now allows multiple separate notifications on one screen without pressing "Save & Next" and then "Add" for each notification. UPDATE: Button has been added and is now called "Save & add another" to allow user to remain on the same screen and add all relevant SORs.	Update will be made to User Guide
Category - Serious Complaint question related to criminal activity was causing confusion.	SOR Initiator	When an SOR category of Serious Complaint relates to criminal activity, the columns "by whom" and "against whom" have be relocated in the question chain in order to streamline and clarified response to be clear.	Update will be made to User Guide
Comments section functionality was not clear. At first submission of an SOR, SOR Initiators were using the comment section to add more details related to the incident. This was not the intended use for the comments section.	SOR Initiator	On the External service provider reporting side, the "Comments" section will remain on the Serious Occurrence summary page, and will only be accessible during the "Additional information/Revision required" status, and when the ministry SOR Lead identifies that additional information/Revision is required in the comment section will be mandatory for SOR Initiator to fill in.	Update will be made to User Guide
The date formatting for the various columns did not align with the new Global rule change.	ALL	The new format is YYYY-MM-DD	Update will be made to User Guide
Users made requests for changes to the individual dashboards to improve their ability to monitor and track SORs more efficiently	ALL	Overall Dashboard updates/ refreshes for all users : improved view, and key information now available: 1. On the breadcrumb of all modules, instead of "Dashboard" displays "SOR-RL" as the first step. 2. On the landing page of all modules, instead of "See workload" to display "See dashboard" 3. SOR Initiator dashboard: now displays the name of SOR Initiator in place of SOR Lead. Also lists the most recent SOR Initiator who has submitted/updated the SOR. Column header has been added: Submitted / Last Updated By	Update will be made to User Guide

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Dashboard view was identified on the landing page as "See Workload"	ALL	On the landing page of all modules, instead of "See workload" to display "See dashboard"	Update will be made to User Guide
Dashboard view did not provide key details required by SOR Initiators and SOR Leads	ALL	Overall Dashboard updates/ refreshes for all users improved view, and key information now available	Update will be made to User Guide
SOR Initiator dashboard did not show the name of the SOR Initiator but showed SOR Lead. Did not show date submitted and who last updated the SOR	ALL	On SOR Initiator dashboard: now displays the name of SOR Initiator in place of SOR Lead. Also lists the most recent SOR Initiator who has submitted/updated the SOR. Column header: Submitted / Last Updated By	Update will be made to User Guide
Uploading powerpoint docs was not an option.	ALL	SOR Initiator now able to upload power point docs as a type of document in SOR-RL	Update will be made to User Guide
Notification of results of investigation was not clear.	ALL	Logic included so the the question of whether the individual has been informed is only available if the investigation has been completed.	Update will be made to User Guide
There was no validation to prevent users from entering duplicate ID#s when adding multiple individuals	ALL	Added validation to prevent users from adding more than one individual with the same CPIN/DISCIS/YOTIS to a serious occurrence	Update will be made to User Guide
SOR Initiator comment when submitting an update/revision was not a required field. So service providers were not always adding comments to describe what they have updated/ revised.	All	When SOR Lead requests additional information/revision required, SOR Initiator is required to input comment back when submitting said revision. An asterisk is now noted beside the Comment box to flag that this is a required field.	Update will be made to User Guide
Date of legal release was not clearly outlined in system (YJ specific field). If a youth is in custody and has a hold on them for other charges they can satisfy one sentence but still be held in facility until other charge(s) are dealt with. In this case we may not know when the individuals legal release date is as it has yet to be determined. Date of legal release was a mandatory field.	YJ Service provider	The system will now let you save this page without entering in a date.	Update will be made to User Guide

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When selecting "related to" "Service Provider notification" page did not relate the category the individual was notified about.	ALL	When a client is selected in the "Related to:" dropdown, the "Category notified about" checkboxes with all the categories related to that client are now displayed for all notification types, and mandatory every time a notification is made for the client	Update will be made to User Guide
Media attention : "Has there been media attention?" vs "Is media attention expected" Were available at initial submission but not at time of updates.	ALL	Section on media attention questions updated to allow the questions to be answered at updates, as well as at initial submission.	Update will be made to User Guide
Requirement of YOTIS# and legal guardian were mandatory fields. (YJ specific field)	YJ service providers, DOFB, Probation	The requirement for YOTIS has become optional for CP & EJM so that the SOR can be closed if these are not available	Update will be made to User Guide
Mandatory fields, regarding "does individual have a placing agency" prevented an SOR from being submitted if the information was not available at time of submission.	ALL	On the " Add individual " page, for non YJ clients, if the "Program at time of occurrence" has "Child Protection Services" selected , then the question "Does this individual have a Placing Agency?" can not be answered with a "No". Only a "Yes" and "Unknown at this time" can be selected to allow the submission to proceed. The placing agency information will need to be added before the SOR can be deemed "no further action".	Update will be made to User Guide
If placing agency is not known at time of first submission of an SOR, there was no option to select Unknown at this time to allow the SOR to be submitted, and updated later.	ALL	On the New Serious Occurrence flow, on the Individual's involved page, for the question "Does the individual have a placing agency?" ADDED third option: "Yes" "No" "Unknown at this Time". This question will now be mandatory when adding this individual. If "Yes" is selected, then subsequent information will be mandatory as well.	Update will be made to User Guide
Selection of Probation officer allowed a "yes" or "no" option for a YJ facility SOR.	YJ Facility SOR Initiators	For a YJ facility SOR, if the individual that is being added has "Probation" and/or "Probation Detention" selected as their "Youth Justice YP Identifying Factors", then the option of "No" is not available for the question "Does this individual have a Youth Justice Probation Officer?".	Update will be made to User Guide

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Program list contained "Dom Hostels" and "Homelessness" as options in the drop down list.	ALL	"Dom hostels" and "Homelessness" removed from program list.	As a result of this change, any SORs that were submitted prior to Feb 2nd, SPs and ministry will no longer see them in their dashboard, and cannot search for them. For any missing SORs please submit a JIRA ticket and identify the missing SORs, and identify an alternate program type from the available drop down list. We will work with IT to update those SORs so they will be available to SPs and ministry once again.
Program List of service at time of SOR did not have "Children's mental health" and "Youth Prevention Initiatives" as options in the drop down list.	ALL	Added two programs to program drop down list: Children's mental health and Youth Prevention Initiatives	Update will be made to User Guide
Rolling 7 day schedule for when updates are required following initial submission of an SOR was set up as calendar days, rather than business days.	ALL	The update process for Serious Occurrences has been set to be a rolling 7 BUSINESS days schedule, rather than the current 7 calendar days schedule.	Update will be made to User Guide
The SOR summary, under "Categories" showed the subcategory and not the main category.	ALL	Main category and subcategory now show in the summary. Users can now see the first level of a category as well as the subcategory.	Update will be made to User Guide (screen shots updated as needed)
"Last report" flag when Service provider provides an update is not an option (only at first submission)	ALL	Added last report flag and desc to updates page; These update values will only be displayed on the update's ROLLUP (REVISION) as well as snapshots	Update will be made to User Guide
Box for debrief "Please Explain" word count was limited to 300 words	ALL	Increased word count capacity in the debrief "Please Explain" text box	No action required

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Notification types drop down selections did not include Probation Officer or Ombudsman.	ALL	In notification screen the following have been added: "Probation Officer" and notification to "Ombudsman".	NOTE: The addition of Ombudsman Notifications has retroactively added outstanding notifications to all SORs submitted prior to Feb 2nd and we are working with IT to remove those outstanding notification notices in the system. Service Providers should not take any further action regarding these notices; In addition, the notification to Ombudsman was incorrectly added as "mandatory for all categories". We are working to correct this error by March 1, 2020. In the meantime, service providers should be aware that there has been no change to the legislation that outlines Ombudsman notification requirements in relation to SORs.
When adding individuals, parent guardian information was required as a mandatory notification.	ALL	An option to select "NOT Applicable" has been added to notifications to parent guardian for individuals who are not under the care of any parents/guardians.	NOTE: the addition of the "Not Applicable" option has resulted in SORs that were submitted prior to Feb 2nd to show outstanding parent/ guardian notifications, and the SORs cannot be deemed no further action. We are working to correct this error by March 31, 2020. In the mean time service providers should be made aware that no further action is required by them as a result of these notifications.
User management: names with special characters could not be entered in user names or email addresses in SOR-RL.	ALL	System now allows special name characters for user names and email addresses.	LRA who are responsible for User Management processes need to review so they can align with this functionality
User Management screen: list of users was not available. Individual users/sites had to be searched.	LRAs, and SP Admin	Update: the "list of users" with the users that have already been added now shows their main details (first/last name, position, username, what sites they can access) appear on this screen once added	SP Admin and SP with LRA functionality should be made aware of this improvement.

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LRA reactivation of user account functionality	LRAs	LRA have ability to re-activate a user account that has been deactivated (i.e. employee on leave and returns).	LRA who are responsible for User Management review User Management processes to align with this functionality
Service Provider Admin LRA role could not make corrections of names in the system, required a request for ministry support to make users corrections	LRAs	The Service Provider Admin LRA role has been given the ability to modify the First Name and Last Name fields for External users associated with their Service Provider.	Update will be made to LRA User Guide
Wording at the end of "Abuse/Mistreatment category was confusing	ALL	Wording at the end of the "Abuse / Mistreatment" category asks the user <i>If</i> allegedly abused, neglected or exploited, by whom? -> Service Provider, Another Client, Other person working with Client, Family Member, Other " which is a mandatory field. Update made to system to clarify "Who has allegedly abused, neglected or exploited the individual - Service Provider, Another Client, Other person working with Client, Family Member, Other?"	Update will be made to User Guide
For YJ and Non YJ services, there was a drop down box for Level 1 SOR Notification to record immediate notification to the ministry, in addition to submitting the report within 1 hours.	ALL	Since Level 1 immediate notification is not required for Non YJ, the reference to "immediate" in the drop-down menu has been removed. YJSD is continuing an established practice and the prompt that this is mandatory will continue. Current: "Ministry – Level 1 SOR – Immediate"; Change to: "Ministry – Level 1 SOR"	No action required
For the category "Improper release" the was no radial button to include "other", and a request to specify with a text box.	YJ service providers, DOFB, Probation	Radial button options added to include "other" and "specify" with a text box.	Update will be made to User Guide
Status of alleged abuse radio buttons - did not have an option of "not applicable" so SORs could not be completed if the fields were not completed.	ALL	Radial button added for the status of an alleged abuse to be able to select "not applicable".	Update will be made to User Guide
Select contraband/safety risk type dropdown - text edit for "other items" was not clear.	ALL	Edited text to read: "Other items that pose a threat to the safety of the individual, other individuals, staff, service provider operations and/or the public, and/or are used with the intent to cause harm to the individual or others, including the possession of items contrary to policy, procedures and/or standards."	Update will be made to User Guide

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Serious Individual Action - Assaults Selection Wording around the role was not clear.	ALL	Under Abuse/Mistreatment" and serious individual action/assault the word "role" is changed to " Individual's Role"... and "Claim" to " Individual's Claim".	Update will be made to User Guide
Debrief following a restraint documentation was not clear	ALL	Changes were made to wording to clarify	Update will be made to User Guide
Level 1 prompt questions for subcategory of serious charges was not available.	ALL	Level 1 prompt for the Serious Charges subcategory. Update: "Do the new charges represent a significant individual or public safety concern?" Y/N answer to determine Level 1 or 2	Update will be made to User Guide
Does YP have a Probation Officer?	ALL	Update: "Does this individual have a Youth Justice Probation Officer or will one be assigned to them?". Also added radial selection of "Unknown at this time" to allow the SOR to be submitted, and updates to be made when information becomes available.	Update will be made to User Guide
Wording for when an SOR is submitted outside of the reporting guidelines was not clear.	ALL	Updated wording: "Based on the information you have entered, this SOR is being submitted outside of the reporting timelines. Please explain why: _____"	Update will be made to User Guide